



Outtask Guides



Cliqbook User Guide

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Cliqbook User Guide

Getting Started

Welcome to Cliqbook, Outtask's Travel solution. Cliqbook provides a simple way to book your business travel online. This guide provides information on:

- setting up and editing your travel profile
- booking flight, car rental, limo and/or hotel reservations online
- finding helpful travel information

Not every company uses every feature in Cliqbook. Make sure to always check your organization's policy regarding how you use Cliqbook, including reviewing the current travel policy. For some users, this information is available on the Travel Center screen.

Once you are logged into Cliqbook, you will see the **Travel Center** page.

Some elements of this page include:

- tabs where you enter information for your travel request
- links to view your profile, saved templates, your travel policy, or travel tools.
- information from your travel department or agency in Company Notes

For travel assistants or arrangers, you will also see a drop-down list of your travelers near the top right corner of the page.



Select a different name to book a trip for that person, view or update the profile, or view a list of booked trips.

For more information about travel assistants or arrangers, see [Assistants or Arrangers](#).

The first time you log in, you may be prompted to change your password. Make sure to check your travel policy for instructions on changing your password. To change it in Cliqbook, see [Additional Profile Options](#).

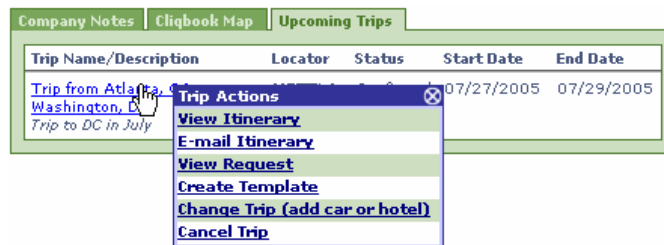
Upcoming Trips

The upcoming trips tab shows a list of trips. For older trips, see the Trip Library.

The information that appears for each trip is:

- **Trip name and Description** - whenever you submit a trip, you can give it a name and an additional description.
- **Locator** – the record locator for this trip.
- **Status** - always note the status of the flight, typically **Confirmed** or **Ticketed**. Organizations that use approvals will see the approval status of the trip. If you have the ability to hold a trip, you will see the last ticketing date and time in the status column as well.
- **Start and End Date** - the departure and return dates for the trip.

Click the name of an upcoming trip for any of the following options:



- **View Itinerary** – view your Cliqbook itinerary. For some customers, you can view itineraries for trips booked outside of Cliqbook through your agency. From the travel itinerary, you can change your trip, print your itinerary, email the itinerary, or open the trip as a Microsoft Outlook appointment. Some airlines also give the option to go right to on-line check in from the travel itinerary.



- **Email Itinerary** – send the itinerary to the email address or addresses in the profile.
- **View Request** – see the Cliqbook request, including the status. If the status is not Ticketed, you can usually withdraw the request.
- **Create Template** – create a template if this is a recurring trip. See [Travel Templates](#) for more information.
- **Change Trip** – choose to change or cancel your car rental or hotel reservation. For some customers, you may also be able to add or modify your car service or limousine reservation, or change your airfare. Check your travel policy for more information. For more information, see [Change Trip](#).
NOTE: For any non-GDS ticketed flight, you must contact the Web site or vendor directly.
- **Cancel Trip** – for agency-booked trips that do not have a **Ticketed** status, you can attempt to cancel the itinerary. This link will not appear if the trip has been ticketed, and you may have to contact the agency for changes to airfare.

Travel Profile

The first step before booking your first trip is to update your travel profile. Your profile allows you to store information relevant to travel. For most customers, when you save changes to your profile in Cliqbook, the same changes are saved to your profile at the travel agency.

Fields marked with an orange **Required** must be completed in order to save your profile. **[Required]**

Some customers have custom fields on this page. Please check with your travel department if you need information on custom profile fields.

The **edit**  and **delete**  icons let you edit or delete existing information. This is consistent throughout the profile.

To access and modify your profile, or verify information imported into Cliqbook, follow these steps:

- 1 Click the **Profile** link.

If you are a travel arranger, choose whose profile you would like to edit at the top of the profile page. You can also select the traveler's name from the Travel Center page and click the **Profile** link.

- 2 Scroll through this page to verify existing information, or click the links to navigate to another part of the page.

NOTE: Name fields - make sure that the first and last name is exactly the same as the ID used at the airport.

- 3 Enter address information. The country you select in the address fields will determine the default map that appears in Cliqbook.

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- 4 Telephone information is required so the agents can contact you or the traveler. For most customers, at least a **Work Phone** is required.
 - 5 There are three fields for email addresses. Cliqbook will send a confirmation email once a trip is reserved to the first email address, and travel agents will also use this email address to send a final ticketed email or invoice.

If you want to use additional email addresses (for instance, a home address, an assistant, or a coworker) make sure to place a check in front of the additional email address field. Cliqbook will then send the confirmation email to the additional addresses as well.

- 6 If your organization uses the voice-activated features of Cliqbook, please see [Voice](#) for more information.
- 7 Enter **Emergency Contact** information.
- 8 Use the **Travel Preferences** section to enter or edit:

- Any discount membership information.
- Your air, car, and hotel preferences.

Air Travel Preferences – Cliqbook will attempt to place you in the best seat available based on your preferences.

Hotel Preferences – make sure to place a check next to any accessibility needs or preferences.

Car Rental Preferences – the car rental type you select here becomes the default when you search for a car. Make sure to stay within your travel policy.

- Your preferred departure airport.
- Any medical alerts.
- Your frequent traveler memberships. Click the **Add a Program** link to enter up to five memberships at a time. When adding a membership: Make sure that the name for the membership matches the name in your profile, including middle initial.

Enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters, or the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system.

Select the type of membership first, air, car, or hotel. This will determine the list of vendors that appear.

Use the **Search this Vendor** checkbox to prioritize the search in Cliqbook. Keep in mind that your travel policy will override your individual vendor preferences.

- Edit favorite hotels. This feature is not used by every customer.
 - Your passport information.
- 9 Use **Assistants & Travel Arrangers** to give other Cliqbook users the ability to book travel for you, view and modify your profile, or book trips for you in Cliqbook. See [Travel Assistants and Arrangers](#) for more information.

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- 10** Use the **Credit Cards** area to add credit cards you would like to use to pay for your travel.

Some organizations use "ghost" cards, business travel accounts ("BTA" cards), or other centrally-billed payment methods. These payment methods usually do not appear in this section. If you are assigned to use a centrally-billed payment method, it will be indicated when you reserve your flight. Check your travel policy for more information.

Cliqbook recommends that you set a credit card as the default for air, car, and hotel travel. This way, the system will not prompt you to choose a credit card.

Make sure that the name on the credit card, the credit card number, the expiration date, and the billing address are all correct on this screen.

- 11** Make sure to **Save** your profile when you are finished either updating or verifying the information. If you do not automatically return to the Travel Center page, click the **Home** link.

NOTE: There are several **Save** buttons on the profile page. It is only necessary to save once as every Save button saves the entire profile.

Additional Profile Options

Several links on the left side of the profile page allow you to modify your information in Cliqbook. They are found under the **Other Settings** heading.

System Settings

Default Language – choose your default language from the drop-down list. Your language for Cliqbook can be different from your company default.

Time Zone – select a time zone. Cliqbook sends an email when you finish booking a trip, which includes a Microsoft Outlook Calendar attachment. This attachment will reflect your chosen time zone.

Day/Time/Week settings – not currently used in Cliqbook.

Number Format – choose how to display numbers in Cliqbook.

Country/Currency – results for travel will appear in the currency determined by the travel agency, however, some car and hotel results will be converted to the selected currency.

Outtask Home Page – the page that appears when you click the **Home** link at the top of the page. For Cliqbook customers, this is usually the Travel Center (labeled Outtask Travel).

Rows per page – only used by Cliqbook Administrators.

Approval Notification Emails

Cliqbook will notify you under certain circumstances, listed below. If your company does not use approvals, you will most likely not use these email options.

Send an email every time something is put in or removed from my approval queue – if you approve Cliqbook requests, place a check in this box to be notified whenever you have a request to approve.

Send a daily summary of items in my queue – Cliqbook will send a daily summary of requests that are awaiting your approval.

Let me know when one of my requests is approved or denied – when you submit requests, Cliqbook will automatically notify you when they are approved or denied.

Setup Checklist – click this link to see if there are steps you are required to complete at this time. Not used by most customers.

Change Password – click this link to change your password at any time.

Privacy Statement – click this link to read Outtask’s privacy policy.

System Email Settings – this link may be available for some users. It is not related to Cliqbook.

Travel Vacation Reassignment – click this link to temporarily reassign Cliqbook approvals or notifications. Please read the instructions on this page carefully. This feature is only used if you approve trips in Cliqbook.

Follow these steps to reassign your Cliqbook approvals:

- 1 Click the **Edit** button.
- 2 Type in the name of the manager who will handle your approvals and click **Search**.
- 3 Click **Select** next to the name of the approver.
- 4 Click **Submit** to reassign any new approvals to this person.

NOTE: Cliqbook will not reassign any existing approvals. If you have trips that you are unable to approve, please contact a Cliqbook Administrator or your travel manager to have these requests reassigned.

I’m Assisting... – this option is available for some users, and allows you to designate yourself as someone else’s assistant. The person you choose will receive an email once you click Save. For more information, see [Travel Assistants or Arrangers](#).

Travel Center

From the Travel Center, you can launch the Travel Wizard, access other travel information, or view trips that are completed or in process.

The links in the grey bar in the application help you navigate through the system. Not all links will appear for every customer.

- Click **Home** to return to the Travel Center
- Click **Templates** to view personal or company templates. Refer to [Templates](#) for more information.

- Click **Policy** to see specific information about your use of Cliqbook. Check with your travel department for your organization's full travel policy.
- Click **Profile** to access or modify your profile as described in the [Travel Profile](#) section. If you are an assistant or arranger, you can also use this link to access your traveler's profile information.
- Click **Tools** to see contact information, international travel help, maps, and other helpful travel links.
- Click **Meetings** to access the Cliqbook Meeting Center. This link is optional and will not appear for every customer.

Book a Trip

The tabs on the left side of the Travel Center page let you enter information for booking a trip.

If you have a flight, use the **Flight** tab. You can add a car or a hotel from this tab. If you have other segments to add, such as more than one hotel or a limo, you can add those from the Itinerary.

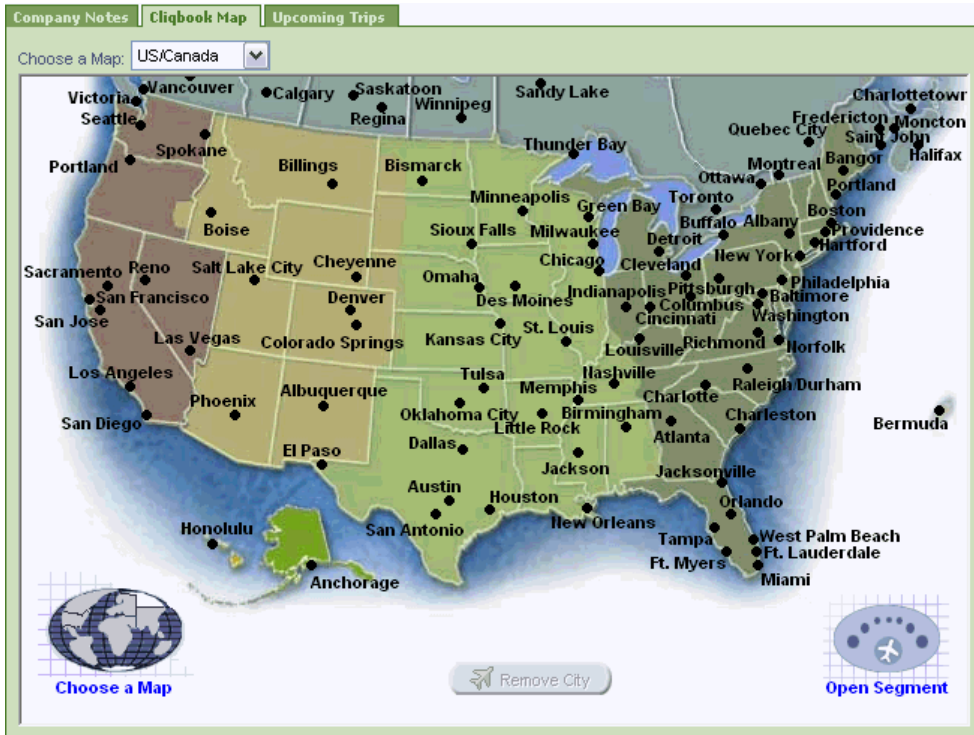
If you have a **Car**, **Hotel**, or **Limo** to book without airfare, use the corresponding tabs.

You can also use the **Flight Status** tab to check the status of a flight. Enter the cities, date, and airline and you can see arrival times for the flight.

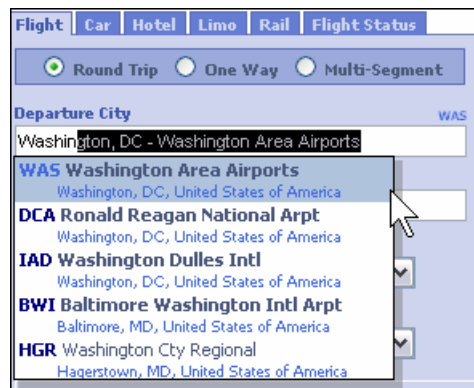
If you are set up as a travel arranger, select the person for whom you would like to book travel before you start entering your travel request information.

Flight Tab

On the Flight tab, choose the type of flight, Round Trip, One Way, or Multi Segment. You can then either type in your **Departure** and **Return** cities city, or use the Cliqbook Map tab on the right to select cities.



When you type in a city, airport name, or airport code, Cliqbook will automatically search for a match.



Choose the airport you want, or choose the **Area Airports** option (if available) to search multiple airports.

If you use the map page:

- Click on a city to fly out of an airport in or near that city.

- To fly from an airport in a city not on the map, click anywhere in that state or region. A list of all the airports will appear, and you can choose the preferred departure airport.
- To make travel arrangements outside of your home country, choose a continent from the globe at the bottom left to change the map. You will then be able to choose a country and city. You can also use the menu near the top left of the tab to select which map you would like to see.
- For multi-segment flights continue choosing cities, including your return city, until you are finished.
- If you wish to arrive in one airport and then return from a different airport, select your city pair and then click the **Open Segment** icon. This will put an open segment into your itinerary, so you can choose a different airport for your return flight.
- Click the **Remove City** button to take a city out of your itinerary.

Click in the **Departure** and **Arrival** date fields to select dates from the calendar. Choose times, and also your time range. Cliqbook always searches before and after the time you select.

If you need a car at the airport, place a check in the **Pickup/Dropoff car at airport** box. Some organizations additionally allow you to **Automatically reserve this car**, which lets you bypass seeing car results. Once you select your vendor and car type, a car is automatically added to your reservation.

If you need an off-airport car, or have other special requests, skip this step and you can add a car from the [Itinerary](#).

If you need a hotel, check **Find a Hotel**. Choose whether to search by airport, address, a company location (if provided by your organization), or a reference point or zip code. Once you choose how to search, enter the required details. You can also choose a range in miles or kilometers within which to search. For more information, see [Hotels](#).

If you have are staying at more than one hotel during your trip, or don't need a hotel for the entire length of your stay, skip this step and you can add a hotel from the [Itinerary](#).

Choose whether to search by **Best price** or **Best fit to schedule**.

- If you choose to search by schedule, Cliqbook will give you options for departure and return flights, and then will perform a search by price. See [Search by Schedule](#) for more information.

NOTE: If you want to see flights in fare classes other than Coach, you **MUST** search by schedule.




Choose to check the **Flights with/ no penalties (refundable)** box (if available) to search only fully refundable fares. You may also have the option to choose only flights without double connections.

Once you have entered all your information, click the **Search** button to open the wizard and see your flight results.

Search by Schedule

When you choose to search by schedule, you will see a list of outbound and return flights. Make sure to choose both your departure and return flights on this page. Prices do NOT appear on the Search by Schedule page; once you select your flights, Cliqbook will price the flights and you will be able to purchase the flight you chose, or a similar flight.

The following symbols will appear on this page. Cliqbook will usually show what these symbols mean when you hold your cursor over the symbol.









-  Indicates a company preferred carrier.
-  Allows you to see the seat map for this flight. See [Seat Maps](#) for more information.
- You can also hold your cursor over any airport code or airline name to see the full name for the airport or airline.
-  Indicates the flight you selected once you get to the next screen ([Choose a Flight](#)).
- There are also symbols that indicate a flight is a code share, is direct but has stops, or is sold out.

Choose a Flight

If you Search by Schedule, the Choose a Flight page will show up once you choose your flights and continue. If you search by price, you will go directly to the Choose a Flight page. Results appear on tabs on this page. Directly above the tabs will be a grid near the top of the screen.

Flight results come from your agency reservation system, and some companies additionally allow travelers to see selected direct purchase fares. Information on where the flight comes from appears when you select the flight.

Cliqbook shows all the available fares in a grid near the top of the screen:

Click on a column, row or cell in the grid below to filter your results.								Print 
All 50 results	 11 results	 7 results	 12 results	 2 results	 12 results	 2 results	 4 results	
Nonstop 41 results	217.90 8 results	217.90 5 results	156.90 12 results	156.90 2 results	186.90 12 results	226.90 2 results	0 results	
1 stop 9 results	140.10 3 results	142.60 2 results	0 results	0 results	0 results	0 results	417.80 4 results	

Each fare appears beneath the grid on a tab. You can sort or filter the tabs using the grid.

By default, all results will appear on the tabs beneath the grid. To filter the fares, click on the corresponding row, column, or cell in the grid.

To see all non-stop fares, click the **Nonstop** cell, and the tabs will only show non-stop fares.

Nonstop
[41 results](#)

To see all fares for a particular vendor, click that vendor cell and the tabs will only show fares for that vendor.


[12 results](#)

Cliqbook also gives you the ability to modify your search from this screen from the **Change Search** section on the left side of the screen.

Previous Searches	
Previous Searches	
<input type="button" value="Submit"/>	
Change Search	
From:	All Airports in New York ▼
To:	All Airports in Washingtc ▼
Depart date:	04/13/2005
Morning	▼ ± 2 ▼
Return date:	04/16/2005
Afternoon	▼ ± 2 ▼
<input type="button" value="Search"/>	

You can use the Change Search section to modify any of the following information for this flight:






- Airport – if the city has multiple airports, you can change the airport in the From or To fields.
- Depart or Return date – change either date in the corresponding field.
- Time – change the time range or select a more specific time window.
- Refundability – if your organization allows you to search for refundable fares, you can change the refundable status when you change your search.

Click **Search** to search again, and Cliqbook will show your new results. The **Previous Searches** section will retain the information for each search, so you can refer back to previous searches if you need to.

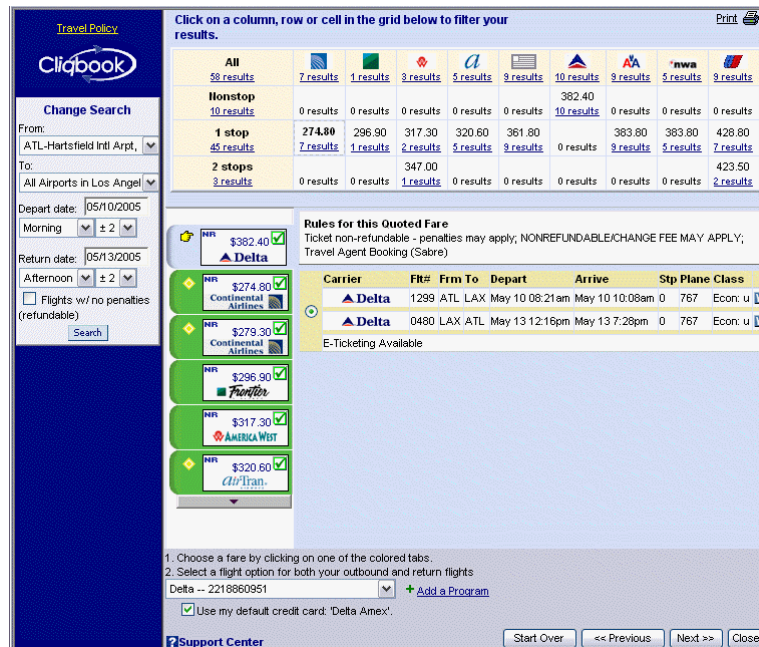
Cliqbook shows additional information about each fare on the tab, including:

- Blue tab - currently selected fare
- Green tab - fare within your company's policy
- Yellow tab - fare outside of policy that will require additional information
- Red tab - fare outside of policy that will require additional information and approval

NOTE: For more information on yellow and red tabs see [Company Policy](#).

-  Company preferred airlines
-  your frequent-flyer airlines
-  refundable fare
-  non-refundable fare
-  flights you selected on the [Search by Schedule](#) page.

When you move your cursor over a tab, you can view the itinerary for this fare. Click on the tab for details. Once you click the tab, it turns blue, and you can see details and options for the flights that are available at that fare.



The screenshot shows the Clickbook Travel Policy interface. On the left, there is a 'Change Search' section with fields for 'From' (ATL-Hartsfield Intl Arpt), 'To' (All Airports in Los Angel), 'Depart date' (05/10/2005), and 'Return date' (05/13/2005). Below these are options for 'Morning' and 'Afternoon' with time ranges, and a checkbox for 'Flights w/ no penalties (refundable)'. A 'Search' button is at the bottom of this section.


The main area displays a grid of search results. The grid has columns for 'All', 'Honstop', '1 stop', and '2 stops', each with a result count. Below the grid, there are several colored tabs representing different fare options from various airlines: Delta (\$382.40), Continental (\$274.80), Frontier (\$279.30), America West (\$296.90), and AirTran (\$320.60). Each tab has a checkmark and a small icon.

Below the tabs, there is a 'Rules for this Quoted Fare' section with a warning: 'Ticket non-refundable - penalties may apply; NONREFUNDABLE/CHANGE FEE MAY APPLY; Travel Agent Booking (Sabre)'. Below this is a table of flight options:

Carrier	Flt#	Frm To	Depart	Arrive	Stp	Plane	Class
Delta	1299	ATL LAX	May 10 08:21am	May 10 10:08am	0	767	Econ: u
Delta	0480	LAX ATL	May 13 12:16pm	May 13 7:28pm	0	767	Econ: u

Below the flight table, it says 'E-Ticketing Available'. At the bottom of the interface, there are instructions: '1. Choose a fare by clicking on one of the colored tabs. 2. Select a flight option for both your outbound and return flights.' There is a dropdown menu showing 'Delta -- 2218860951' and an 'Add a Program' button. A checkbox is checked with the text 'Use my default credit card: Delta Amex'. At the very bottom, there is a 'Support Center' link and navigation buttons: 'Start Over', '<< Previous', 'Next >>', and 'Close'.

- Directly above the flights will be information regarding rules for the fare, and specifically where the fare comes from. This is where you can see whether this fare is from your Agency, or a direct purchase from the airline.
- Hold your cursor over an airport code to see the full name of the airport.
- Hold your cursor over an airline logo to see the full name for the airline.

When you find the fare and flight selections you want, you can click the **Seat Map** button to see seating information for the flight. 

- See [Seat Maps](#) for more information on selecting a seat.

If you choose a fare on an airline for which you have entered frequent flyer information, it will appear at the bottom of this page. You can click **Add a Program** to add an additional program, or choose an alternate frequent flier program for this flight.

If you set up a credit card as the default for air travel in your profile, there will be a checkbox for your credit card. Uncheck this box if you would like to choose a

different credit card. Companies that use a ghost card will display this information on the screen as well.

Click the **Print** link in the top right corner to print the fares, or to email selected fares.

Car Rental

When you select dates and times for your flight, you can also enter information for your car rental.

NOTE: If you are going to need your car for dates that are different from your airfare arrival and departure dates, or you need an off-airport car, you can skip this step entirely and add the car from your itinerary.


On the Flight tab, place a check next to **Pickup/Dropoff car at airport**.



You then may have the option to automatically reserve a car. Select the vendor and the preferred car class and Cliqbook will add the preferred car to your itinerary. You can view and change it from your itinerary if needed.

If you can't automatically reserve a car, then the car results will appear with each vendor on a different tab, immediately after you select your flight. Make sure to check your organization's travel policy regarding renting cars, as many users will only see preferred vendors on this screen.

If you need to add a car from your itinerary, you will see the **Rental Car Search Preferences** page.

- 5 Choose your pickup and drop-off locations. If you need to pick up the car from somewhere other than an airport, click the **Search** button next to the field. 

When you click Search, you will be able to enter search criteria for your rental car location. Choose to search near an airport, near an address, near a company location, or near a reference point or Zip code.

Cliqbook will show a list of car rental agencies within the specified radius you entered. Click **Choose this location** to select that vendor.

- 6 Enter dates and times for your car rental.
- 7 Choose a car type. Use the **Ctrl** key to select multiple car sizes.
- 8 Once you click **Next** you will see a list of cars.

If you only need a car, choose the **Car** tab when you start searching. Enter your dates and times, and then choose **Airport Terminal** or **Off-Airport** to select your location.

- If you choose Airport Terminal, type in the city or the Airport code.
- If you choose Off-Airport, click the **Search** link to search for the location.

If you want, you can return the car to another location, and choose that location


To see additional search preferences, click **More Search Options**. When you are finished, click the **Search** button.

Car Rental Results

When selecting cars, you will see the following options:

- Blue tab - currently selected car rental vendor
- Green tab - rental price within your company's policy
- Yellow tab - rental price outside of policy that will require additional information
- Red tab - rental price outside of policy that will require additional information and approval

NOTE: For more information on yellow and red tabs see [Company Policy](#).

-  Company preferred vendors

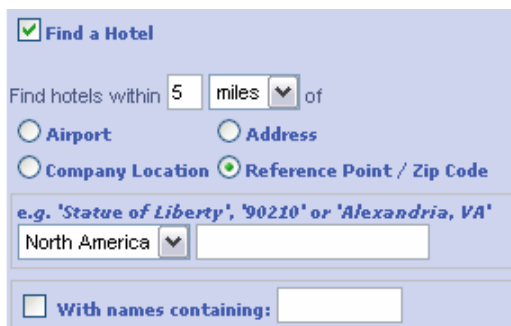
NOTE: Even if a car rental tab is within policy (green) make sure to pay attention to the policy for the individual car size you select for that vendor.

Hotel

When you select dates and times for your flight, you can also enter information for your hotel.

NOTE: If you are going to need a hotel for dates that are different from your airfare arrival and departure dates, or you need more than one hotel during this trip, you can either change the dates from your itinerary or skip this step entirely and add the hotel or hotels from your itinerary.

On the Flight tab, place a check next to **Find a Hotel**.



You will see search criteria for the hotel.

First, enter the search radius and choose either miles or kilometers. Cliqbook will always show **company preferred hotels** within a larger radius, usually 30 miles or kilometers.

Next, choose how you want to search:

- Airport – Type in the airport code or city name. Use the **Search** link to search for a nearby airport.
- Address – enter the address, including city, state, and postal code.
- Company Location – if your company has provided locations, choose one from the list. Your results will be near that location.
- Reference Point/Zip Code – enter a landmark, postal code, or city name and state.

You can also enter the hotel name, if you wish.

For more detail about how Cliqbook searches, see [How Cliqbook Finds Hotels](#).

If you add a hotel from your itinerary, you will see the **Find a Hotel** page. Use this option if you are not booking airfare, or you need multiple hotels for the same trip. The search criteria are the same.

If you are only booking a hotel, use the **Hotel** tab. On this tab, you can also enter your room type and your smoking preference.

How Cliqbook Finds Hotels

Cliqbook maintains a database of 60,000 geocoded (plotted with latitude and longitude) hotels.

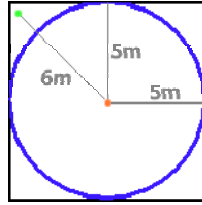
When you choose a reference point, Cliqbook geocodes it and creates a box/radius using the linear distance from the reference point and chosen mile/kilometer distance.

Cliqbook adds properties to your results display in the following order:

- 1 Find all company preferred hotels within **X** miles/kilometers. **X** is a distance determined by each individual company. Most companies choose 30 miles/kilometers, but some have a smaller or wider radius.
- 2 Find hotels in the search box that match your hotel name choice (if entered).
- 3 Fill up the rest of the hotels with the closest hotels to the geocoded reference point.

Some hotels will be outside of your search radius for the following reasons:

- Cliqbook displays all company preferred hotels within **X** miles of your reference point, no matter what you chose as your search distance. Keep in mind that your company or agency administrators determine this search radius, which is usually 30 miles.
- Cliqbook uses a box, rather than a circle for the search boundary. So if you choose a five mile radius search, Cliqbook builds a box that is 10 by 10, with the reference point in the center.





Notice that the corners of the square are more than 5 miles away from the center point. A hotel in this region (shown by the green dot) will show up in your search but may be slightly further away than you requested.

Hotel Results

When you see your hotel results, you will see the following options:

- Blue tab - currently selected hotel
- Green tab - at least one rate on the hotel tab is within policy
- Yellow tab - hotel rates are outside of policy, and will require additional information
- Red tab - hotel rates are outside of policy, and will require additional information and approval, OR hotel is sold out for the dates entered

NOTE: For more information on yellow and red tabs see [Company Policy](#).

-  Company preferred hotel property
-  Company preferred hotel chain, or your personal preferred chains

You may have the option to get more hotels. Each search automatically returns a certain number of hotels and shows if there are more available that are not shown. To see more, click **Get More Hotels** on the left side of the screen.

Click on a hotel tab to see all the available rates for the hotel. Each rate is also marked green, yellow or red to indicate whether the rate is within policy.

NOTE: Even if a hotel tab is within policy (green) make sure to pay attention to the policy for the individual rate you select for that hotel.

The **Info** button lets you see additional information for that hotel, including available amenities and cancellation policies.

Click the **View Map of Hotels** link to map the location you selected, and the location of the hotels

If you are having problems finding a hotel, please see [Hotel Search Tips](#).

Hotel Search Tips

To ensure that you find a specific hotel, make sure you choose the closest reference point to that hotel.

For instance, do not search for a hotel near Chicago O'Hare airport when the hotel you want is in downtown Chicago. A postal code search will work fine in a

small town, but it won't work well in a large city like New York. The best reference point in a large city will often be an address or a landmark search.

If you know part of name of the hotel, enter it in the **With names containing:** field.

If for some reason Cliqbook can not correctly geocode the location you enter, choose to search near the closest company location or airport, use a search radius of 99 miles or kilometers, and choose the hotel chain or part of the hotel name in the name search field.

If you still cannot find your hotel, then please send an email to hotelsearch@outtask.com

Limo or Car Service

Some organizations choose to give their travelers the option to book a car service or limo in Cliqbook. If you have this option, click the **Add Limo** link from your itinerary to add a limousine or car service to the trip. If you are only booking a Limo, you can choose the **Limo** tab when you begin your search.

- 1 Choose your vehicle type, either Sedan or Stretch Limousine.
- 2 If this is an existing trip, choose the City and Date for your Limo reservation.
- 3 Choose your pickup and drop off locations.
 - If your profile is correct, you will see your home address as one of your locations.
 - If you have already reserved a hotel, your hotel address will be one of your locations.
 - If you have already reserved air, your arrival or departure airport will be one of your locations.
 - If none of these locations are correct, choose **Other...** and type in the location.
- 4 Choose your dates and times and click **Next** to proceed.

If you choose the Limo tab, your search criteria are the same. When you are ready, click **Search**.

Limo Results

Once you click **Next**, you will see a list of results with the following options:

- Blue tab - currently selected vendor
- Green tab - at least one rate on the vendor tab is within policy
- Yellow tab - vendor rates are outside of policy, and will require additional information
- Red tab - vendor rates are outside of policy, and will require additional information and approval

NOTE: For more information on yellow and red tabs see [Company Policy](#).

Select the vendor and car you prefer and click **Confirm**.

Cliqbook will prompt you for some additional information, including number of passengers, form of payment, driver, and any special instructions.

Once you click **Book Limo**, the request is sent to Cliqbook's partner for Limo reservations, and the Limo is part of your itinerary.

NOTE: The confirmation code for your itinerary may not appear immediately. If you do not see a confirmation code, it should appear within 10-15 minutes. It will also be part of the final email that comes from your travel agency.

Company Policy

Some companies choose to have the travel policy reflected in Cliqbook air, car, or hotel results. This information will appear on the tabs in your results.

- A green tab indicates that the choice is within policy. No further action is required on your part.
- A yellow tab indicates that the choice is not within policy. When you select a travel option on a yellow tab, you will see the rule that was violated, and the action that Cliqbook will take. For yellow tabs, Cliqbook will either send an email to the approver, or save this information in a report for your company's travel department.
- A red tab indicates that the choice is not within policy, and that this entire trip will now require approval by the designated approving manager. When you select an option on a red tab, you will see the rule that was violated. Cliqbook will send an email to the approver, and once that person approves the trip, it will be sent to your agency for ticketing.

If you select a yellow or a red tab, when you click **Next** to continue through the wizard you are prompted to enter a reason why you violated company policy. Cliqbook shows a list of reasons, and also allows you to type in an explanation. This information is either saved for a report (certain yellow tabs) or forwarded to your approving manager (certain yellow tabs and all red tabs).

NOTE: If you select an option on a red tab, and the trip is rejected by your manager, you may be able to modify the trip by selecting **Change Trip**, and/or resubmit the trip to the approver. If you choose not to resubmit the trip, make sure that you cancel or withdraw the reservation. Reservations left uncanceled may result in no-show fees from hotels, car rental agencies, or limousine vendors. See [Upcoming Trips](#) for more information on canceling a trip.

See [Approve a Trip](#) for information on how to approve trips.

Itinerary

Once you have booked your reservation, you will see your itinerary.

The following options are available from the itinerary:

- Change Seat - click the **Change Seat** button beneath any leg of your travel to select a different seat. See [Seat Maps](#) for more information.

- Change Flight - some organizations will also allow you to change your flight from the itinerary page. Click this button and follow the prompts to change your outbound or return flight.

Travelers given the option to change a flight will be able to select a different date or time for the trip, but must stay on the same airline.

NOTE: Changing a flight can result in fare changes. If this option is available to you, please make sure to check with your travel agency on fare differences.

Click any one of the **Add** links to add an option at that destination city:

- Add Limo - add a Limo to the reservation (not used by every customer)
- Add Car Rental - add a rental car to the reservation
- Add Hotel - add a hotel to the reservation

Click the **Cancel** link beneath your car, hotel, or Limo reservation to cancel that segment.

Click the **Change Date** button beneath your car, hotel, or Limo reservation to change the dates for that segment.

Once your itinerary is ready, proceed to the next page.

Trip Booking Information

The Trip Booking Information screen lets you enter additional information about your trip.

- Enter or modify your trip name. This is how the trip will appear on your itinerary and in the automated email from Cliqbook.
- Enter a trip description. This field is optional.
- Enter any comments for the travel agent. Refer to your company policy for information regarding the use of the agent comments field.
- Choose if there is anyone else who should receive the initial confirmation email. If you book the trip, you will automatically receive the email. If you book as an arranger, you will receive the email as well.
- Choose your preferred email format, either plain text or HTML. Some companies do not offer travelers this option, and always send plain text email.
- Choose whether you would like to receive directions or maps to the hotel. This information will be part of the initial email from Cliqbook.
- Some companies also require billing information. Make sure to complete this information if required.

Some companies also offer the travelers the option to **Hold** a trip. Cliqbook will always display the length of time this trip can be held on this page. Pay close attention to the date and time displayed; if the trip is not submitted, approved, and ticketed by the date and time displayed, in most cases it will be automatically cancelled. See [Hold a Trip](#) for more information.

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- Click **Next**. Cliqbook will display your itinerary a final time. This itinerary will include any messages about ticketing policies.
 - Make sure to click the **Purchase Ticket** button to send your request to the travel agents. Click the **Cancel** button to cancel the trip and delete the record.

The last screen shows your confirmation number and information to contact the travel agent.

Click **Close** to return to the Travel Center.

Hold a Trip

If your company gives you the option to hold a trip, you can choose to hold it from the Trip Booking Information screen. If you choose to hold a trip, make sure to pay close attention to the last ticketing date and time. This information will appear:

- On the Trip Booking Information page when you hold the trip.
- On the confirmation page after you reserve the trip
- In the Travel Center, on the Upcoming Trips tab. Check the status column for the ticketing date and time.

You must choose to purchase the trip by this date and time, or the entire trip will be cancelled.

NOTE: If your company requires approval for this trip, it must be approved before the ticketing date and time. Make sure to leave yourself and your approver enough time to assure the trip is ticketed.

To purchase a trip that has been held:

- 1 Click the name of the trip in the Upcoming Trips list.
- 2 Choose **Finish/Complete Trip**.

Cliqbook will show details for the trip. Make any needed changes, then continue through the wizard to either purchase or cancel the trip.

- 3 You will receive another confirmation email from Cliqbook indicating the updated status of this trip. If the trip requires approval, your manager will now receive the approval email as well.

After Ticketing

Once you submit the information for your trip, the following events occur:

- The Travel Center will refresh, and when you click the Upcoming Trips tab you will see the trip you just booked in the list of trips.
- You will receive email from Cliqbook confirming your choices. For Microsoft Outlook users, double-click the attachment in the email to open an Outlook appointment, which you can then save to your Outlook calendar.

- If you chose an option on a **RED** tab, your trip will require approval. Your manager will receive email notification, and approval is required before your trip is ticketed.

Once a travel agent tickets your trip, you will receive a final confirmation email. This is your official itinerary, which you can use to check in at the airport.

Approve a Trip

If your company uses approvals, and you are an approving manager, you will receive an email shortly after the traveler submits the trip for ticketing.

To approve the trip:

- 1 Log in to Cliqbook.

The **Alerts** tab will show the trip(s) that need your approval.

- 2 To approve a request from an employee, click the trip name, and the request will open.

Requests have two tabs, **Request** and **Itinerary**. The Request tab will show if there were any policy violations in the request, and the Itinerary tab will show the complete travel itinerary.

- 3 Click the **Approve** or **Reject** button. You are prompted to add comments if you wish.
- 4 Once you approve the trip, it will be sent to the travel agency for ticketing. If you reject the trip, the traveler will be notified, and must cancel or resubmit the trip.

Cliqbook allows you to designate another user to approve trips for you while you are unavailable. See the **Travel Vacation Reassignment** feature in [Additional Profile Options](#) for more information.

Change Trip

Typical changes that can be made to a reservation in Cliqbook are:

- Add or modify a hotel reservation
- Add or modify a car rental reservation
- Add or modify a limousine or car service reservation, if available
- Modify a flight, if available

If you have reserved a trip and you wish to make a change, click the name of the trip on the Upcoming Trips tab and choose **Change Trip**.

The information displayed will be the same or similar to the information displayed on the Itinerary page in the wizard. Make any needed changes to the trip and continue through the wizard to process the changes. See [Itinerary](#) for more detailed information.

NOTE: Most companies require that you contact the travel agency to make changes to airfare after ticketing; however, many customers will be able to make

pre-ticketing changes from this page. If you see the **Change Flight** button, you will be able to change your airfare.

Templates

Templates allow travelers to request a similar trip on multiple occasions. To view templates, click the **Templates** link on the Travel Center page.

The Templates page shows any existing templates, and lets you create new templates.

- Personal Travel Templates are templates that you created, and you can edit or delete them.
- You may also see Company Travel Templates that travel administrators created and made available to travelers at your company. You cannot edit or delete these templates unless you are a travel administrator, but you can book a trip using these templates.

To book a trip using a personal or company template:

- From the Travel Templates page, click the **Book** link next to the template you wish to use.
- From the Run Template page, choose the dates for your travel. You can modify times, the number of days for your trip, or choose the particular segments to book. If there is a segment you do not want to book, remove the check from that segment.

Cliqbook will perform the search, showing results for all the travel segments you chose. Continue through to book your travel as usual.

Create a Template

There are two ways to create a new template:

- From a trip that appears on the Upcoming Trips tab.
- From the Templates page.

To create a template from an existing trip, simply click the trip and choose **Create Template**.

To create a template from the Templates page, follow these steps:

- 1 Click the **Add New Template** link on the right side of the page.
- 2 On the **New Travel Template** page, enter information about the template and click **Next**.
- 3 Enter a Template Name (required) and a Description, if needed.
- 4 If this template is new, choose **Start from an empty template**.
- 5 If the trip comes from a previous trip, choose **Record Locator** and enter the record locator number. This number should be included with the email or information you received from the agent when you booked the trip.

- 6 If the trip is based on an existing template, choose **Existing Trip Template**, and then choose the template from the list.

If you choose to create a template from an existing trip, you will see information from that trip on this page. If you chose to create a brand-new template, this page will be blank.

- 7 Click **Add Air**, **Add Car**, or **Add Hotel** to begin building your template.

You can always edit or delete an air, car, or hotel segment from the Edit Travel Template page by clicking the **edit** link next to the segment.

Add a Segment to a Template

Add Air

When you click **Add Air**, you can choose **General Search** and enter the cities and preferred times for your travel, or you can choose **Search for a specific flight**, and enter the carrier, flight number, and preferred fare class.

Make sure to add the outbound and the return, if this is a round-trip flight.

Check **This flight is a connection to a previous flight** if the current segment is a connection.

After you add each segment in the template, click **Save**.

Add Car

When you click **Add Car**, you can specify a vendor, an airport, the number of nights you need the vehicle, and the car type.

If you have already added your air, Cliqbook will estimate when you will need to pick up and drop off the car. Otherwise, you can enter the estimated times on this page.

Click **Save** to save the car information.

Add Hotel

When you click **Add Hotel**, enter the number of nights and the city. The city code will automatically populate based on the flight information you have already entered. You can search for hotels in alternate cities, if desired. Click the search button if you do not know the three-digit airport code.

When adding a hotel to a template, you can choose up to four hotels to search.

Enter the vendor and hotel name, if you know this information. If you want to search for a specific hotel, click the **Search for Hotel Property** link.

You can enter up to six different search parameters, including city, GDS ID (if known), phone number, or chain or property name.

Cliqbook automatically enters some initial parameters, based on the city you entered. Choose additional parameters and then choose how to search. You can choose to search properties that begin with, end with, or contain the information. Then, enter the search value.

For example, if you are searching for a hotel in Naperville, Illinois, you would change the city name from Chicago (populated based on the airport code) to

Naperville. If you are not sure of the spelling of a city, you can enter the first few letters and then choose **Begins with** instead of **Is exactly**. You can then add additional parameters, up to a total of six.

Use the parentheses to prioritize searching. For example, if you want to find a hotel that is in Chicago, and the property name contains either Marriott or Hilton, use the **and/or** fields and the parentheses to tell Cliqbook to search for the first parameter, then only one of the next two parameters.

Once you enter the criteria, click **Submit**. You will see the results on the page. Place a check next to the hotels you wish to add to this template, and click **Select Hotels**. If you choose a hotel for which your company has a discount, the discount code will appear on the Hotel Information page.

Once you have chosen between one and four hotels, click **Save** to return to the **Edit Travel Template** page. When you are finished building your template, click **Save**.

Edit a Template

If you choose to create a template from an existing trip, or edit an existing template, you will see information from that trip on this page.

To modify a template, click the **Edit** or **Remove** link next to the segment you wish to edit or delete.

You can also add additional segments by clicking the **Add Air**, **Add Car**, or **Add Hotel** links within the template.

Make sure to click **Save** whenever you modify a template.

Click **Delete Template** to remove it from the list. You can only delete templates that you create.

Click **View All Templates** to return to the Travel Templates page.

Additional Features

Travel Assistants or Arrangers

Assistants in Cliqbook have the ability to book trips for you, view trips already booked in the Upcoming Trips list, and modify your profile.

From the Profile page, click **Add an Assistant** to add an assistant or arranger to your profile. In the box that appears, you have the following options:

- Type in the search criteria. You can search by name, log-in ID, or email address.
- Click the arrow next to the **Search What** field to choose to search for an exact match of the email address, last name, or log-in ID.

Once you click **Search**, Cliqbook will return a list of results. If there are multiple matches, it will tell you how many results came back

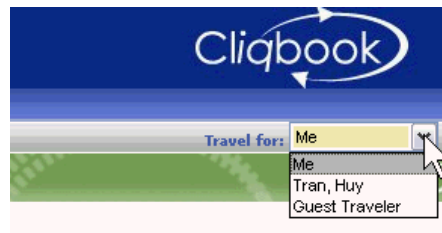
- Select a person, then place a check in the **Can book travel for me box**. If you are also a Vinnet user, you can designate the same person as an expense assistant.

Each traveler can have one primary assistant. The primary assistant's name and work phone number become part of the traveler's profile. Only users with a work telephone number in their profile can be selected as primary assistants.

- Save the arranger, and that person will now be able to select your name when he or she logs in to Cliqbook. You can update or edit the arranger at any time.

If you can't find the arranger's name, he or she may not have a Cliqbook account. Check with your travel manager to see who adds users into Cliqbook.

To book a trip as an assistant, select the traveler's name from the list before you launch the travel wizard.



Book Travel as an Assistant

To book a trip as an assistant, select the traveler's name from the list before you enter search criteria. You will see the traveler's name on the screen in the wizard, on the left side of the page.

When you book a trip for one of your travelers, you will automatically receive the confirmation email from Cliqbook that shows that the trip was reserved. If you wish to receive all email that comes from Cliqbook, make sure to place a check next to and add your email address in the **Email 2** or **Email 3** fields in the traveler's profile.

Some users will also have the ability to add themselves as assistants to any traveler. If you have this ability, you will see the **I'm Assisting...** link at the bottom of the left side of the profile page in Cliqbook.

Click the link to search for and select the traveler you should be assisting

Seat Maps

You can view a seat map in Cliqbook when you see your flight results, and you can also select a seat once your flight has been reserved.

To view a seat map from flight results:

- 1 Click the **view seat map** button next to the flight. 

A code for seats appears at the bottom of the page, showing which seats are available, which seats are occupied, and which seats are considered preferential. The bottom right corner will show the number of available seats by class of service for this flight.

- 2 If you are planning to choose this flight, you can select a seat at this point. You can select any green (unoccupied) seat. Hold your cursor over a seat to see the actual number for that seat.

To view a seat map from a reserved flight:

Click the **Change Seat** button from your itinerary.

A code for seats appears at the bottom of the page, showing which seats are available, which seats are occupied, and which seats are considered preferential.

To change your seat, click the seat you prefer. Hold your cursor over a seat to see the actual number for that seat.

Once you select your seat, you can either click **Change Seat**, or select the next flight in your reservation to change another seat. Cliqbook will prompt you to save your new seat selection.

Anytime you view the seat map or select seats, it is important to keep the following things in mind:

- Preferential seats (highlighted in yellow) should only be selected by travelers with preferred status on the selected airline. It is also necessary to have your frequent flyer number part of your Cliqbook profile. If you select a preferential seat and this information is not entered, your seat request may not be honored.
- Some seats are marked handicapped, and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.

Voice

If your company is using Voice, you will see your setup information in your profile, including the telephone number to call and your log in information. Access Voice from any phone if you need to get information about or make changes to a trip that you have already booked.

Once you have called Voice several times from the same phone, Voice will ask you if you want it to recognize this number. You must be the only user who uses that phone number.

As soon as you dial in you will hear a listing of any trips you have already booked. Voice currently works with existing reservations. If you need to book airfare, use Cliqbook or contact your travel agents.

You can say the following words or phrases to access different options in Voice:

- **Help** - get help using Voice.
- **Main travel menu** - return to the main menu.
- **Travel agent** - connect to be connected to the travel agent.

- **Itinerary** - hear your itinerary, including any car or hotel details.
- **Repeat** - repeat an itinerary if you need to hear it again.
- **Hotel** - hear hotel details, or reserve a hotel.
- **Car** - hear car rental details, or reserve a rental car.
- **Email** - have your itinerary sent to you via email.

Tips for using Voice:

- The Cliqbook voice will stress words that you can say to go to that option.
- It is not necessary to wait for Voice to finish asking a question. If you know the answer, you can say it at any time.