

Save Time and Duplication with Merge to PNR

No more multiple entries or databases! *ClientBase Windows* provides the ability to move customer information (maintained in the *ClientBase Windows* 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 will 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: Michael Blue calls your agency to book some flights to Paris. You first locate Michael's profile in your marketing database *(ClientBase Windows)* 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.





Steps for successfully using Merge to PNR

- 1. The first step in using the Merge to PNR feature is to locate the profile you want to merge with your CRS. When merging information into your CRS, you have several choices. Merge the information to PNR from the Query results screen by:
 - a. Highlighting the desired profile and clicking the toolbar CRS/PNR icon or clicking the menu item Merge **To > PNR**, or;
 - b. Double-clicking the desired profile to enter the profile folder. From within the profile, access the same toolbar CRS/PNR icon to start the move to PNR.



- 2. After you have clicked on the Merge to PNR icon in the toolbar, notice a series of check boxes in the PNR builder selection screen. The first time you do a Merge to PNR, change the Reservation System to yours. It'll save this next time you come in.
- Select the information you want to move to a PNR by checking any optional entries. In the Traveler Entries column, these should appear in alphabetical order for commercial clients and in the order they are listed as Travelers for leisure clients. If you want to change the order in the PNR, however, simply use your mouse to drag the traveler into the desired position in the column.
- 4 Click Preview or Send to PNR.



- a. The Preview screen displays all information in the exact format that it will land into the current PNR. Information on this screen can be modified but does not permanently update the ClientBase Windows profile.
- b. Clicking 'Send to PNR' does the following depending on your CRS:

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.



Amadeus Users:

1. Your ClientBase Administrator or Manager will need to update your Global Default settings by going to Global Defaults > Merge to PNR Defaults > PNR Settings. On the GDS drop-down menu select Amadeus and then change the Use API selection to Use Clipboard.

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Alternatively, individual users can go to Workstation Defaults > Environment > Merge to PNR Settings, and for Amadeus change the selection from Use Global Settings to Use Clipboard.

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2. Open the profile you want to send to Amadeus, click on the PNR icon in the toolbar, and then select Amadeus from the Connect To drop-down menu.

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3. Select the profile data you want to merge.

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4. Click on Preview to review the formats for accuracy. Traveler name entries must be in the first send before any associated entries can be sent. Name fields must be present in the PNR prior to sending specific passenger associated formats such as TSA information. The complete merge can typically be completed in 2 or 3 steps.

5. Select 'Send to PNR'. This will place the profile information in the appropriate Amadeus formats on your clipboard. ClientBase will present a message that the information for your PNR is ready for pasting.

| Information | × |
|-----------------------------|------------|
| PNR Information is ready fo | r pasting. |
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6. On the command page in Amadeus, right-click and paste your data or enter Ctrl V to paste.





Sabre Users:

Verify /setup Integration between CBW and SR360.

Step 1: Please review system requirements for both Sabre Red 360 and ClientBase Windows:

(scroll to middle of page, click on Support tab and then click on Technical Requirements)

Step 2: Verify you have the latest version of ClientBase Windows installed on your server. To download the latest update, open ClientBase Windows on your server, go to Help > Check for Updates, and verify that you are on version 4.06.00 build 26 or higher (current version is v 4.08). Alternatively, visit the <u>Trams Support page</u> to download the latest update.

Step 3: The new Sabre Red App CBW PNR Integration will need to be assigned to each agent's Sabre EPR. Order and <u>download</u> the CBW PNR Integration App from the Sabre Red App Centre.

* Note: If needed it can be Ordered on the Sabre Redapp Centre by an authorized user.

Once the Red App is installed, it will automatically launch with Sabre Red 360. It will not be visible from the Helper App menu, but can be viewed under Contact Us > Application Vendor Support

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Step 4: Update API settings in ClientBase Windows using system administrator credentials.

Go to Global Defaults > Merge to PNR Defaults > PNR Settings



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Make sure your GDS selection displays Sabre.

Change to "Use NSRW 3.0 API" from drop down selection.

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| | | Credit Card Rules Frequent Flyer Rules Hotel Program Rules | |
| | | Car Program Rules Profile Miscellaneous Rules | - |
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Worldspan Users:

Leave Use Clipboard checked.

When pressing **Finish**, the previewed information is placed in the Windows clipboard.

If this occurs successfully, a confirming message appears.

Use the normal Windows command (<Alt+Tab>) to toggle into your CRS.

Retrieve or display the appropriate PNR and paste what was placed in the clipboard using either <Ctrl+V>, <Shift+Insert>, or Edit/Paste, then press Enter to transmit the entries.