

Self-Booking Tool (SBT) Tutorial: Add, Select or Modify a Default Charge Card in Your Travel Profile

Like any popular shopping site, the UW's Self-Booking Tool allows secure storage of purchasing cards, corporate cards, or other charge cards allowed by your institution.

For ease in reservation processing, charge card information can be entered and stored in the user's travel profile for payment of air, lodging and vehicles.

- Click Profile in the upper right of Concur, and then select Profile Settings
- Click the **Credit Cards** link to the left

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Hello, William		DO Required Approvals	00 View Trips		
TRIP SEARCH COMPANY NOTES					
Booking for myself Book for a guest Attention UW Madison Profiled Users: As of 01/05/2015 you must update your profile with a new division name under the					

• Under the "Credit Cards" section, click the Add a Credit Card link

Credit Cards	Go to top
You currently have the following credit cards saved with your profile.	
	[+] Add a Credit Card
You currently have no credit cards saved.	·

Note: The booking tool can accommodate multiple cards being securely stored for future bookings.

- Enter all required card information
- "Name" (i.e. My Corporate Card) a primary card to serve as the default for air
- You can also set the primary card as the default for car, and/or or hotel or establish other cards for these types of reservations (i.e. 1 card for air, 1 card for hotel, 1 card for vehicles)
- Default card(s) will be automatically charged
- Change any default card information in your profile, **prior** to making a reservation



Self-Booking Tool (SBT) Tutorial:

Add, Select or Modify a Default Charge Card in Your Travel Profile

- Add charge card information at any time, by clicking the Add a Credit Card link
- Save any charge card data as you add or update

Credit Cards	Go to top
You currently have the following credit cards saved with your profile.	
	[+] Add a Credit Card
You currently have no credit cards saved.	, A A A A A A A A A A A A A A A A A A A
Save	

Users that <u>do not</u> want to retain a default charge card in their travel profile must enter card information before each reservation can be completed. <u>If you have a default stored in your profile and want to change this, you must</u> <u>de-select default in your profile prior to starting a reservation</u>.

Note: The first time you pay for a reservation with a charge card, the booking tool will <u>automatically store</u> the card information in your profile. It will not be stored as a default.

For Travel Arrangers

You can set up your departmental card as the default for each traveler's airline tickets, utilizing the process above, and entering **your** card information into each of your traveler's profile. This allows your traveler's to self-book in the tool, with charges placed on your departmental card automatically.

All charge card information is encrypted within the user's travel profile for security purposes. Users should take care to keep charge card information up-to-date as expired charge cards will cause errors in the booking process.

Credit Cards	Credit Cards Go to					
You currently	have the following cre	edit cards saved with your profile.				
				[+] A	dd a Credit Card	
VISA	Concur Visa	xxxx-xxxx-xxxx-1111	Exp: 12/2016		1	
AMEX	New Card	xxxx-xxxx-xxxx-0028	Exp: 10/2016	٢	1	
VISA	Test Card	xxxx-xxxx-xxxx-1111	Exp: 12/2016		1	