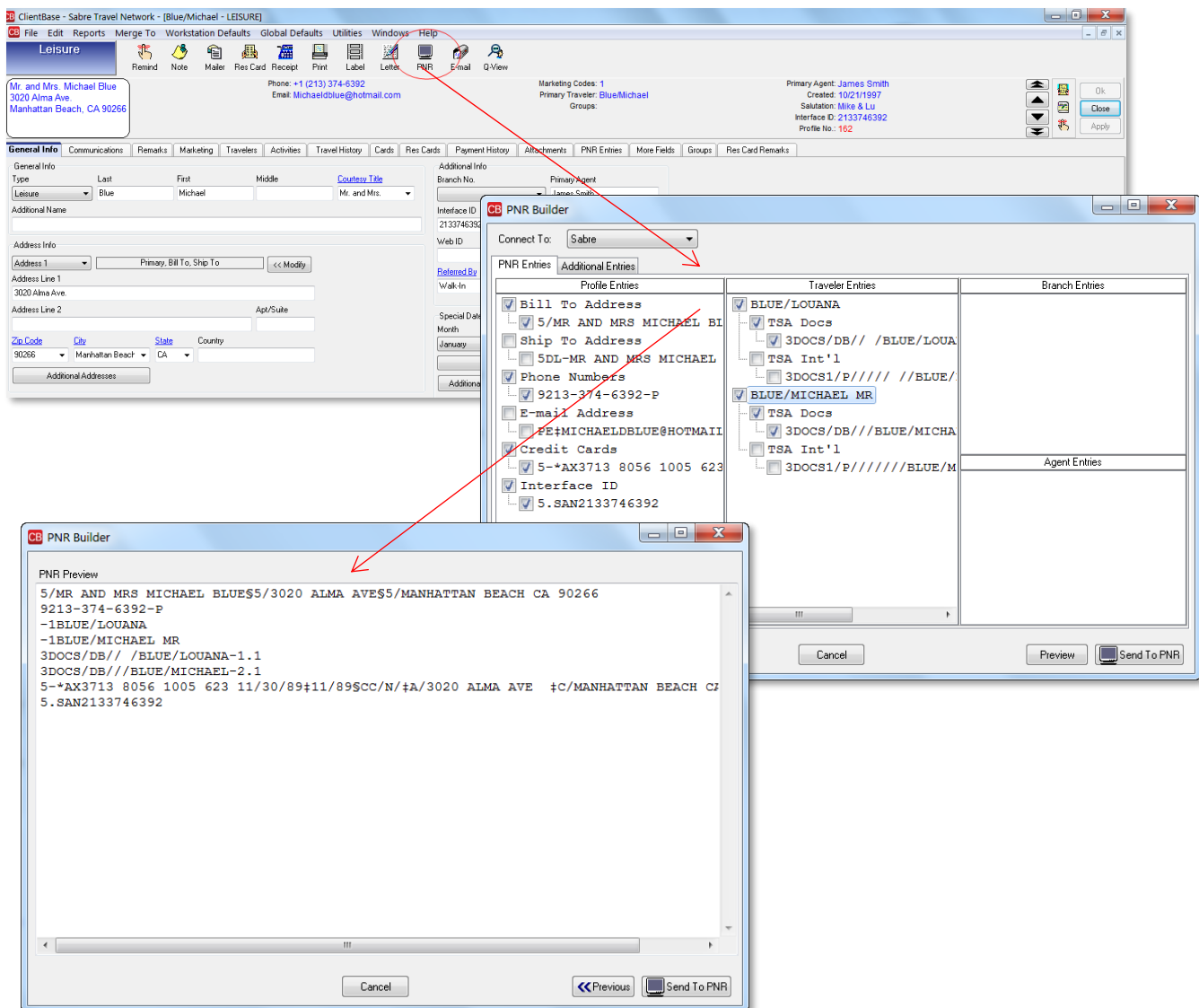


Save Time and Duplication with Merge to PNR

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.



The screenshot illustrates the process of merging customer information from the *ClientBase Windows* profile into a PNR using the *PNR Builder* tool.

ClientBase Windows (Top Left): Displays the profile for Mr. and Mrs. Michael Blue, 3020 Alma Ave, Manhattan Beach, CA 90266. The contact information includes Phone: +1 (213) 374-6392 and Email: Michaelblue@hotmail.com. The profile is linked to a Primary Agent, James Smith, and a Primary Traveler, BlueMichael.

PNR Builder (Top Right): Shows the process of connecting to Sabre. The **Profile Entries** section lists the following information to be merged:

- Bill To Address
- 5/MR AND MRS MICHAEL BLUE
- Ship To Address
- 5DL-MR AND MRS MICHAEL BLUE
- Phone Numbers
- 9213-374-6392-P
- E-mail Address
- EE+MICHAELBLUE@HOTMAIL.COM
- Credit Cards
- 5-*AX3713 8056 1005 623
- Interface ID
- 5.SAN2133746392

The **Traveler Entries** section lists the following information to be merged:

- BLUE/LOUANA
- TSA Docs
- 3DOCS/DB// /BLUE/LOUANA
- TSA Int'l
- 3DOCS1/P///// /BLUE/
- BLUE/MICHAEL MR
- TSA Docs
- 3DOCS/DB// /BLUE/MICHAEL
- TSA Int'l
- 3DOCS1/P///// /BLUE/M

PNR Preview (Bottom Left): Shows the resulting PNR structure:

```
PNR Preview
5/MR AND MRS MICHAEL BLUE$5/3020 ALMA AVE$5/MANHATTAN BEACH CA 90266
9213-374-6392-P
-1BLUE/LOUANA
-1BLUE/MICHAEL MR
3DOCS/DB// /BLUE/LOUANA-1.1
3DOCS/DB// /BLUE/MICHAEL-2.1
5-*AX3713 8056 1005 623 11/30/89+11/89$CC/N/#A/3020 ALMA AVE +C/MANHATTAN BEACH CA
5.SAN2133746392
```

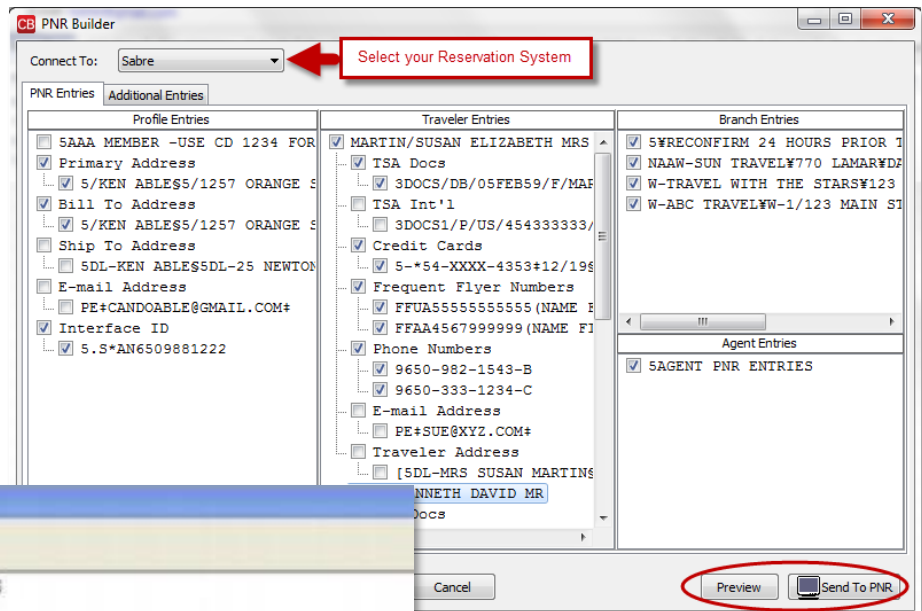
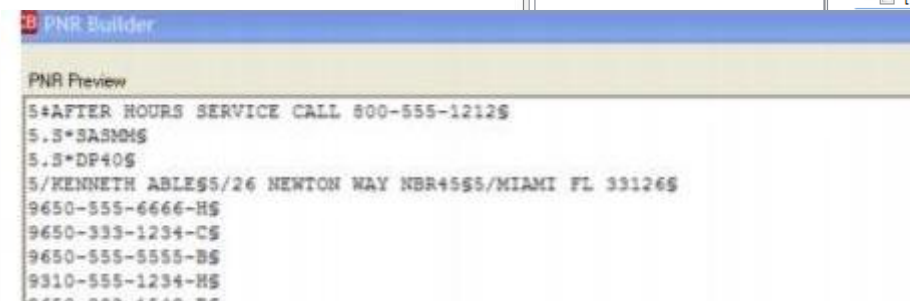
The **PNR Builder** window includes buttons for **Cancel**, **Preview**, and **Send To PNR**.

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.
3. 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.

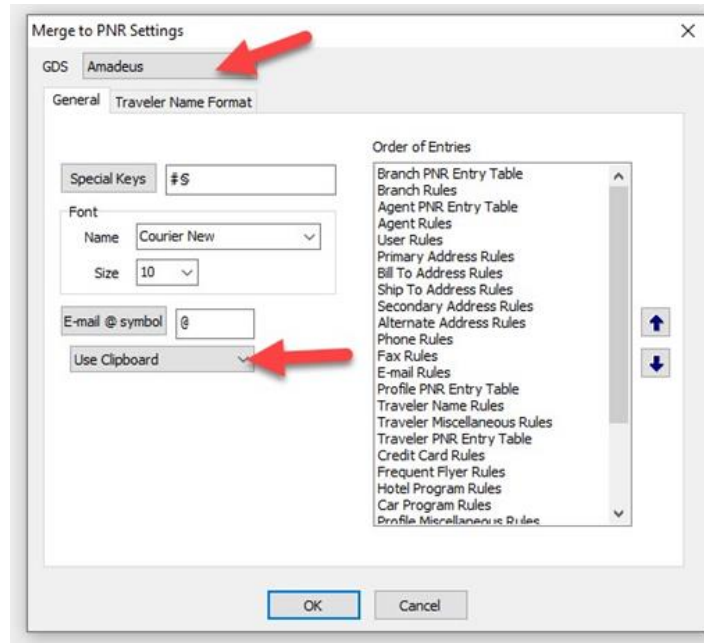
- a. The Preview screen displays all information in the exact format that it will land into the current PNR. Information on this screen can be modified but does not permanently update the *ClientBase Windows* profile.
- b. Clicking 'Send to PNR' does the following depending on your CRS:

Apollo/Galileo Users:

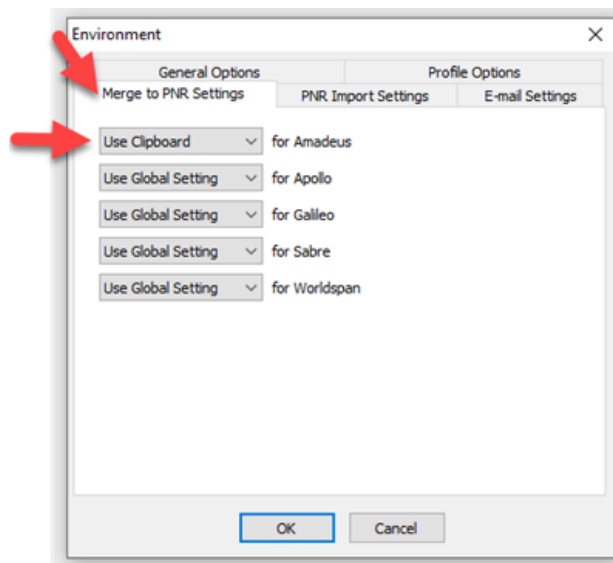
When clicking Finish, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your CRS, hit Display All and view the updated PNR.

Amadeus Users:

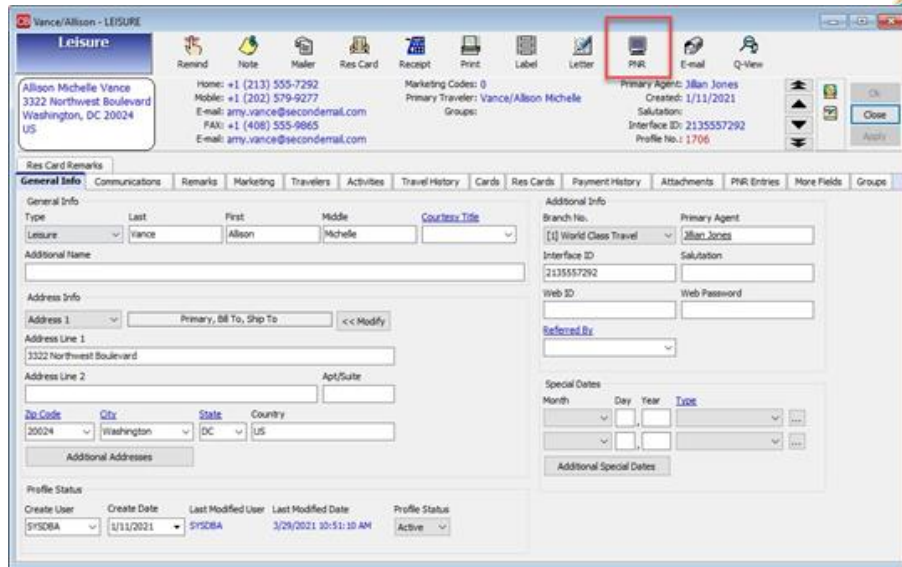
1. Your ClientBase Administrator or Manager will need to update your Global Default settings by going to Global Defaults > Merge to PNR Defaults > PNR Settings. On the GDS drop-down menu select Amadeus and then change the Use API selection to Use Clipboard.



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.



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.



Leisure

Remind Note Mailer Res Card Receipt Print Label Letter **PNR** E-mail Q-View

Allison Michelle Vance
3322 Northwest Boulevard
Washington, DC 20024
US

Home: +1 (213) 555-7292
Mobile: +1 (202) 579-9277
E-mail: amy.vance@secondemail.com
Fax: +1 (408) 555-9865
E-mail: amy.vance@secondemail.com

Marketing Codes: 0
Primary Traveler: Vance/Allison Michelle
Groups:

Primary Agent: Allan Jones
Created: 1/11/2021
Salutation:
Interface ID: 2135557292
Profile No.: 1706

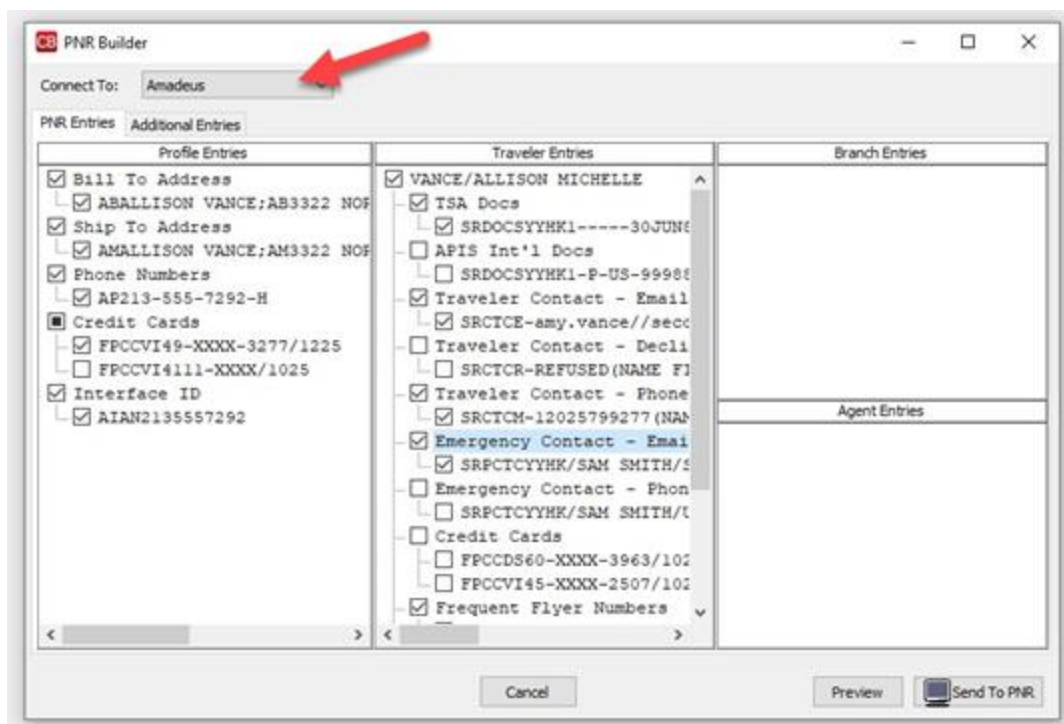
Res Card Remarks

General Info Communications Remarks Marketing Travelers Activities Travel History Cards Res Cards Payment History Attachments PNR Entries More Fields Groups

General Info
Type: Leisure Last: Vance First: Allison Middle: Michelle Courtesy Title:
Additional Name:
Address Info
Address 1: Primary, Bill To, Ship To << Modify
Address Line 1: 3322 Northwest Boulevard
Address Line 2: Apt/Suite:
Zip Code: 20024 City: Washington State: DC Country: US
Additional Addresses:
Profile Status
Create User: SYSDBA Create Date: 1/11/2021 Last Modified User: SYSDBA Last Modified Date: 3/29/2021 10:51:10 AM Profile Status: Active

Additional Info
Branch No.: [1] World Class Travel Primary Agent: Allan Jones
Interface ID: 2135557292 Salutation:
Web ID: Web Password:
Referred By:
Special Dates
Month: Day: Year: Type:
Additional Special Dates:

3. Select the profile data you want to merge.



PNR Builder

Connect To: Amadeus

PNR Entries Additional Entries

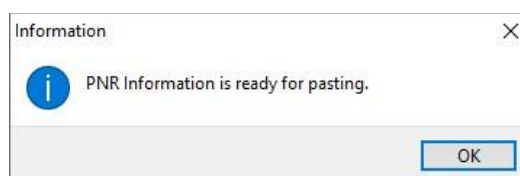
| Profile Entries | Traveler Entries | Branch Entries |
|--|---|----------------|
| <input checked="" type="checkbox"/> Bill To Address | <input checked="" type="checkbox"/> VANCE/ALLISON MICHELLE | |
| <input checked="" type="checkbox"/> ABALLISON VANCE;AB3322 NOF | <input checked="" type="checkbox"/> TSA Docs | |
| <input checked="" type="checkbox"/> Ship To Address | <input checked="" type="checkbox"/> SRDOCSYYHK1-----30JUNE | |
| <input checked="" type="checkbox"/> AMALLISON VANCE;AM3322 NOF | <input type="checkbox"/> APIS Int'l Docs | |
| <input checked="" type="checkbox"/> Phone Numbers | <input type="checkbox"/> SRDOCSYYHK1-P-US-99988 | |
| <input checked="" type="checkbox"/> AP213-555-7292-H | <input checked="" type="checkbox"/> Traveler Contact - Email | |
| <input checked="" type="checkbox"/> Credit Cards | <input checked="" type="checkbox"/> SRCTCE-amy.vance//secc | |
| <input checked="" type="checkbox"/> FPCCVI49-XXXX-3277/1225 | <input type="checkbox"/> Traveler Contact - Decli | |
| <input checked="" type="checkbox"/> FPCCVI4111-XXXX/1025 | <input type="checkbox"/> SRCTCR-REFUSED(NAME FI | |
| <input checked="" type="checkbox"/> Interface ID | <input checked="" type="checkbox"/> Traveler Contact - Phone | |
| <input checked="" type="checkbox"/> AIAN2135557292 | <input checked="" type="checkbox"/> SRCTCM-12025799277 (NAM | |
| | <input checked="" type="checkbox"/> Emergency Contact - Email | |
| | <input checked="" type="checkbox"/> SRPCTCYHKK/SAM SMITH/S | |
| | <input type="checkbox"/> Emergency Contact - Phon | |
| | <input type="checkbox"/> SRPCTCYHKK/SAM SMITH/t | |
| | <input type="checkbox"/> Credit Cards | |
| | <input type="checkbox"/> FPCCDS60-XXXX-3963/102 | |
| | <input type="checkbox"/> FPCCVI45-XXXX-2507/102 | |
| | <input checked="" type="checkbox"/> Frequent Flyer Numbers | |

Agent Entries

Cancel Preview Send To PNR

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.

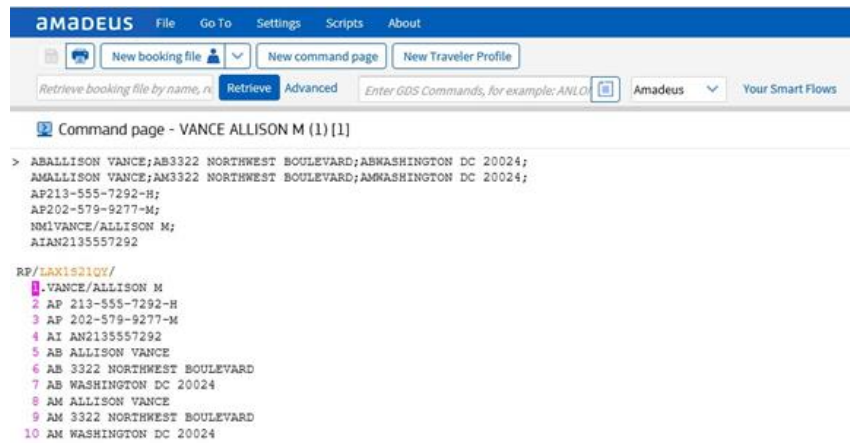


Information

PNR Information is ready for pasting.

OK

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](#):

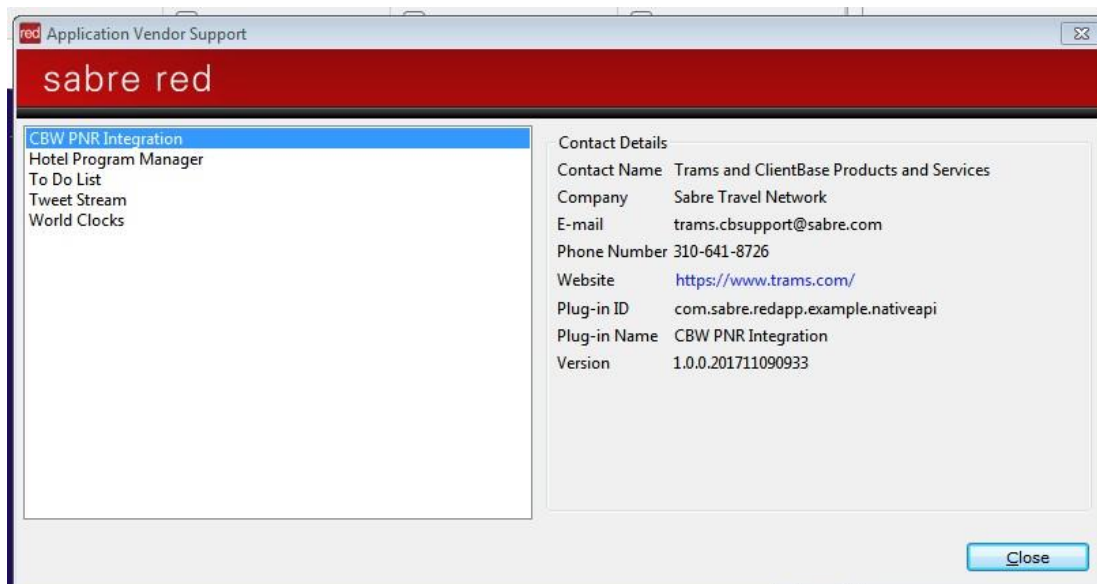
(scroll to middle of page, click on Support tab and then click on Technical Requirements)

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 [Trams Support page](#) 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 [download](#) the CBW PNR Integration App from the Sabre Red App Centre.

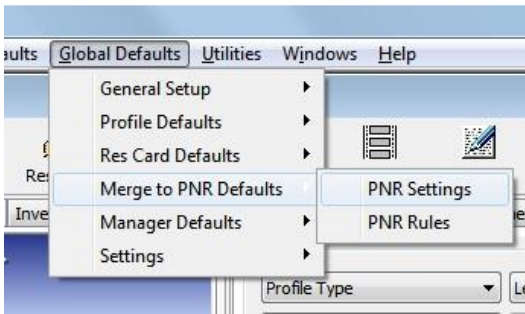
** Note: If needed it can be Ordered on the Sabre Redapp Centre by an authorized user.*

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



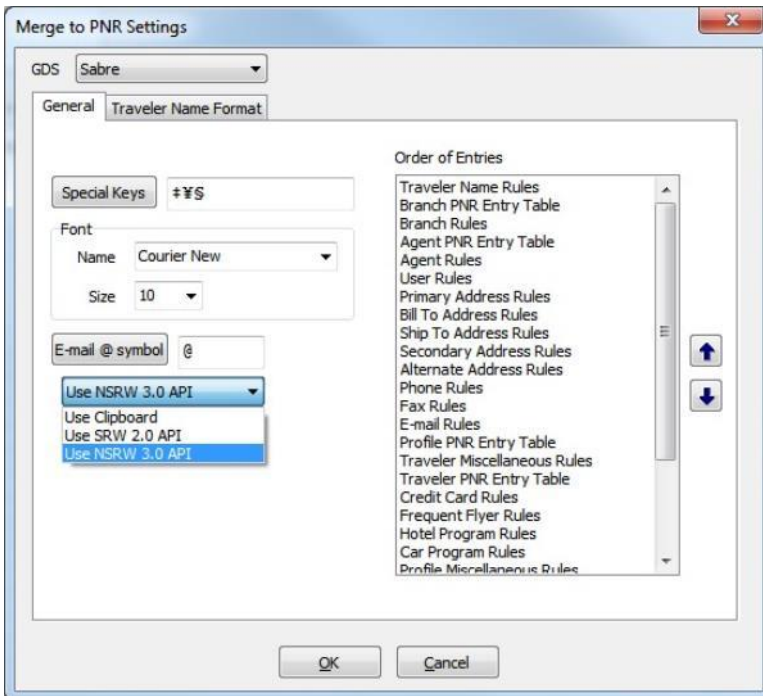
Step 4: Update API settings in ClientBase Windows using system administrator credentials.

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



Make sure your GDS selection displays Sabre.

Change to “Use NSRW 3.0 API” from drop down selection.



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.