

Creating a Template



Online Help Desk: 800-221-4730 or
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CREATING A TEMPLATE (Method #1)

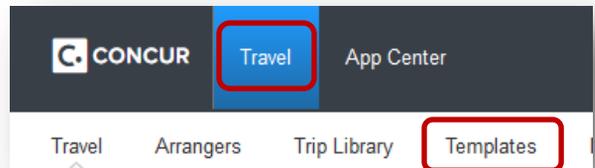
Creating a Template allows you to save a trip from an existing or previous reservation and reuse it. A Template is ideal if you take the same trip consistently to a designated location.

****NOTE**** The template DOES NOT automatically make a reservation for you. The Template saves you the time of entering all of the information in your initial search

There are two methods of creating a Template

Method #1: Create a Template from an existing Record Locator.

- Under "Travel", Choose "Templates"



- On the next page, on the right hand side, click **[+] Add New Template**

[+] Add New Template

- Choose a Template Name that will make it easy for you to identify it

New Travel Template

Template Name: *(Please use a unique name)*
Monthly Chicago Sales Meeting

- Free form information about the trip

Description:
AA flight from Philadelphia to Chicago, National Compact Car, Extended Stay

- This is the Record Locator that I had from a previous PHL-ORD reservation

Start this trip template from:
 Start from an empty template
 Record Locator: XDPRN4
 Existing Trip Template: Choose a template

- Click "Next"

Next

Method #2: Create a Template from an existing (live) Reservation

- Under “**Upcoming Trips**”, choose the trip you want to copy

Company Notes		Upcoming Trips	Trips Awaiting Approval
Trip Name/Description			Status
Trip from Philadelphia to Chicago (XDPRN4) June 2017 - Monthly visit to Chicago Office			Confirmed

- On the next screen, under “**I want to...**”, choose “**Create a Template**”

I want to...

- [Print Itinerary](#)
- [E-mail Itinerary](#)
- [Open in Outlook](#)
- [View Trip History](#)
- [Create Template](#)
- [Clone Trip](#)
- [Share Trip](#)
- [Cancel Entire Trip](#)

- Choose a Template Name that will make it easy for you to identify it

- Free form information about the trip

- This is the Record Locator that I had from a previous PHL-ORD reservation

- Click “**Next**”

New Travel Template

Template Name: *(Please use a unique name)*

Description:

Start this trip template from:

Start from an empty template

Record Locator:

Existing Trip Template:

Next

- Using either Method #1 or Method #2, Click **Save**

Edit Travel Template

Owner:

Template Name (Please use a unique name)

Description:

Philadelphia Intl Arpt (PHL) to O'Hare Intl Arpt (ORD) Edit Air | Remove Air
 American Airlines (AA) Flight Number 647 Depart After 9:36 AM (Economy)

Car Rental at Chicago, IL, United States of America (ORD) 4 nights Edit Car | Remove Car
 Renting from: National
 Pick Up: 10:38 AM
 Pick-up at: O'Hare Intl Arpt (ORD)
 Return: 7:03 AM
 Returning to: O'Hare Intl Arpt (ORD)
 Car Type: Compact Car, Automatic transmission Air conditioning

Hotel at Chicago, IL, United States of America (CHI) 4 nights Edit Hotel | Remove Hotel

 Extended Stay
 Extended Stay America-O'Hare South

Property Code	Rate Code	Rate Amount
97870	A07AXC	104.99

O'Hare Intl Arpt (ORD) to Philadelphia Intl Arpt (PHL) Edit Air | Remove Air
 American Airlines (AA) Flight Number 605 Depart After 7:03 AM (Economy)

- Here is the Template you just created

PERSONAL TRAVEL TEMPLATES -- WILLIAM TRAINER NEVER

	Template Name	Created by	Description
	Monthly Chicago Sales Meeting	Never, William	AA flights from Philadelphia to Chicago, National Compact Car, Extended Stay
	Trip from Washington to Los Angeles	Never, William	Monthly 2017 LAX OFFICE VISIT

Let's use the newly created Template!

USING THE TEMPLATE

- Choose the Template you want to use/book

PERSONAL TRAVEL TEMPLATES -- WILLIAM TRAINER NEVER

	Template Name ▲	Created by	Description
Edit Book	Monthly Chicago Sales Meeting	Never, William	AA flights from Philadelphia to Chicago, National Compact Car, Extended Stay
Edit Book	Trip from Washington to Los Angeles	Never, William	Monthly 2017 LAX OFFICE VISIT

- You will have the option of choosing the same flights you took previously or the system can conduct a general search for you.

Change your dates to the new dates. Make sure your return date is correct

Click "Next"

Search for these specific flights I would like to do a general search

Depart Date:

Search for this car

Pick Up: Return:

Search for this hotel

Checking In: Checking Out:

Depart Date:

Ronald Reagan National Arpt (DCA) to Los Angeles Intl (LAX)
Alaska Airlines (AS) Flight Number 5 Depart After 9:15 AM (Economy)

Car Rental at Los Angeles, CA, United States of America (LAX)
Renting from: Budget
Pick Up: 12:30 PM
Pick-up at: Los Angeles Intl (LAX)
Return: 1:00 PM
Returning to: Los Angeles Intl (LAX)
Car Type: Economy Car, Automatic transmission Air conditioning

Hotel at Los Angeles, CA, United States of America (LAX)
6225 West Century Boulevard, Los Angeles, California, US,
Hyatt
Hyatt Regency Lax
Property Code 36324 Rate Code KNGCTP5 Rate Amount 217.55

Los Angeles Intl (LAX) to Ronald Reagan National Arpt (DCA)
Alaska Airlines (AS) Flight Number 6 Depart After 1:00 PM (Economy)

[Cancel](#) [Next](#)

Concur will now walk you through the reservation process.

Remember:

- Templates are ideal if you take the same trip to a designated location consistently
- A Template does not automatically make a reservation for you
- The Template saves you the time of entering all of the information on the initial search page
- Make sure your new dates in the Template are correct (departure and return date)
- Questions or Comments, call our Online Help Desk at 800-221-4730 or onlinehelp@worldtravelinc.com