



atriis

MANAGING TRAVELLER PROFILES

A step-by-step guide for travel bookers using Atriis



Before you begin

As a travel Booker you arrange trips on behalf of your colleagues. Before your first booking, set up your own profile and check the profiles of the travellers you look after. Complete profiles mean faster bookings, fewer errors, and the right details reaching airlines and hotels.

HAVE THESE TO HAND

- Your mobile number
- Your travellers' passport details
- Their frequent flyer or loyalty numbers

WHAT WE WILL COVER

- Set up your own account
- Complete your own profile
- Find a traveller in Atriis
- Open their profile
- Complete each section of their profile

You do not need to enter any card details. Please leave the Form of Payment tab blank — your company account is already set up with us.

1 Your welcome email

You will receive an email from Atriis titled "Welcome to Uniglobe Travel Booking Portal". It confirms the username we have set up for you.

Click "Click here to get started" to begin.

Not arrived? Check your spam or junk folder before contacting us.

Welcome to Uniglobe Travel Booking Portal

 notification@atriis.com
To Sam Booker

 If there are problems with how this message is displayed, click here to view it in a web browser.

UniglobeTravel

Welcome to Uniglobe Travel Booking Portal

Dear Sam Booker,

Hello and welcome to Uniglobe Travel Booking Portal! We are happy you have joined

Your user name is : [firstname.lastname@company.com](#)

[Click here to get started](#)

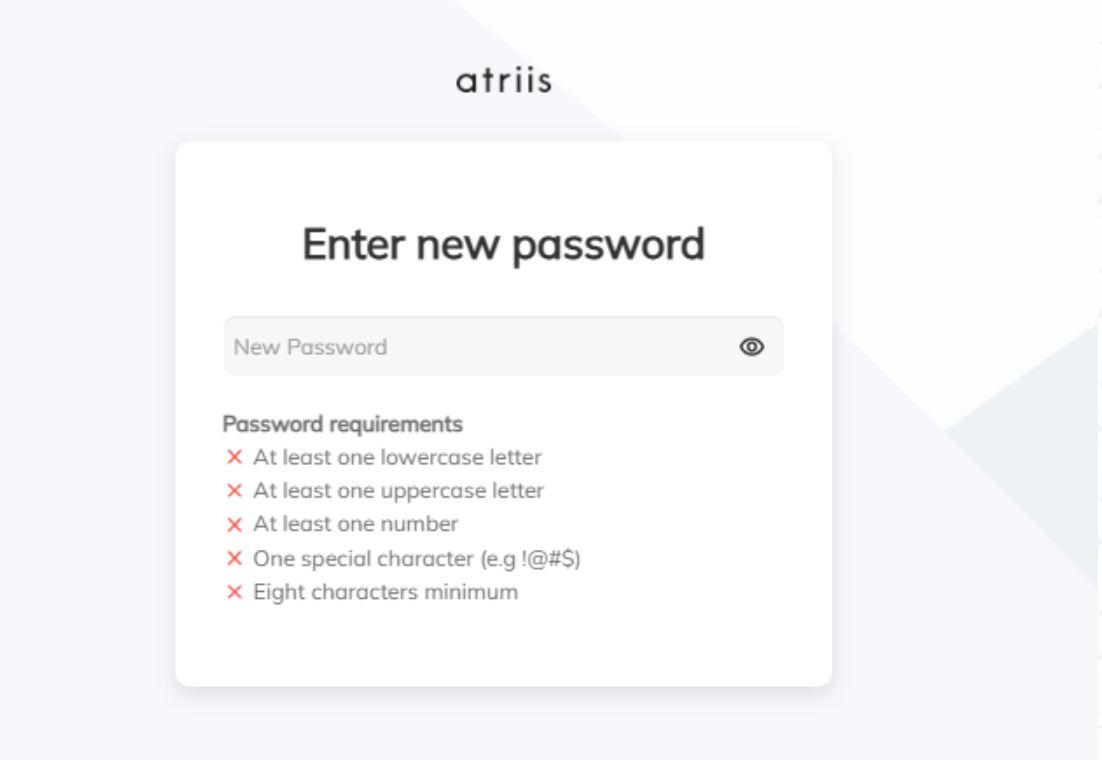
2

Set your password

Create a password for your account. It must include at least one lowercase letter, one uppercase letter, one number and one special character, and be at least eight characters long.

Every requirement must be met before you can continue.

Your password is personal to you. Please do not share it with colleagues.



The screenshot shows a web interface for setting a password. At the top, the word "atriis" is visible. Below it, the heading "Enter new password" is centered. There is a text input field labeled "New Password" with a toggle icon on the right. Below the input field, the section "Password requirements" lists five criteria, each preceded by a red "X" icon, indicating they are not yet met:

- At least one lowercase letter
- At least one uppercase letter
- At least one number
- One special character (e.g. !@#)\$)
- Eight characters minimum

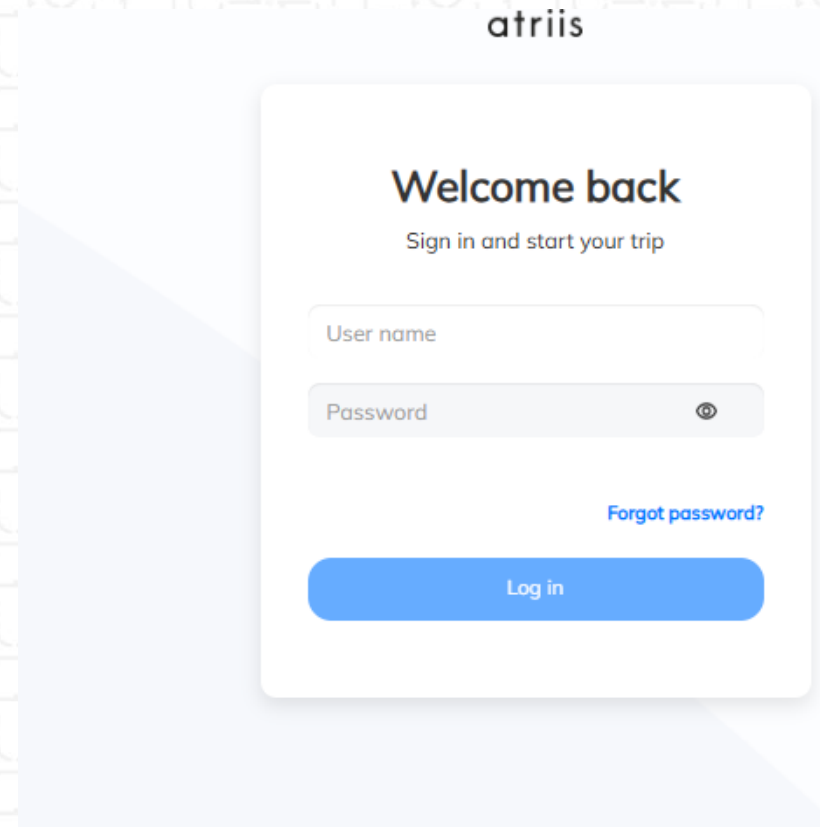
3

Log in to Atriis

Sign in using your email address as your username, together with the password you have just created.

Atriis is used for all of your bookings, so please bookmark this page for easy access.

If your company uses single sign-on, you will not have set a password — sign in with your usual company login instead.

The screenshot shows the Atriis login interface. At the top, the 'atriis' logo is displayed. Below it, the heading 'Welcome back' is followed by the subtext 'Sign in and start your trip'. There are two input fields: 'User name' and 'Password'. The 'Password' field includes a toggle icon for visibility. A link for 'Forgot password?' is located below the password field. At the bottom, there is a prominent blue 'Log in' button.

atriis

Welcome back

Sign in and start your trip

User name

Password

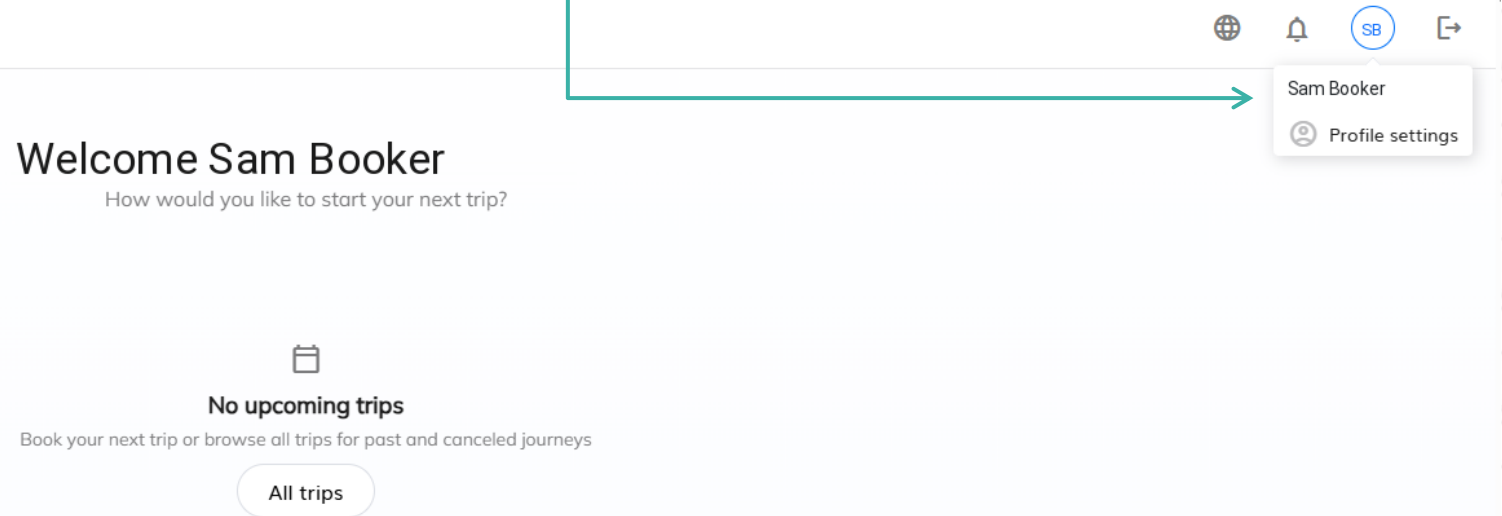
[Forgot password?](#)

Log in

4

Complete your own profile

Click your initials in the top right-hand corner and choose "Profile settings". Add your mobile number — this is the only detail we need from you to make bookings for others



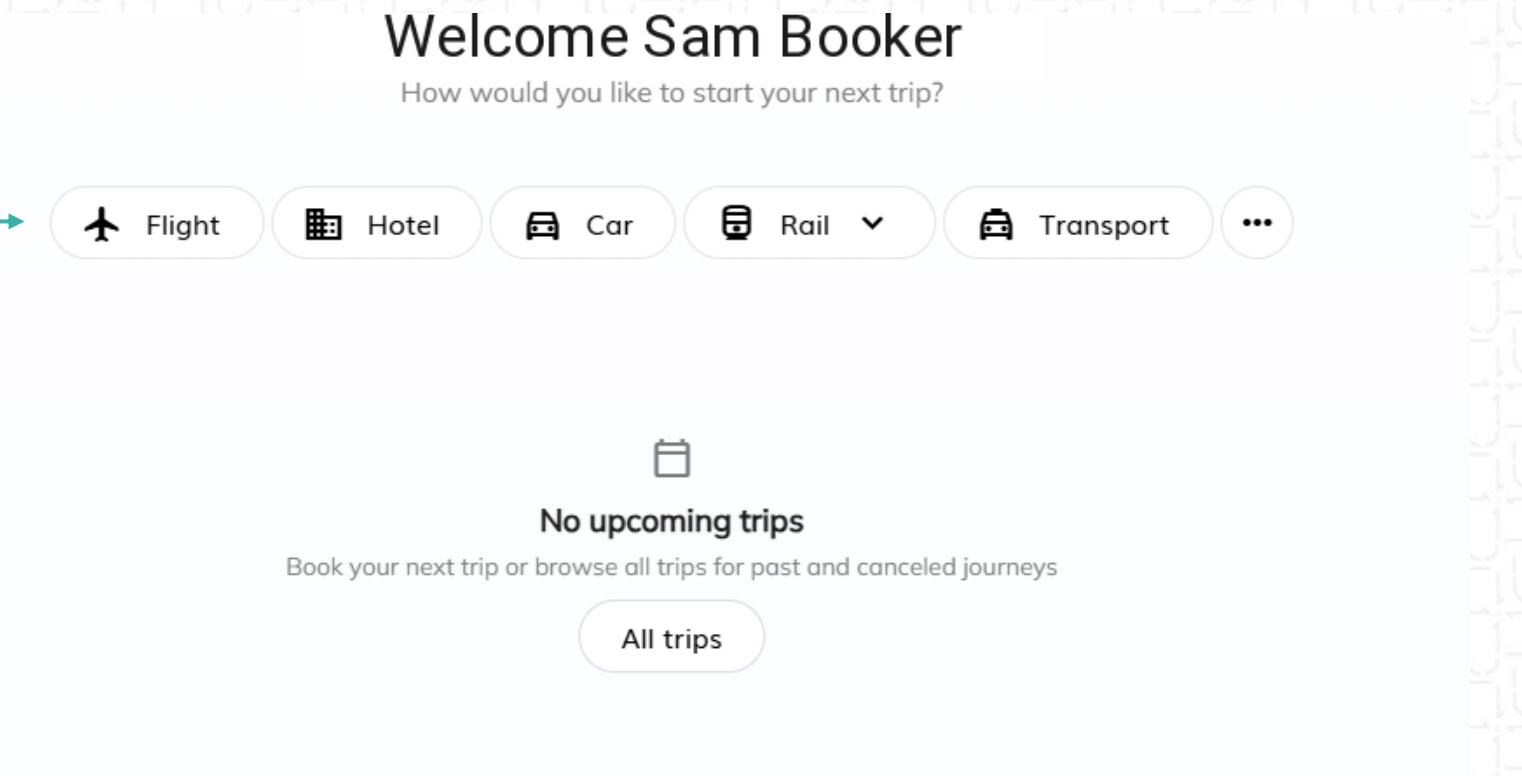
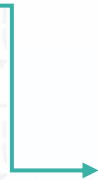
There is no need to enter a credit card. Please leave the Form of Payment tab blank.

5

Start a booking

Traveller profiles are reached through the booking screen, so begin by choosing a product — Flight, for example.

You do not have to complete a booking.
You only need the search screen in order to reach a profile.



6

Click Add traveller

On the search screen, click "Add traveller"
at the bottom left.

Welcome back Sam

Plan your next trip

The screenshot shows the Uniglobe travel search interface. At the top, there's a navigation bar with icons for Flight, Hotel, Car, Rail, Transport, and Parking. Below this, the main heading is "Find flights for your trip". There are tabs for "Round trip", "One way", and "Multi city", with "Round trip" selected. To the right, there's a link for "Complete trip By schedule". The search form includes fields for "From... Departure" and "To... Destination". Below these are fields for "Depart Date" and "Return Date". There's a dropdown for "Economy" and a dropdown for "1 Traveller". An "Advanced search" link is visible. At the bottom, there are checkboxes for "Add Hotel to this trip" and "Add Car to this trip". The "Add traveller" button is highlighted with a teal arrow from the text on the left. Other buttons at the bottom include "Add me", "Travel request", and a blue "Search" button.

✈ Flight Hotel Car Rail Transport Parking

Find flights for your trip

Round trip One way Multi city Complete trip By schedule

✈ From... Departure ✈ To... Destination

📅 Depart Date — Return Date 📅 Economy 1 Traveller

Advanced search ☐ Allow nearby airports

☐ Add Hotel to this trip ☐ Add Car to this trip

+ Add traveller Add me Travel request Search

7 Search for your traveller

The Add traveller box opens. Leave "Use as primary traveller" ticked so the correct policy and approval rules are applied.

Click into the search box to begin.

"Add guest traveller" is for visitors and contractors who do not have an Atriis profile.

The screenshot displays the 'Welcome back Sam' interface for planning a trip. A modal box titled 'Add traveller' is open, featuring a checkbox for 'Use as primary traveller (for policy and approval flow)' which is checked. Below this is a search bar labeled 'Search specific traveller' with the placeholder text 'Search by name, user group, username or email'. An 'Add guest traveller' button is also present in the modal. The background interface includes tabs for Flight, Hotel, Car, Rail, Transport, and Parking. The 'Find flights for your trip' section shows options for Round trip, One way, and Multi city. At the bottom, there are buttons for 'Add traveller', 'Add me', 'Travel request', and a 'Search' button.

8

Select them from the list

Type the traveller's name and matching traveller's will appear beneath the box.

Click the correct person to add them to the booking.

Only travellers allocated to you will appear in this list.

The screenshot displays the Uniglobe travel booking interface. At the top, it says "Welcome back Sam" and "Plan your next trip". Below this is a navigation bar with options: Flight (selected), Hotel, Car, Rail, Transport, and Parking. The main section is titled "Find flights for your trip" and includes options for "Round trip", "One way", and "Multi city". There are input fields for "From... Departure" and "Depart Date". A "Complete trip" section is on the right with "By schedule" and "Allow nearby airports" options. A modal window titled "Add traveller" is open in the center. It has a checkbox "Use as primary traveller (for policy and approval flow)" which is checked. Below this is a search bar with the text "sam". A list of results is shown: "Sam Peters" (Company Group, sam.peters@company.com) and "Sample Traveller" (Standard, firstname.lastname@company.com). At the bottom of the modal are buttons for "Add traveller" and "Add me". The background interface also shows a "Travel request" button and a "Search" button.

9

Open their profile

The traveller now appears at the bottom of the search screen. Double-click their name to open their profile.

Welcome back Sam

Plan your next trip

The screenshot shows the Uniglobe flight search interface. At the top, there are tabs for Flight, Hotel, Car, Rail, Transport, and Parking. Below the tabs, the text 'Find flights for your trip' is displayed. The interface includes fields for 'From... Departure', 'To... Destination', 'Depart Date', 'Return Date', 'Economy' (with a dropdown arrow), and '1 Traveller' (with a dropdown arrow). There are also links for 'Round trip', 'One way', 'Multi city', 'Complete trip', and 'By schedule'. An 'Advanced search' link with a dropdown arrow is present. Below the search fields, there are checkboxes for 'Add Hotel to this trip', 'Add Car to this trip', and 'Allow nearby airports'. At the bottom, there are buttons for 'Add traveller', 'Add me', and a profile card for 'ST ★ Sample Traveller' with a close button. To the right of the profile card are buttons for 'Travel request' and 'Search'. A teal box highlights the 'Sample Traveller' profile, and a teal arrow points to it from the left.

10

Personal details

Check that their first and last names are spelt exactly as they appear on their passport, and add their date of birth.

Their username is set by us and cannot be changed. Click "Save Personal Details".

If they use an approval process, you can nominate a backup approver here for when they are away.

Sample Traveller

Your profile settings

Personal Details	Contact Information	Passports and Visas	Frequent Programs	Travel Preferences	Form of Payment
ST Change image Recommended size 80x80 px					
Title Mr. ▾	* First Name Sample	Middle Name Middle Name	* Last Name Traveller		
Gender Male ▾	Birth Date DD MMM YYYY	Traveller type Adult (Ages 18+) ▾	Nationality Nationality ▾		
* Email firstname.lastname@company.com	CC Email Enter email address	Username firstname.lastname@company.com	User group Your Company		
* Default language for emails English ▾	* Display currency British pound ▾	Time format ☒ 24 Hours ☐ 12 Hours	First day ☒ Sunday ☐ Monday		
Out of office ☐ I'm now out of office	Backup approver Select ▾				
Save Personal Details					

11

Contact information

Add their mobile number. This is the number airlines and hotels will use to reach them, so please make sure it is correct.

An emergency contact is also recommended. Click "Save Contact Information".

Please include the country code so they can be reached while travelling.

Sample Traveller

Your profile settings

Personal Details

Contact Information

Passports and Visas

Frequent Programs

Travel Preferences

Form of Payment

Mobile

+00 ▼ Area Phone number

Business phone

+00 ▼ Area Phone number

Fax

+00 ▼ Area Phone number

Home phone

+00 ▼ Area Phone number

Emergency contact

Name

Email

Mobile

+00 ▼ Area Phone number

Business address

Address

City

ZIP code / Post code

Country

Select ▼

Personal address

Address

City

ZIP code / Post code

Country

Select ▼

Save Contact Information

12

Passports and visas

Click "Add new passport", then enter their passport number, place of issue, nationality, date of issue and expiry date. Tick "Use as primary passport".

Add any visa they hold here too. Click "Save Passports and Visas".

Required for international travel. Please keep expiry dates up to date.

Sample Traveller

Your profile settings

Personal Details

Contact Information

Passports and Visas

Frequent Programs

Travel Preferences

Form of Payment

Passport

Add new passport

* Passport number

Passport number

* Issue at

Select

* Nationality

Select

* Valid until

DD MMM YYYY

* Date of issue

DD MMM YYYY

☐ Use as primary passport

Add new visa

Additional

Known traveller ⓘ

Known traveller

Redress number ⓘ

Redress number

Applicable country ⓘ

Select

Save Passports and Visas

13

Loyalty programmes

Add their airline, hotel, car hire and rail memberships so their numbers are applied automatically to every booking.

Click "Save Frequent Programs" when you are done.

Once saved, membership numbers are applied to every future booking automatically.

Sample Traveller

Your profile settings

Personal Details

Contact Information

Passports and Visas

Frequent Programs

Travel Preferences

Form of Payment

Frequent Flyer program

Add Frequent Flyer

Add external login

Travel pass number (TPC)

Hotel loyalty program

Add hotel loyalty program

☐ Special hotel rate

Other programs

Add car loyalty program

Add rail loyalty program

Add BahnCard loyalty program

Save Frequent Programs

14

Travel preferences

Record how they like to travel: preferred airline, cabin class, seat and meal type, home airport, hotel room and bed type, and car preferences.

Click "Save Travel Preferences".

Preferences are applied wherever they are available and within the company travel policy.

Sample Traveller

Your profile settings

Personal Details	Contact Information	Passports and Visas	Frequent Programs	Travel Preferences	Form of Payment
Flight preference					
Preferred airline carrier		Non preferred airline carrier		Class	
Select		Select		Select	
Seat type		Home airport		Meal type	
No preference		Enter airport location		Select	
		Additional flight information		Additional seat information	
Hotel preference					
Non preferred hotel vendor		Additional hotel information		Hotel room type	
Select				Select	
				Hotel bed type	
				Select	
Car preference					
Preferred car vendor		Non preferred car vendor		Car type	
Select		Select		Select	
				Car transmission	
				Select	
Save Travel Preferences					

You are all set

Your travellers' details will now pull through automatically every time you book for them, and you can update any profile at any time using these same steps.

Any questions?

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Uniglobe®
Gemini Travel

