

## Travel Manager Quick Guide: Making Travel Reservations

### 1) Before Making Reservations

#### ❖ Concur

- Contact your department Travel Administrator for enrollment and registration information.
- Log in with your user name and password and proceed to complete your **Profile**
- Confirm the Traveler's **Profile** is set up.
- Obtain traveler credit card information, i.e., number, name on the card, expiration date, for hotel reservation, if applicable.
- Be assigned as the Travel Arranger by the Traveler.

#### ❖ Southwest Airlines: SWABIZ

- Be assigned as the Traveler Manager by the Travel Administrator.
- Make certain the Traveler has an existing Rapid Rewards Account.
- Have your **Company I.D.** for log in.

### 2) How to Book a Reservation as a Travel Manager

#### ❖ Concur

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **Concur login**.
- Log in with your email address and password.
- **To Book Flight, Car and/or Hotel Reservations**
- On the **Concur Travel Center** page, under the **Flight** tab, enter travel search criteria and select the applicable boxes: **Pick-up/Drop-off at airport** and/or **Find a Hotel**.
- Verify **Refundable only air fares** box is checked.
- Click **Search**.
- Proceed to shop, select and **Reserve** for suitable flight, car rental, and/or hotel based on cost and Traveler's needs.
- Review the details of the reservation. Click **Next**.
- Enter the details in the **Trip Name** (required) and **Trip Description** (optional) fields. Click **Next**. (Note: If needed, a confirmation copy can be shared.)
- Review accuracy of itinerary.
- Click **Purchase Ticket/Confirm Booking**.
- Click **Print Itinerary** as necessary.

- **To Book Flight, Car or Hotel Reservations Separately**
- On the **Concur Travel Center** page:
  - For Flight: Click on **Flight** tab, or
  - For Car: Click on **Car** tab, or
  - For Hotel: Click on **Hotel** tab.
- Enter respective travel search criteria. Continue with steps previously outlined in the section: **To Book Flight, Car and/or Hotel Reservations**.

#### ❖ Southwest Airlines: SWABIZ

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **SWABIZ login**.
- Go to **Travel Manager** link.
- Log in with your company identification number (CID), name, and Travel Manager password.
- Click **Traveler Account Management** which opens the search for the Traveler Account listing.
- Enter Traveler's last name and first name; and card name from drop-down menu. (To obtain a full list of travelers, go directly to **Generate Report**.)
- Click **Generate Report**. This opens to page with Traveler's name.
- Click **Book** which is located on the far right of the screen.
- Enter travel search criteria and select suitable flight ("Anytime" or "Wanna Get Away" fares).
- Print confirmation.

### 3) Information Provided to the Traveler

- Itinerary.
- Boarding Pass Information.
- Travel Arranger Contact Information.
- For SWABIZ: CID number and/or telephone number.
- For NonSWABIZ: CALtravelstore website ([www.caltravelstore.com](http://www.caltravelstore.com)) and/or telephone number: 916.376.3989 or toll free 877.454.8785.
- **After Trip:** Required Documents for Travel Reimbursement.
  - Air itinerary showing airline and dates of travel.
  - If applicable, receipts for hotel, rental car, parking, meals, business expenses, i.e., baggage fees.

Also refer to the "Concur Travel How To Guide" (PDF) at [www.caltravelstore.com](http://www.caltravelstore.com)  
 For travel arrangement questions, contact Lori Wasson: (916) 376-3992; [lori.wasson@dgs.ca.gov](mailto:lori.wasson@dgs.ca.gov) or  
 Andrew Duarte: (916) 376-3988; [andrew.duarte@dgs.ca.gov](mailto:andrew.duarte@dgs.ca.gov)

## Travel Manager Quick Guide: Making Travel Reservations *Continued*

### 4) How to Change a Reservation as a Travel Manager

#### ❖ NonSouthwest Airlines

- If ticket is purchased via Cliqbook and you want to change the flight, you must call the CALtravelstore Travel Consultant at 916.376.3989 or toll free at 877.454.8785.

#### ❖ Car Rental and/or Hotel Changes via Cliqbook

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **Cliqbook login**.
- Log in with your email address and password.
- On the **Concur Travel Center** page, click on the **Upcoming Trips** tab.
- Click on the name of the trip you want to change.
- From the **Trip Actions** menu, click **Change Trip**.
- Select the portion of the trip you want to change/add, i.e., car rental, hotel, flight seat.

#### ❖ Southwest Airlines: SWABIZ

The Traveler or Travel Manager can make a change, as follows:

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **SWABIZ login**.
- Click on the **Travel Tools** tab.
- Under the **Manage Air** column on right-hand side, select **Change Reservation**.
- Enter existing confirmation number and Traveler's name.
- Click **Continue** and print new itinerary.

The Travel Manager can also make a change via the Traveler Account webpage, as follows:

- Open **SWABIZ login**.
- Click **Traveler Account** which opens the search for the Traveler Account listing.
- Enter Traveler's last name and first name; and card name from drop-down menu.
- Click **Generate Report**. This opens to page with Traveler's name.
- Click **Change** which is located to the right of the Traveler's name.
- Enter confirmation number, Traveler name and click **Continue**.
- Print confirmation.

### 5) How to Cancel a Reservation as a Travel Manager

#### ❖ NonSouthwest Airlines To Cancel Portion of Trip

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **Cliqbook login**.
- Log in with your email address and password.
- On the **Concur Travel Center** page, click on the **Upcoming Trips** tab.
- Click on the name of the trip you want to change.
- From the **Trip Actions** menu, click **Change Trip**.
- Select the portion of the trip you want to cancel, i.e., flight, car rental, hotel.

#### ❖ NonSouthwest Airlines To Cancel Entire Trip

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **Cliqbook login**.
- Log in with your email address and password.
- On the **Concur Travel Center** page, click on the **Upcoming Trips** tab.
- Click on the name of the trip you want to cancel.
- From the **Trip Actions** menu, click **Cancel Trip**.
- Click **OK**.

#### ❖ Southwest Airlines: SWABIZ

The Traveler or Travel Manager can make a cancellation, as follows:

- Go to the [www.caltravelstore.com](http://www.caltravelstore.com) website.
- Open **SWABIZ login**.
- Click on the **Travel Tools** tab.
- Under the **Manage Air** column on right-hand side, select **Cancel Reservation**.
- Enter existing confirmation number and Traveler's name.
- Submit and print cancellation.
- Click **Continue**.

The Travel Manager can also make a cancellation via the **Traveler Manager** webpage, as follows:

- Open SWABIZ using the Travel Manager log in.
- Click **Travel Account Management**.
- Click on the **Travel Tools** tab.
- Under **Manage Air** column, select **Cancel Reservation**.
- Enter existing confirmation number, Traveler's name and click **Continue**.
- Print cancellation.