



Your Profile

Your Profile contains a wealth of information unique to you and your role in the organization, including:

- delegate controls (i.e. who can book services for you and on whose behalf you can book services)
- personal service preferences, such as rental car size, home airport, hotel amenities, airline seat, package shipping provider, and much more
- personal information, such as home and work address, credit card information, passport information, and much more
- how you receive a confirmation each time you book a service (e.g. email, text message, etc.)

Note You will always receive an email confirmation for every service you purchase.

Some of this information may be entered and updated for you by your organization's HR department. This includes phone numbers, cost center, division, corporate credit cards, etc. However, you'll need to enter yourself much of this information yourself.

While it's not required that you fill out your Profile, you'll find that having a complete Profile saves considerable time.

Profiles Overview

Why is my Profile information important?

The system automatically fills in many fields when you're booking a service, from address information to credit card and passport information to preferred airplane seating and rental car size. This significantly reduces the time it can take you to arrange for these services, because you don't have to enter them each time you order a service.

For instance, each time you book an airplane flight or a hotel room, or arrange to ship a package, the billing information that appears in your Profile will automatically populate the relevant fields when you order that service.

What type of information goes into my Profile?

The information captured in your Profile is grouped into the following categories:

- Personal and employee information (name, date of birth, job title, department, etc.)
- Addresses and phone numbers (business and home)
- Emergency contact information
- Credit card information
- Password information (including the option to change your password)

- Address book entries (including the ability to modify and import and export entries)
- Travel preferences (including airport, airline, hotel, and rental car preferences)
- Shipping preferences (including addresses and shipping providers and methods)
- Confirmations and Notifications
- Delegates (who can book a service on your behalf, and people on whose behalf you can book a service)
- Display settings (including date and clock formats, units of measure, and currency)

Do I have to fill out my entire Profile?

Beyond any required fields, which will be clearly labeled, you can fill out as much of your Profile as you wish. However, as indicated previously, the more information you do provide, the faster and easier it will be for you to book services.

Setting / Changing your Profile and Display Setting

How do I access my Profile?

You can access your Profile in either of two ways:

From the home page, click **Profile** to expand the **Profile** box.

- Click **Go to your Profile**.
- OR --
- From anywhere in the application, click the **Profile** link at the top of the screen (the link will appear with your name in it).

Note Once you're in your **Profile** section and are entering information, there'll be a **Profile** navigation box on the left side of the screen. You can use the links in this box also to access any portion of your Profile.

Service Preferences

What are Service Preferences?

Service preferences refer to any of a number of choices for the travel and shipping services. Examples of service preferences include airline meal preference (travel) or

sender address (shipping). Creating these preferences in advance can save you valuable time when you're actually booking the service.

How do I set up or modify my travel preferences?

1. From the **Profile** page, in the **Preferences** section, click **Travel** preferences.

The **Travel Preferences** page displays.

2. There are six sections to complete; completing them is self-explanatory:

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- a. Flight
- b. Hotel
- c. Rental Car
- d. Airport Parking
- e. Car Service
- f. Travel Documents (includes passport, visa, and national ID card information)

3. When you're finished entering your information, click **Save** to return to the main **Profiles** page.

Note You can partially fill out your travel preferences, then save them and return to this page later to complete the rest of the information.

How do I set up or modify my shipping preferences?

1. From the **Profile** page, in the **Preferences** section, click **Shipping** preferences.

The **Shipping Preferences** page displays.

2. Enter the desired information in the **Packaging and Sender Address** sections. These will be the default values the system uses each time you ship a package.
3. In the **Shipping Accounts** section, click **Add account** to add a shipping account, and select a shipping carrier from the drop-down menu box.

The **Add Individual Carrier Account** page displays.

4. Enter the desired information, and click **Save** to return to the shipping preferences page.
5. Click **Save** to return to the main **Profile** page.

Confirmations

What are Confirmations?

You will receive an email Confirmation each time you book a service or one is booked on your behalf. The email will be sent to the address stored in your Profile on the **Addresses and Phone Numbers** page (see the **Confirmation Emails** section).

Can I send my Confirmation emails to a different email address?

Yes. Go to the **Confirmation Emails** section on the **Addresses and Phone Numbers** page. Under "Send to" select "A different address:" and input the address you want your Confirmation emails sent to.

Note: You will no longer receive Confirmation emails at the address stored in your Profile.

Notifications

What are Notifications?

Notifications contain information and updates about your services. You can have them sent to you by email, voice message, and mobile text. You can also have them sent to friends, family, and colleagues.

Note: Trip itinerary, Airport Parking, and Dining details Notifications can currently be sent only by email. The Shipment pick-up and delivery alert Notification cannot be sent by voice message.

How do I modify or add a Notification?

Modifying your Notifications:

1. From your Profile page, under the Notifications heading, click "Manage Notifications." The Notifications page displays.
2. If Notifications are set up for any of your services, click "Edit" to modify them, or "Delete" to delete them.

Important: You won't be prompted to click "Delete" a second time. When you click the "Delete" link, the Notification will be deleted immediately.

3. When you click Edit, a dialog box displays. Modify the information in the dialog box and click "Save."

Adding Notifications

1. To add a Notification, click the Notification you wish to receive. This displays a dialog box.
2. Enter your desired information and click "Save."

You can also set "quiet times" during which you will not be notified by voice or text message.

Delegates

What is a delegate?

A delegate is an individual who is authorized to book services on behalf of someone else. You can have your own delegates (that is, one or more individuals who can book services for you), and you can act as a delegate for more than one person (that is, you can book services for them).

Who assigns my delegate?

You can assign your delegates at any time. You may or may not be able to assign yourself as someone else's delegate, depending on your company's configuration.

You can assign your delegates (or assign yourself as a delegate, if this capability is available) via the Delegates section of your Profile. Confirmations that a service or event has been booked will be sent to the service consumer, as well as the person who booked the service.

No one can assign a delegate to a third party. Only you can choose your delegates or, if available, assign yourself as someone else's delegate. Also, for security purposes, you will receive an email Notification whenever someone assigns themselves as your delegate.

Can I become a delegate for someone else?

Yes, if the option is available. You can assign yourself as someone else's delegate via the Delegates section of your Profile.

How do I assign or become a delegate?

1. From your **Profile** page, in the **Personal Information** section, click the **Add** button next to the **Delegates** section.
2. Click **Become a Delegate** (to book services for someone else) or **Add a Delegate** (to assign someone else to book services for you).
3. Enter the name of your desired delegate in the search box, and click **Search**.
4. Select the person(s) you want to become a delegate for, or assign as your delegate.

How do I know who my delegates are, or for whom I am a delegate?

This information is displayed in the **Personal Information** section of the main **Profile** page, under the **Delegates** heading.

Can my delegate see all my personal information?

Credit card information is masked; your delegate will only be able to see enough data to be able to book services (i.e. the last four digits of your credit cards to be certain he or she is using the correct card). Nothing else is masked; delegates have full access to the Profile, so they can add in missing information that may be required to complete a booking as well as maintain this information on your behalf.

How do I know when my delegate has booked a service for me?

The system will automatically notify you according to the preferences you've set up in your Profile (i.e. by email, phone, or text message) each time a delegate has booked a service on your behalf.

Display Settings

What are display settings?

Display settings control how some aspects of your system will present some of your choices. They also enable you to set default values for your time zone (important for book time-sensitive services), units of measure (metric vs. U.S./Imperial – important for package shipping) and currency (important for purchases).

Why are display settings important?

Many of your service bookings are time sensitive. For instance, if you schedule a conference for 2:00 pm, the system needs to know in what time zone. Also, some reservations expire if not confirmed by a certain time, in which case any misalignment of hour settings is critical. There are similar issues with currency. So it's important you complete the Display Settings portion of your Profile.

How do I set up or modify these settings?

1. From the **Profile** page, look for the **Display Settings** box, on the lower-right side of the screen, and click **Edit**.

The **Display Settings** page displays.

2. Enter your information, and click **Save**.