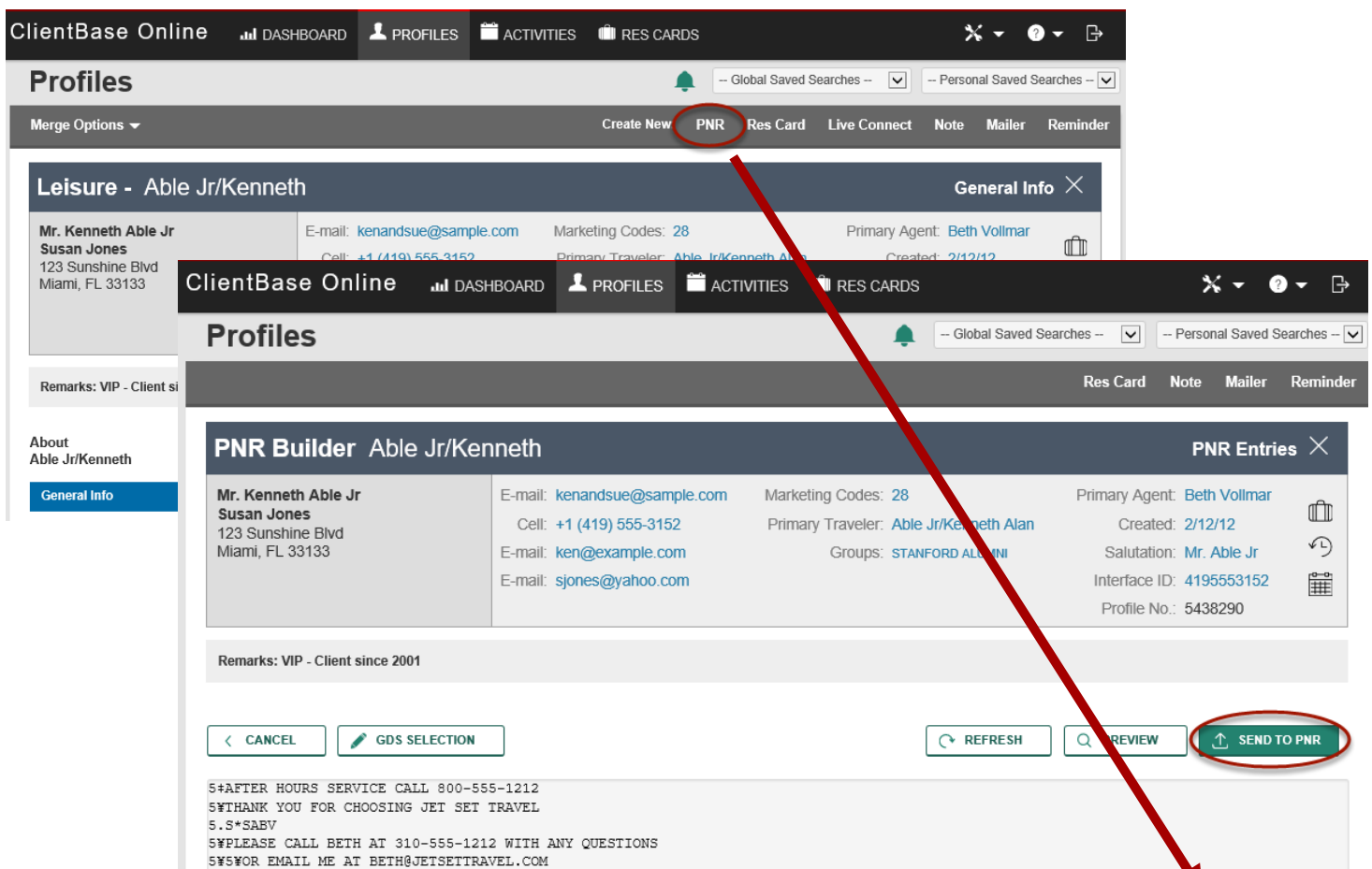


Save Time and Duplication with Merge to PNR

No more multiple entries or databases! *ClientBase Online* provides the ability to move customer information (maintained in the *ClientBase Online* profile) to your reservation system's PNR. This feature works with Amadeus, Apollo/Galileo, Sabre, and Worldspan. Sit back and watch your database grow and watch yourself become more efficient by using your marketing database to build PNRs. You'll be surprised at how quickly existing customer information gets updated, and how quickly new customer information gets added to your marketing database, when agents use it as their source for building PNRs. Also, watch your customer loyalty grow as agents access customer information when building PNRs for your leisure clients, rather than repeatedly asking them for the same information

Example: Patrick Young calls your agency to book some flights to Paris. You first locate Patrick's profile in your marketing database (*ClientBase Online*) and verify current address and phone information. Once confirmed, click the Merge to PNR button and within moments you have the PNR started with all of Michael's necessary information.



The screenshot shows the ClientBase Online interface. The top navigation bar includes DASHBOARD, PROFILES, ACTIVITIES, and RES CARDS. The main section is titled 'Profiles' and contains a 'Merge Options' dropdown and buttons for 'Create New', 'PNR', 'Res Card', 'Live Connect', 'Note', 'Mailer', and 'Reminder'. The 'PNR' button is circled in red. Below this, the 'Leisure - Able Jr/Kenneth' profile is displayed, showing contact information for Mr. Kenneth Able Jr and Susan Jones. The 'PNR Builder' section for 'Able Jr/Kenneth' is also shown, containing the same contact information and additional details like 'Marketing Codes: 28', 'Primary Agent: Beth Vollmar', and 'Created: 2/12/12'. The 'PNR Entries' section is visible on the right. At the bottom, there are buttons for 'CANCEL', 'GDS SELECTION', 'REFRESH', 'REVIEW', and 'SEND TO PNR'. The 'SEND TO PNR' button is circled in red. A red arrow points from the 'PNR' button in the 'Profiles' section to the 'SEND TO PNR' button in the 'PNR Builder' section.

Steps for successfully using Merge to PNR

1. Open a PNR on your computer. You may start checking availability and actually have a reservation ready in the PNR, but when it is time to add client name and address information, toggle into **ClientBase**. (Some agencies like to start in **ClientBase**, Merge to PNR, and then toggle into the PNR to check availability, and create reservation.)
2. Search to find the client's profile. To Merge to PNR from the Results Screen, click the action menu icon (gear) in Profile Manager, and **Merge to PNR**. (If the client's profile is not in the system, create one.)



OR: If you are inside the profile, update any address, phone and Email information, and click **PNR** in the menu bar.



3. First time users select the platform to use to send profile information to the GDS, and download the platform applet. The very first time you use the Merge to the PNR feature, you are presented with a screen from which to pick this platform one time only:

Reservation Systems		
Name	Clipboard	API
SABRE	<input type="radio"/>	<input type="radio"/>
Amadeus	<input type="radio"/>	<input type="radio"/>
Apollo	<input type="radio"/>	<input type="radio"/>
Galileo	<input type="radio"/>	<input type="radio"/>
Worldspan	<input type="radio"/>	

Unless you are using Worldspan, you are using an API (Application Protocol Interface). Select the appropriate platform and click **Next**. For users selecting an API platform, an applet is downloaded on your computer so that PNR data can integrate with your workstation:

Important Note: Make sure to check off **Always trust content from Trams Products and Services**. That way you won't see this dialog every time you do a Merge to PNR. In the future whenever you delete cookies or files from your Internet Explorer, you will be asked again to download this applet.

4. After you have downloaded the applet (for API platform users only), you are prompted with a series of checkboxes in the PNR Builder Selection Screen.

< CANCEL
 GDS SELECTION
 REFRESH
 PREVIEW
 SEND TO PNR

5*AFter HOURS SERVICE CALL 800-555-1212
5*THANK YOU FOR CHOOSING JET SET TRAVEL
5.S*SAEV
5*PLEASE CALL BETH AT 310-555-1212 WITH ANY QUESTIONS
5*FOR EMAIL ME AT BETH@JETSETTRAVEL.COM
5/MR KENNETH ABLE JR\$5/4563 MAPLE TREE AVE\$5/STERLING HEIGHTS MI 48312
5.S*AN4195553152

ADDITIONAL ENTRIES

Profile Entries

Bill To Address
☒ 5/MR KENNETH ABLE JR\$5/4563 MAPLE TREE AVE\$5/STERLING HEIGHTS MI 48312

Ship To Address
☐ 5DL-MR KENNETH ABLE JR\$5DL-4563 MAPLE TREE AVE\$5DL-STERLING HEIGHTS MI 48312

E-mail Address
☐ PE#KENANDSUE@SAMPLE.COM#

Interface ID
☒ 5.S*AN4195553152

Traveler Entries
☐ Able Jr/Kenneth (Primary)
☐ Jones/Susan (Spouse)
☐ Able/Jon (Son)
☐ Able/Abigail (Daughter)

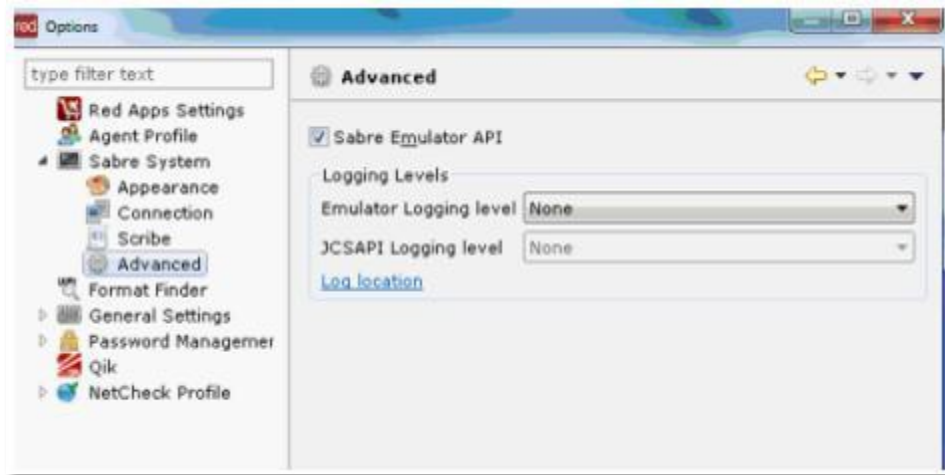
Branch Entries

After hours

Scroll down to select everything you need including travelers and credit card/frequent flyer information. The gray area recaps (previews) entries which have been setup by the database administrator to always move into the PNR. Select the information you want to move to a PNR by scrolling down and checking or unchecking any optional entries. Click **Cancel** to abort the Merge to PNR process, **Refresh** to see an edited version of the gray recap screen at the top of the selection screen, or **Preview**.

5. Clicking **Preview** takes you to a PNR screen where you can edit and get a full-page preview of any entries you have approved. The screen displays all information in the exact format that it will land into your current PNR. Information on this screen can be modified, but does not permanently update your **ClientBase** profile.
6. Pressing **Send to PNR** does the following depending on your CRS:
 - a. **Sabre Red Workspace, APS, Vista, and Apollo/Galileo Users:** When clicking Finish, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your CRS, hit Display All and view the updated PNR.
 - b. **Amadeus Users:** The PNR Import for Amadeus takes air, car, hotel and rail segments included in an Amadeus PNR and imports them into **ClientBase** Res Card reservation records. Amadeus uses the Amadeus Selling Platform (see the section about the traditional command pages in Amadeus) as you'll need that to work with merge/import. If you are on terminal services and CB is not then use the clipboard.
 - c. **Worldspan Users:** If characters to be pasted exceed 1000 characters, then copy to clipboard is broken into multiple packets. Upon clicking **Send to PNR**, the system prompts with a message, **1 of X of the PNR information is ready for pasting**. At this point the user must toggle to Worldspan and paste the first packet of information. If there are more packets, than the user must toggle back to **ClientBase**, click **OK**, and paste the remaining packets.
 - d. **Nexion Users:** Nexion offers an InternetView connection to the GDS's. Since it is Internet based, Merge to PNR via clipboard is the only GDS related function of **ClientBase** that works with it.

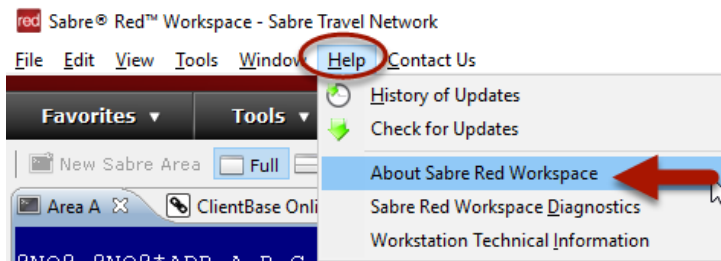
- e. **Sabre Red Workspace Users:** An API is the tool **ClientBase** uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the Sabre Emulator API emulator within Sabre Red. Select **Tools|Options|Sabre System|Advanced** and check **Sabre Emulator API**:



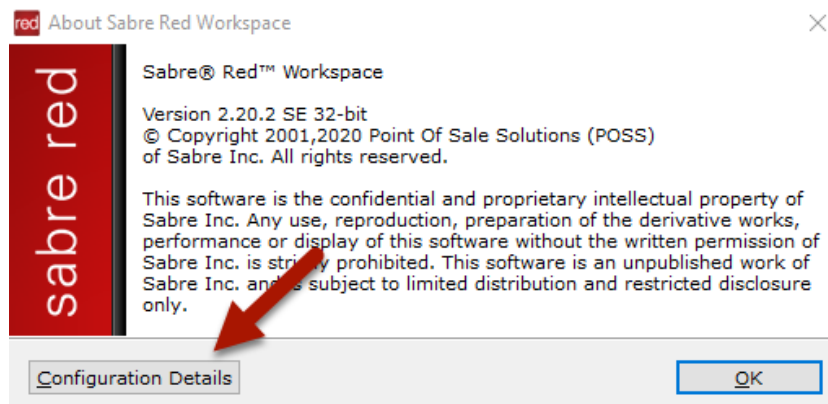
- f. **Sabre Red 360 Users:**

Step 1: Please review system requirements for [Sabre Red 360](#). (scroll to middle of page, click on Support tab and then click on Technical Requirements)

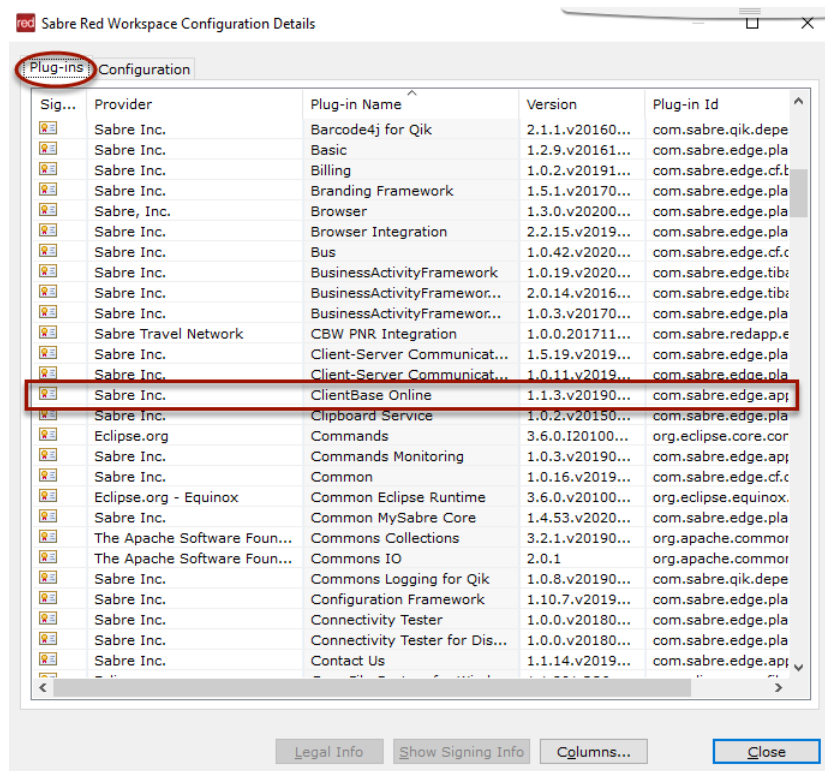
Step 2: In Sabre Red 360, verify you have the ClientBase Online Plug-in
Go to **Help** and click on **About Sabre Red 360**



Click on **Configuration Details**



Under the **Plug-ins** tab, verify that **ClientBase Online** is listed

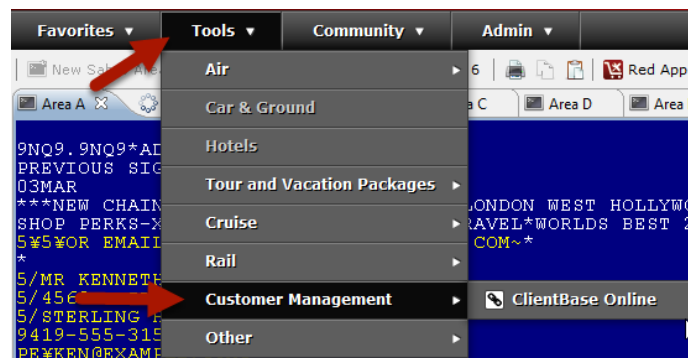


If the ClientBase Online plug-in is not found in your list, go to **Help** and click on **Check for Updates**. After updates, restart Sabre Red 360 and check again.

Step 3: Installing Active X Controls for the Merge to PNR and PNR Import features is no longer necessary, however, you will need to access ClientBase Online from within Sabre Red 360 to use the ClientBase Merge to PNR and PNR Import features. All other ClientBase Online functionality remains available via Internet Explorer.

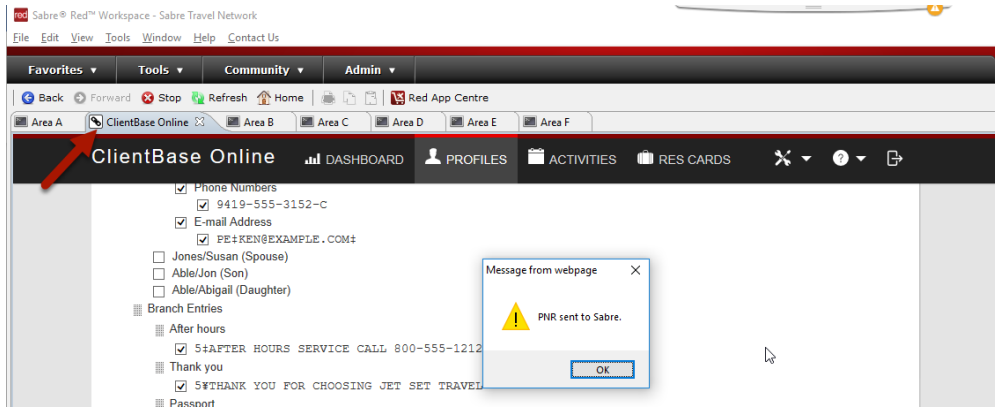
To launch ClientBase Online from Sabre Red 360:

From the black toolbar, select **Tools > Customer Management > ClientBase Online**.



Reminder: Sabre SSO (single sign on) is not available for ClientBase Online at this time. Be sure to use your assigned ClientBase Online PCC when logging in which may be different than the Sabre PCC you log in with.

Step 4: Follow the usual steps in ClientBase for Merge to PNR and PNR Import.



GDS Selection Link

If you need to change the GDS platform with which you are working, click the **GDS Selection** link. You are prompted to download a new applet if applicable.

Additional Entries Link

Within each PNR Entry or PNR Rule that is set to **Always Move**, an option is included called "Display on Selection Screen". The PNR Selection Screen is the screen that appears when you use the Merge to PNR feature and allows you to select the specific profile data to be included and sent to the current PNR. For PNR entries that should always move regardless of the profile or PNR, this **Display on Selection Screen** can be unchecked so that the Selection Screen is less complicated for the agent to review. Any of these entries that have not been designated to display on the selection screen can be viewed, if desired, by clicking **Additional Entries**.