Southwest Business

www.swabiz.com



SWABIZ[®] User guide

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Introduction & enrollment: SWABIZ[®] key features

SWABIZ is Southwest Airlines[®] business booking tool/website that automatically tracks and reflects all transactions through a suite of reports.

- Free!-Free to enroll and no annual, license, transaction, or report fees.
- Air–Southwest complete fare inventory* and last-seat availability.
- Car–All major rental car companies.
- Hotel-Hotel inventory provided in partnership with Booking.com.
- **Traveler Accounts**–Travelers can book their own reservations using their SWABIZ Traveler Account, which is the same Rapid Rewards® account used for leisure travel on **Southwest.com**®.
- **Company Travel Manager (CTM)**–CTMs can book/change/cancel reservations using Traveler Accounts, run reports, add/remove other CTMs, manage Ghost Cards, and more!
- **Ghost Cards**–A stored credit card that Travelers and TMs may use to make reservations, without exposing the cc's account and billing information. Can be configured for direct billing.
- Internal Reference Numbers (IRN)—An alpha/numeric value that can be added to a reservation to define the trip's purpose, group, or other identifying needs. The SWABIZ Master Report can be sorted by IRNs, lumping all like-IRNs together.
- **Reports**–All SWABIZ transactions are reflected in various reports so companies may track travel spend, booking activity, reservation details, unused travel funds, and duty of care responsibilities.

*Based on adult Passenger Type. child, youth, & government fares not available on SWABIZ or Southwest.com



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Introduction & enrollment: enrollment



Create an Account



At the end of the enrollment process, an eight digit SWABIZ Company ID# will be issued that your Travel Managers and Travelers will use to access your company's SWABIZ account.

Once enrolled and having established a Travel Manager account, it's time to set up your account according to your preferred booking practices and travel policies. But first, let's define the two types of SWABIZ Travel Managers and their respective capabilities...



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Account setup: SWABIZ[®] Travel Manager

- A Travel Manager books travel on behalf of others (proxy booking), manages travel policy, Ghost Cards, duty of care, and generates reports.
- There are two levels of access for Travel Managers:
 - Limited-access Travel Manager
 - ✓ Proxy Bookings
 - Full-access Travel Manager
 - ✓ Proxy Bookings
 - ✓ Generate Reports
 - ✓ Manage Ghost Cards & IRNs
 - ✓ Manage Travel Policy
 - ✓ Add/Remove Travel Managers
 - ✓ Grant/Revoke full access for TMs
 - ✓ Remove Travelers
 - ✓ Opt-in for all receipt emails
- Each SWABIZ account must have a minimum of one full-access Travel Manager but may have as many full and limited-access Travel Managers as needed.

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nd more.

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Account setup: adding Travel Managers

Need to add more Travel Managers to your account? You can add as many full and limited-access Travel Managers as needed. Here's how...

 Log in as a full-access Travel Manager Click TRAVEL SETTINGS Select Company Profile 	Southwest Business	FLIGHT HOTEL CAR	MANAGE TRAVELERS	PAYMENT REPORTING	TRAVEL SETTINGS
 Click <u>Modify</u> Scroll down to find and 	view (i modii y				
6) To grant full access to a	Company Travel Manager * First * Last Suffix Select V				
Travel Manager, be sure to check this box.	By selecting this box, you will grant this Corporate Traver reporting). Travel managers without Full Access will only be	rel Manager with Full Access to able to book on behalf of travel	SWABIZ (access to manage lers.	e company travel policy, ghos	t cards, IRNs, and
Limited-access Travel Managers.	* Address Line 1 Address Line 2				
	* City * State Select Your Province * Zip Code	~			
7) A CTM 'create password' email will be automatically sent to the address you enter here.	* Phone				
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Account setup: three ways to book on SWABIZ®

Before discussing Traveler Account creation, let's first determine your preferred booking method. SWABIZ allows you one or any combination of three different ways to book.

Guest	Registered Traveler	Travel Manager via proxy
Traveler Travel Manager	Traveler Travel Manager	Traveler Travel Manager
* Required	*Required	*Required
COMPANY ID NUMBER *	COMPANY ID NUMBER *	COMPANY ID NUMBER *
99123456	99123456	99123456
✓ Log in with my Rapid Rewards [®] account	▲ Log in with my Rapid Rewards [®] account	FIRST NAME *
Remember me Not a Rapid Rewards member?	RAPID REWARDS ACCOUNT NUMBER OR USERNAME *	Jim
Enroll now Continue	122312581	LAST NAME *
	PASSWORD *	Hansen
No account number or		PASSWORD *
password required.	Need help logging in? Remember me	•••••
	Enroll now Log in	Need tale leading in 2
		Log in

Note: A Company ID# is required for all three types of bookings.

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Account setup: three ways to book on SWABIZ®

<u>Guest</u>

Pro:

 ✓ Quickly book using only the Company ID# to access company account. Traveler account number and password not required

Con:

- Must manually fill in all reservation fields
- Cannot use Ghost Cards

Note: If you use a program called **BOOKING**BUILDER, your SWABIZ account must be configured to allow Guest bookings. Traveler profile and payment info will be automatically entered by **BOOKING**BUILDER.

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Registered Traveler

Pro:

- RR profile info (name, RR#, DOB, etc.) prepopulates into reservation, providing a more efficient booking experience
- ✓ Able to use Ghost Cards
- ✓ Traveler earns Rapid Rewards[®] points, despite who the purchaser is
- ✓ Rapid Rewards tier status applies (e.g. A-List)

Con:

- Requires a one-time setup
- Requires login each time

Note: The use of Traveler Accounts can be required by a Travel Manager, thereby preventing bookings *by a* Guest. Travel Managers can still book *for* Guests. The Traveler information is accessible by the Travel Manager.

Travel Manager via *proxy

Pro:

- ✓ Access/pre-populate Traveler Account info into reservation record
- ✓ Able to use Ghost Cards for registered Travelers

Con:

 Ghost Card cannot be applied to a Guest(s)-only booking

***Proxy** – Booking travel for someone using their Traveler Account



Account setup: SWABIZ® Traveler Account

🔍 LOG IN

CHECK IN

Creating a SWABIZ Traveler Account

- A SWABIZ Traveler Account is an individual's Rapid Rewards[®] (RR) account that has been linked to a SWABIZ Company ID (CID) number.
- To link a Rapid Rewards account to a SWABIZ CID#, the Traveler/RR Member simply logs in under the Traveler tab using your company's CID# and their own RR account number and RR password. The traveler will have to consent to the sharing of their information.
- Only one RR account should be used for both leisure and business travel.
 - SWABIZ reports do not reflect leisure transactions that exclude a SWABIZ CID#
 - CTMs cannot see/use a Traveler's RR points
 - Having one RR account maintains a single and total sum RR points balance, versus dividing the points balance among multiple accounts
 - Having two or more RR accounts can cause various errors in the user experience.



FLIGHT STATUS

CHANGE/CANCEL

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Account setup: Travel Manager features (full-access)

Upon login, full-access Travel Managers (TM) will see the following navigation links across the top TM home page. Below is a short summary of each link's functionalities.



Business

FLIGHT | HOTEL | CAR MANAGE TRAVELERS PAYMENT REPORTING TRAVEL SETTINGS

Flight, Hotel, Car	Manage Travelers	Payment	Reporting	Travel Settings
 Flight, hotel, and car booking tools Manage existing reservations Route Map Flight Schedule International travel info and forms 	 Generate list of all Traveler accounts associated with your CID# Remove traveler accounts Help 	 Ghost Card management Add/remove GCs Require GCs and traveler accounts Assign GC permissions Internal Reference Numbers (IRN) Set IRN usage rules Require IRNs and traveler accounts Add, modify, remove IRNs Help 	 Air Travel Reports Hotel Travel Report Car Travel Reports Travel Funds Report Help 	Manage/Modify: Company profile Travel policy Travel Manager account Help

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Account Setup: Travel Manager: Payment - Ghost Cards

Before exploring all of the sections and links mentioned on the previous page, let's continue setting up your account.

Once you have at least a few Traveler Accounts associated with your SWABIZ[®] account and wish to use SWABIZ Ghost Cards (optional), you may begin adding one or more of your company's credit cards as Ghost Cards (GC) and assign permission to the travelers you wish to be able to use the card(s). Travel Managers use GCs by accessing Traveler Accounts that have been authorized use GCs. GCs are located under the **PAYMENT** section.

- Add-Add as many Ghost Cards (GC) to a SWABIZ account as needed. All major CCs accepted, including UATP
- Assign–Assign Ghost Card permission to a Traveler Account on a per card, per Traveler basis
- View/Modify–View list of stored GCs. Modify card name, billing address, and exp date. Delete card.
- · Reports-View/download report depicting general card info, authorized users, and permission settings

Add | Assign | View/Modify | Reports

Ghost Card Management

About Ghost Cards

The Ghost Card Management feature allows Travel Managers to manage their SWABIZ travel purchases without revealing credit card information to their travelers. Additionally, the Travel Manager will have the flexibility to assign credit card use to select travelers or require credit card use to all travelers. Travel Managers will also have the capability to add multiple Ghost Cards to the profile, view/modify Ghost Card information and generate Ghost Card Reports.

Please note that Ghost Cards do not apply to transactions made through other channels (e.g. southwest.com, mobile app, SouthwestHotels.com, etc.).

For suggestions on Ghost Card setup and usage, view the Travel Manager demo.

Will all Travelers be required to use Ghost Cards only?

By checking this box, your company's Travelers will be required to create and use a Traveler Account and use an assigned Ghost Card in order to book air travel. Travel Managers will be required to use the same assigned Ghost Card(s) in order to proxy book (book on behalf) for those Travelers; however, Travel Managers will not be required or allowed to use a Ghost Card when booking travel for guests.

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Submit

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Payment: Ghost Cards - Permission Assignments

- Only full-access Travel Managers can assign Ghost Card (GC) permissions
- GC permissions are assigned to Traveler Accounts per credit card
- There are three different permission settings for Ghost Cards...

Add | Assign | View/Modify | Reports

Assign Chost Card

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Assign Ghost Ca	iu ii				
Changes made to a Traveler's N	lame, Email Address, and/or Phone will r	not be reflected here until the day	after a change is made.		
Name	Credit Card Type	Credit Card Numbe	r	Man	iage
Bogus Visa	Visa	XXXXXXXXXXXXXXXXXXXX	11	3/2	2022
			Not Allowed To Use	Allowed To Use	Required To Use
Name	Email Address	Phone	Deselect All	Allow All	Require All
ADTANI, SELINA	selinaadtani@	469-544-	۲	0	0

- Not Allowed To Use–This is the default permission when the GC is first added to a SWABIZ[®] account. It is also the default permission setting for all new Traveler Accounts added to the SWABIZ account.
- Allowed To Use-A purchaser may choose to use the GC, or select an alternate form of payment.
- Required To Use—The purchaser is required to use the GC. The ability for the purchaser to select the GC or a different GC is removed, as is the option to manually enter a credit card, making it a "direct bill" transaction. If "Required to Use" is assigned to two or more GCs for a traveler, then the purchaser will see the applicable GCs in a drop-down box. Only one can be selected.

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Travel Manager: Payment - Internal Reference Numbers

In the **PAYMENT** section, you'll also find **Internal Reference Numbers** (IRN), which are optional or, as a Travel Manager, you may choose to require them for each booking. An IRN is an alpha/numeric value you or your travelers create to associate with a particular reservation. Whether that's to identify the purpose of travel, a cost center, division of the company, or any other reason you may need to identify a particular subset of reservations within your organization. The SWABIZ® Master Report can be sorted by IRN, making it easy to lump and quickly assess the cost for a given subset.

- Add–Travel Managers can create IRNs for travelers to choose from a drop-down box on the Passenger and Payment page.
- View/Modify-View list of stored IRNs. Modify the IRN and/or description. Delete IRN.

Add | View/Modify

Internal Reference Numbers

About Internal Reference Numbers

The Internal Reference Number feature allows Travel Managers to more effectively record expenditures by department or project, under the assigned SWABIZ CID#. With this option, Travel Managers can provide a list of Internal Reference Numbers for their travelers to choose from, or allow their travelers the option of adding in their own unique reference number. The Internal Reference Number may be set as a required field that must be populated in order to complete the SWABIZ reservation.

Will all Travelers be required to use Internal Reference Numbers (IRNs) in order to book travel?

- Yes. All travelers must select from Company-Defined IRNs. (Requires Traveler Account login.)
- Yes. All travelers must select from Company-Defined IRNs or enter an alternative IRN.
- O No. Travelers are not required to enter IRNs.

Submit

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Travel Manager: Payment - Internal Reference Numbers

Adding a new IRN allows the Travel Manager to also add a description for whomever to see in a drop-down box when making the reservation.

Add Internal Reference Numbers

* Denotes required fields.
* Internal Reference Number ¹
2013007
Description
Cost Center
¹ Up to 20 observators. Latters and sumbers and . Disease amit superioritism, appendiate and appendes. An internal reference number is a unique number used for

¹Up to 30 characters. Letters and numbers only. Please omit punctuation, special characters, and spaces. An internal reference number is a unique number used for your company's internal reporting purposes. This number may be cost center, billing number, etc.

Submit Submit and Add New IF	٦N
------------------------------	----

🖹 Do you have an in	ternal reference number	r?
An internal reference number is a unique number and numbers only). Please omit punctuation, spo	r used for your company's internal reporting purposes. TI ecial characters, and spaces. An IRN is required for this p	his number may be up to 30 characters (letters purchase.
Existing internal reference number	2013007 - Cost Center	•
○ New internal reference number	Select IRN	
	2013007 - Cost Center	
	CHEM - Chemistry Department	

How it appears on the Passenger and Payment Info page when making the reservation.



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Travel Manager: Travel Settings – Travel Policy

Under TRAVEL SETTINGS, you can manage your company's Travel Policy for hotels and cars.



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Account Setup: Confirmation Receipt Emails

Confirmation receipt emails

Includes confirmation number, flight itinerary, ticket number, total cost, and fare, Passenger, and payment information. Only <u>one</u> confirmation receipt email is sent per reservation. However, up to four full-access SWABIZ[®] Travel Managers can opt-in to receive a copy of all confirmation receipt emails for new bookings, changes, and cancellations. <u>Details on next page</u>.

Booking as a guest

Email must be manually entered for the confirmation receipt email.

Booking as a traveler or Travel Manager via proxy

The "Primary" e-mail address stored in the registered traveler's account will automatically prepopulate in the "Saved email" field. However, this can be overridden by selecting "New email" and manually entering a new email address.

Send your receipt Let us know where to send your confirmation receipt. Saved email joe.sample@email.com New email

Flight itinerary/Passenger only emails

While only one confirmation receipt email can be sent per reservation, up to four flight itinerary/Passenger only emails can be sent in addition to. This email includes only the confirmation number, flight itinerary, and Passenger information. Perfect for sharing with family, friends, executive assistant, administrative staff, etc.

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C Share your plans

e il email your travel details to the addresses you enter below.	
EMAIL 1	EMAIL 2
EMAIL 3	EMAIL 4



Account Setup: Travel Settings – Travel Manager Account

The Travel Manager account link	
on the page header or My Travel Manager Account under TRAVEL SETTINGS will take you to a page where you can View/Modify Password Reset My Account Information	
Change your TM password <u>* Required Field</u>	
Current Travel Manager Password (required to make change) Passwords are case sensitive.	
Account Information for BRADY CARL	
 Update street address, phone number, and e-mail address Address Line 1* 2702 Love Field Drive 	
Address Line 2 Hdq 5md	
City * State * Zip * Dallas Texas 75235	
 Up to four full-access TMs per SWABIZ® account can opt-in to Phone * 2147924000 	
receive a copy of all confirmation	
receipt emails for initial bookings, jim.sundberg@txrngr.com	eipt E-mails
cancellation transactions Submit	
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Booking: Guest

Whether you're booking a reservation for yourself and/or others, or you're booking on someone's behalf, guest bookings require the least amount of steps to begin booking a reservation.



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Booking: Traveler Account

Booking a flight reservation using a SWABIZ[®] Traveler Account takes two extra entries to begin but ultimately fewer steps to complete a reservation as info from your Traveler Account (a.k.a. Rapid Rewards[®] account) will auto-populate in all the appropriate fields (i.e. name, DOB, RR#, KTN, etc.). If you don't have a Rapid Rewards account, you can enroll right from the login page.

1 Select Traveler tab, enter Company ID Number, Rapid Rewards number, and Rapid Rewards password, and click Log in.	2 Book itinerary, sele fares and flights.	ecting the preferred	3 Complete Passenger & Payment Info page, click Purchase to confirm and ticket the reservation.			
Traveler Travel Manager		🕽 FLIGHT STATUS 😝 CHANGE/CANCEL	Passenger & Payment Info	Payment Confirmation		
* Required	Round trip One-way DEPART ARRIVE DEPART DATE	Baggage and optional fees Dollars Points RETURN DATE PASSENGERS	Flight details Modify			
COMPANY ID NUMBER *	DAL HOU 1/12 Dalias (Love Field), TX - DAL Houston (Hobby), TX - HOU Tue, Jan 12, 202	1 Thu, Jan 14, 2021 Age 2+	Tue 1/12 DAL → HOU 1 hr 10 min Nonstop Wmms Get Away 6 ////////////////////////////////////	Price per Passenger \$97.76 Taxes and fees per Passenger \$20.20		
99123456		PROMO CODE (Optional) Advanced search Search	Image: Thu 1/14 HOU → DAL 1 hr 5 min Nonetho Warna Old Away 0 8.00 AM 9.05 AM 9.05 AM 1 hr 5 min Nonetho Warna Old Away 0 1 hr 5 min Nonetho No Nonetho No N	Total per Passenger \$117.96 Passenger(s) x1 Flight total \$117.96		
Log in with my Rapid Rewards [®] account	Departing flights & & Charge places	Business Select⊕ Anytime Wanna Get Away ⊕	★ Who's flying? Please make sure names match government-issued IDs.			
rapid rewards account number or username * 1798765432	7:30AM ♦ 8:40AM 10 time 9:30AM ♦ 10:45AM Duration	\$284 \$254 \$59 \$284 \$254 \$59	* Required PRST NAME * MODULE NAME LAST NAME *	Suffix Select		
PASSWORD *	Nonstop ± 17 11:00 _{AM} → 12:10 _{PM} th 10m	• \$284 \$254 \$59	DATE OF BIRTH* GENORE * RAPID REWARDSBIACCOUNT #			
••••••	Notation ≠ 27 1:00 pM ⇒ 2:10 pM In 10m	\$284 \$254 \$59	Lock in this fare today. You can always change' or cancel ² later without a fee. TRIP TOTAL	\$0.00 \$97.76 \$20.20 \$117.96		
Need help logging in? Remember me	3:00 _{PM} → 4:15 _{PM}	\$284 \$254 \$59	"The definition of the grade of a field the land of a restriction of a start (1) method in prior is included in departure may read in the balance frame function.	Show price breakdown		
Not a Rapid Rewards member? Enroll now Log in	Remoting #41 4:30 pM ⇒ 5:45 pM 10:15m	• \$284 \$254 \$59	Foderal law forbest the cartigor of hardward har	portation of hazardous materials arials such as aerosols, freworks, lithium zatäli nyour checked or carryon baggage ja must be transported in carryon baggage tyou understand the hazardous materials atlies. <u>View more on hazardous materials</u>		
	$\textbf{6:00}_{\text{PM}} \rightarrow \textbf{7:10}_{\text{PM}} \qquad $	\$284 \$254 \$59	By clicking 'Purchase', I agree to the Terms and Conditions below, the privacy policy, fare in	rules, and the contract of carriage.		
				Purchase		

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Booking: Travel Manager Proxy Booking

Booking travel for others using their Traveler Account is a cinch!

1 Select Travel Manager tab, enter Company ID Number, name, and Password, and click Log in.

Passenger & Payment Info - 🖸 Already enrolled? Book 🛪 Flight 🏨 Hotel 🚘 Car CHECK IN 🕓 FLIGHT STATUS (CHANGE/CANCE Log in to start booking, view travel itineraries, and more. Round trip One-way Flight details Modif Dollars () Points DEPART ARRIVE DEPART DATE RETURN DATE PASSENGERS Traveler Travel Manager DAL HOU 1/12 1/14 1 2 DAL HOU Tue 1/12 8-40 AM Tue. Jan 12, 2021 Dallas (Love Field), TX - DA Thu, Jan 14, 2021 Age 2+ * Required 👩 Thu 1/14 HOU DAL 1 hr 5 mir Advanced search Search 8-00 AM 9-05 AM COMPANY ID NUMBER 99123456 Departing flights 😪 = Change planes Wanna G Away ⊗ Anytime ★ Who's flying? fonstop # 7:30 AM > 8:40 AM FIRST NAME \$284 \$254 \$59 Require Nonstop = 1 Brett 9:30AM → 10:45_{AM} \$284 \$254 \$59 MIDDLE NAM -Nonstop # 1 LAST NAME 11:00_{AM} → 12:10_{PM} DATE OF E ^{\$}284 \$254 \$59 **Sanders** Nonstop # 27 Lock in this fare today 1:00_{PM} → 2:10_{PM} \$284 \$254 \$59 You can always change¹ or cance ater without a fee \$117.96 TRIP TOTAL Nonstop # 35 PASSWORD * 3:00_{PM} → 4:15_{PM} \$284 \$254 \$59 4:30_{PM} → 5:45_{PM} \$284 \$254 \$59 Nonstop # 4 Need help logging in? Remember me 6:00_{PM} → 7:10_{PM} \$284 \$254 \$59 Log in Purchase

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Book itinerary, selecting the preferred fares and flights.

3 Complete Passenger & Payment Info page, click Purchase to confirm and ticket the reservation.

\$97.76

\$117.96

\$117.96

\$97.76

\$20.20

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x1

Booking: Passenger & Payment Info Page

Let's take a closer look at the **Passenger & Payment Info** page, as it has some features unique to SWABIZ[®].

As a quick refresher, a TM controls how and if IRNs should be used:

- Yes. All travelers must select from Company-Defined IRNs. (Requires Traveler Account login.)
- Yes. All travelers must select from Company-Defined IRNs or enter an alternative IRN.
- No. Travelers are not required to enter IRNs.

If the CTM selects "No" or the middle "Yes", the traveler will see this on the **Passenger & Payment Info** page:

Do you have an internal reference number?							
An internal reference number is a unique number and numbers only). Please omit punctuation, sp	er used for your company's internal reporting purplecial characters, and spaces.	Doses. This number may be up to 30 characters (letter	rs				
 Existing internal reference number 	Select IRN	•					
 New internal reference number 							

If the CTM selects the first or top "Yes":

- 1) The "New internal reference number" option is removed.
- 2) Traveler Account login becomes required, which, for BookingBuilder users, would make the SWABIZ account incompatible.



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Booking: Passenger & Payment Info Page

The **Credit Card & billing information** section offers some form of payment options that are very helpful for business purchase scenarios–primarily, the Ghost Card (GC).

If a traveler has been granted permission and is "Allowed to Use" one or more GCs, the traveler will see this...

Credit card & billin	g information	
* Required Only credit cards that have been stored un Southwest uses a TLS connection to transmit	Select an account Garys Personal CC - PRIMARY Co Name Corp Card (Corporate) Exec Corp Card (Corporate)	he saved credit card/account option.
Saved credit card/account Co Name	Corp Card (Corporate)	•
O New credit card		

In the above example, the traveler has a credit card stored in his *Traveler (RR) Account* and designated it as his "PRIMARY" card. He is also "Allowed to Use" two GCs, which means he doesn't *have* to use it and could select his PRIMARY card or choose "New credit card" to manually enter a credit card for a different and non-stored card. Note that GCs are easily identified by the (Corporate) tag.

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Booking: Passenger & Payment Info Page

If the Ghost Card permission has been set to "Required To Use", then this is what the Credit Card & billing information section will look like...



Notice the credit card selection drop-down box and the "New credit card" option to manually enter a credit card are removed.

When a GC is "Required To Use", the user cannot select other GCs, a personal CC, or manually enter a new CC. The transaction becomes a "direct billing" transaction, automatically charging the GC that has been required to use, without the purchaser having to make any sort of billing selection or decision. If two or more GCs are set to "Required To Use", then all applicable GCs will appear in a drop-down box for the Purchaser to choose one.

Whether a GC is allowed or required to use, unused travel funds, Southwest LUV vouchers[®], and gift cards can still be used with a credit card/Ghost Card within a single reservation. But only one CC/GC can be applied per reservation.



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Passenger & Payment Info Page – Proxy Booking

For a Travel Manager booking on behalf of a traveler, this page has a few more options.

To apply a registered traveler's info* to a reservation, enter at least two letters of the traveler's name. A list of registered travelers that match the letters entered will pop up. Enter more letters to shorten the list of names or select the preferred name and click 'Apply'. This can be done for up to eight registered travelers per reservation.

For multi-Passenger reservations, any stored Ghost Card(s) for Passenger 1 serves as the default and can/will be used to pay for the entire reservation. But the payment options available to a different Passenger may be selected by clicking "Assign payment responsibility". For single-Passenger reservations, any Ghost Cards and personal/business stored credit cards can be selected from a drop-down box, depending on whether Ghost Cards are required or not.

Guests can also be booked in the same reservation as other registered travelers.

TRAVELER			DATE OF BIRT	H GENDER	RAPID REWARDS®/ACCT #
Uncle Sam		Modify	On file	On file	On file
 Secure traveler information 	ion 🚺				
 Special Assistance 					
assenger 2 (Adult)	Assign payment respon	sibility			
Traveler Guest					
Traveler Guest					
Traveler Guest			4	Select th Passen	ne Guest tab to book f
Traveler Guest				Select ti Passeng Travelet	ne Guest tab to book f ger without a registere r Account.
Traveler Guest	Assian payment respon	sibility	4	Select th Passent Travelet	ne Guest tab to book f ger without a registere r Account.
Traveler Guest IRAVELER * Search by name Passenger 3 (Adult)	Assign payment respon	sibility	2	Select th Passeng Traveler	ne Guest tab to book f ger without a registere r Account.
Traveler Guest TRAVELER * Search by name Passenger 3 (Adult) Traveler Guest	Assign payment respon	sibility		Select th Passent Travelet	ne Guest tab to book f ger without a registere r Account.
Traveler Guest IRAVELER * Search by name Passenger 3 (Adult) Traveler Guest FIRST NAME *	Assign payment respon	isibility		Select ti Passent Travelet	ne Guest tab to book f ger without a registere r Account.

*Traveler's info includes name, DOB, gender, RR#, and if stored in RR account, TSA Pre-Trip and/or Redress number(s). For Travel Manager proxy bookings, payment information stored in a Traveler (RR) Account only applies to single-passenger reservations.

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Booking: Hotel & Car Reservations

After logging in, whether as a guest, traveler, or Travel Manager, you may begin your hotel or car reservation from the booking tool on the home page.

Book 🛪	Flight	🛱 Hotel 🖸	Car	O CHECK IN	🕓 FLI	GHT STAT	us 😰	Change/C/	ANCEL	
Round trip O	One-way	ARRIVE		DEPART	DATE	В	aggage and o RETURN DAT	ptional fees E	⊙ Do	Ilars O Points PASSENGERS
DAL		LAX		2/1	6		2/18		Ē	1 &
Dallas (Love Field), TX	- DAL	Los Angeles, C/	A - LAX	Tue, Feb	16, 2021		Thu, Feb 18, 2	021		Age 2+
					PR	OMO CODE	(Optional)			
								Advanced	l search	Search

Hotel

- SWABIZ[®] utilizes Booking.com's hotel search/booking engine, which defaults to business-friendly properties (i.e. WiFi, hotel shuttle, business center, etc.)
- The search default can be overridden by customizing your own search/property criteria
- Rapid Rewards[®] properties available
- Hotel and car reservation data is captured and reflected in their respective SWABIZ reports

Car

- All major car rental companies are available for purchase through SWABIZ
- Credit card not required when reservation is created
- Use <u>advanced search</u> option to enter promo codes and frequent renter numbers and enter other information to further refine your search and shopping experience.

Use advanced search for promo codes

Show advanced search options
Southwest

Business



SWABIZ[®] Features: Change/Cancel

Of course, with Southwest[®], there's never a change fee¹. The Change/Cancel link allows you to...

- Change outbound and/or return flight(s)
- Cancel a single bound or entire reservation
- Hold unused funds² for use on a future Southwest flight
- Request a refund for the refundable balance of the reservation

The Change/Cancel links have been placed in multiple locations throughout the site to make it easy to find.

- Home page
- Booking tool
- Confirmation page
- Atop most pages under the **FLIGHT | HOTEL | CAR** link

Changes/Cancellations can also be made through...

- ³Southwest.com[®]
- ³Southwest.com mobile or app



X Flight

Book a Flight

Manage Reservations

Route Map

Flight Schedules International Travel

≞ Hotel ^ø

Book a Hotel ☑ Manage Reservations ☑ Best Rate Gaurantee Why Book With Us? 🛱 Car

Book a Car Manage Reservations Why Book With Us?



¹Fare difference may apply. ² Unused travel funds are valid for one year from date of original purchase.

³Ghost Card not accessible.



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SWABIZ[®] Features: SWABIZ Mobile

SWABIZ[®] offers the following features through Southwest.com mobile...

- Book a flight (mobile web browser only)
- Purchase flight with a Ghost Card* (mobile web & app)
- Change flight itinerary (mobile web & app)
- Cancel reservation (mobile web & app)
- Add EarlyBird Check-in (mobile web & app)
- Flight check-in (mobile web & app)

Booking a new SWABIZ flight through Southwest.com mobile is easy! Just go to Southwest.com[®] in your mobile device's web browser, and after logging into your SWABIZ Traveler Account (a.k.a. MyAccount), simply slide the "SWABIZ account" switch to the right, and begin booking your SWABIZ reservation.

The "SWABIZ account switch" is only used for new SWABIZ flight reservations. It does not have to be used to change, cancel, or add EBCI to existing SWABIZ reservations.

*Ghost Card usage/access is managed by your Company Travel Manager.



Southwest's Business

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SWABIZ® Features: Travel Manager features (full-access)

Having reviewed the Payment and most of the Travel Settings sections, let us now take a closer look at **Manage Travelers** and **Reporting**.



Business

FLIGHT | HOTEL | CAR MANAGE TRAVELERS PAYMENT REPORTING TRAVEL SETTINGS

Southwest'

Business

Flight Hotel Car	Manage Travelers	Payment	Reporting	Travel Settings
 Flight, Hotel, & Car booking tools Manage existing reservations Route Map Flight Schedule International travel info & forms 	 Generate list of all Traveler Accounts associated with your CID# Remove Traveler Accounts Help 	 Ghost Card Management Add/Remove GCs Require GCs & Traveler Accounts Assign GC Permissions Internal Reference Numbers (IRN) Set IRN usage rules Require IRNs & Traveler Accounts Add, Modify, Remove IRNs Help 	 Air Travel Reports Hotel Travel Report Car Travel Reports Travel Funds Report Help 	 Manage/Modify Company Profile Travel Policy Travel Manager Account Help

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SWABIZ® Features: Manage Travelers

Generate list of all registered Travelers associated with your SWABIZ Company ID#

- Entering a name completely or partially will yield a name match. Leaving the Name fields blank and clicking 'Generate Report' will show all Travel Accounts associated with the SWABIZ CID#.
- Keeping Card Name defaulted to "Select Ghost Card", instead of selecting a specific Ghost Card (GC) will show a list of <u>all</u> Travelers associated to the CID#. Selecting a specific GC will only show registered Traveler names that have been granted permission to use the selected GC.

Search Traveler Accounts

Search Criteria	
Last Name	First Name
Card Name Select Ghost Card V	

Please Note:

Searches can be performed using full or partial name entry. Leave the Name fields blank to generate a list of all registered Travelers.

If a Traveler's Name, Email Address and/or Phone is changed in their profile, the changes will not be reflected in search results until the following day.

Report Format

Please choose the report format.

View in browser (HTML)

Download for spreadsheet or database (ASCII, Comma Delimited)

Generate Report



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SWABIZ® Features: Manage Travelers

• After clicking the 'Generate Report' button on the previous page, this report is shown...

Traveler Account Search Results

Attn: The 'Book' and 'Change' buttons have been intentionally removed. You may now book, change, and cancel for registered Travelers & Guests from the Travel Manager home page.

Changes made to a Traveler's Name, Email Address, and/or Phone will not be reflected here until the day after a change is made.

$\underline{A} \ \underline{B} \ \underline{C} \ \underline{D} \ \underline{E} \ \underline{F} \ \underline{G} \ \underline{H} \ \underline{I} \ \underline{J} \ \underline{K} \ \underline{L} \ \underline{M} \ \underline{N} \ \underline{O} \ \underline{P} \ \underline{Q} \ \underline{R} \ \underline{S} \ \underline{T} \ \underline{U} \ \underline{V} \ \underline{W} \ \underline{X} \ \underline{Y} \ \underline{Z}$

Name				Email Address			Rem	ove
CABOOSE, ZEUS	<u>3</u>		nick.engberg@wnco.com		817-875-7474]	
CAGE, LUKE			test@test.com			668-589-2630		1
CAKE, CHEESE	CAKE, CHEESE			m		212-343-5678]
Clicking the name will show the following Traveler Info and GC permission table						Click bo	ox to	
Account Information	tion						check r	nark
Traveler:	CHEESE CAKE						next to	the
Email Address:	absarj@gmail.com						Travele	r
Phone:	212-343-5678						Accour	t vou
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Ghost Cards		Not Allowed To Use		Allowed To Use	Rec	uired To Use	romovo	from
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa	aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa							
Amex								VABIZ
brand new visa		0		۲		0	accoun	t.
Page 30							Southw	est

Business

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SWABIZ[®] Features: Reporting

Air Travel Reports

- Monthly Travel Booked Spend Report: Lists number of segments, base fare, and average price for travel per month.
- **Master Report**: Listing of all reservation transaction details for initial bookings, changes, cancellations, and refunds.
- o Traveler Tracking Report: Passenger name, contact info, and flight itinerary details to support "Duty of Care" responsibilities.
- **Booked O&D Summary Report**: Summary of top market pairs, cost, and average fares for all markets booked.

Hotel Report

- Master Report depicts following information...
 - Transaction Date
 - Confirmation Nbr
- Property Addr

- Guest Name

- Check-in Date - Status (Active/Canceled) - Base Rate Total
- Credit Card Type
- Check-out Date
- Company ID

- Avg Nightly Rate

• Car Reports

- Master Report: Listing of all reservations and their details.
- o Monthly Car Rental Travel Spend by Company: Lists number of rental days, booked rental costs, and average daily rate.
- Company Car Rental Travel Spend per Date Range: Data same as previous report but by date range than per month.

Travel Funds Report

- Depicts following information...
 - Passenger Name
 - Company ID
- Confirmation Number
 - Ticket Number - Expiration Date
 - Unused Travel Funds Balance

- Hotel Property

- Only depicts travel funds associated with a CID#. In other words, a Traveler's "leisure" funds are not shown on report.
- Unused funds are valid for one year from date of original purchase. Expired travel funds are not shown on report.



SWABIZ® Features: Reporting

General Report Information

- SWABIZ stores report data up to 25 months. Excludes Travel Funds Report as travel funds are valid for only one year.
- Air reports are based on *booked*, not *flown* data. Air Master Report does not depict ticket usage.
- Report format available in HTML format for screen view, and Excel-ASCII, Comma Delimited format to download/share/customize report.





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SWABIZ® Features: Company Profile

FLIGHT | HOTEL | CAR MANAGE TRAVELERS PAYMENT REPORTING TRAVEL SETTINGS

When logged in as a full-access Travel Manager, under TRAVEL SETTINGS, on the Company Profile page you'll find the following information and options:

- General information about the company, such as the company name, address, email, phone, and Travel Managers
- o Click the Modify link to...
 - > add/remove other Travel Managers(TM)
 - grant/revoke full access for other TM
 - modify company address, phone, and Company Contact Email
- Company Contact Email–When a new Traveler Account is created, an email is automatically sent to the "Company Contact Email" address, alerting the TM that the named Traveler has created a registered Travel Account with their SWABIZ account. This serves as a prompt for the TM to verify it is a known Traveler and to assign Ghost Card permission, if applicable.

Company Information

Wallys Widget World 1234 Main Street Dallas, TX 77281 Phone: +1 2145558000 Office Type: Home Company Account Type: Corporation Company Contact E-mail: wally@widgetworld.net

• **Company Name**–Cannot be edited except by calling the SWABIZ Help Desk at 888-479-2249.



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SWABIZ® Features: Travel Manager Help Pages

There is a **Help** option for each section a Travel Manager may choose. In the image to the right, clicking on Help would direct the Travel Manager to a Help page that discusses Ghost Card management and Internal Reference Numbers. If clicking Help from the REPORTING tab, Help pages would discuss all things related to SWABIZ reports, and so on.



Travel Managers may also call the SWABIZ Help Desk (888-479-2249) for additional assistance.



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SWABIZ® Features: Duty of Care

SWABIZ offers different Duty of Care elements through its various reports. In addition to Air, Hotel, and Car reservation information, SWABIZ's (Air) Master Report and Traveler Tracking Report offer a "Day of Travel Contact Info" column that lists the Traveler's email or phone number. However, because the Traveler is not required to provide this information, the cell on the aforementioned reports could be left blank. Currently, <u>only Travelers</u> can add this information by saving it within their Traveler (RR) account.



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Frequently Asked Questions

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FAQ

Reoccurring Errors

Error:

Error Message: We are unable to process your request. Please try again.

Error Message: An undefined error occurred. Please try again.

In cases where such errors keep occurring over and over again, it may be because the error message is "stuck" in your temporary internet files (cache), so that every time you try again, your internet browser shows you a screenshot of the previously visited page with the error message, versus reloading the web page fresh, thus giving the illusion that an error is happening every time.

Solution:

In many cases, this problem can be resolved by deleting your temporary internet files, browsing history, cache, etc. While deleting cookies should not be necessary, for stubborn issues, this may help as a last-step effort.

After deleting your files, it is necessary to close <u>all</u> your internet browser windows and restart one new window; otherwise, clearing the cache will not take effect (for some browsers).

Finally, to return to SWABIZ[®], be sure to manually type <u>www.swabiz.com</u> into your browser's web address bar. Until the matter is resolved, do not use a link, a favorite, or even the "type-ahead" feature that some browsers use, as this may also be part of the problem. Manually entering the web address completely helps eliminate the possibility of loading a previously cached page.



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Button/Link Not Working or Missing

Error:

When you click a link or button, nothing happens. Or a button, link, or image is missing on the page, preventing you from taking a certain action or advancing forward in the booking process.

Solution:

This can sometimes occur if you are not using a current internet browser version.

SWABIZ[®] supports all mainstream browsers–Internet Explorer, Google Chrome, Safari, Firefox, etc. And of those browsers, only the current version and the immediate previous version are *supported*.

By "supported", we mean that our Web Development Team only tests against the current version of all mainstream browsers and their immediate previous versions. In other words, if bugs and glitches occur in older versions, they will not be found or fixed. Running an older operating system may also be a factor.

If you are using a work computer when encountering such errors, you may not have administrative rights to make system adjustments or even download the latest version of a browser. Or, if you're unsure how to delete temporary internet files or any other tasks previously mentioned, please contact your company's network administrator for assistance.



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Error Message: Payment Method

Sorry, we found some errors...

There was an issue with one or more of your payment methods. Please verify your payment information, including any cards saved in your Rapid Rewards® account and try again. If you continue to receive this message, try an alternate form of payment or contact a Southwest Airlines Customer Representative for assistance at 1-800-I-FLY-SWA (1-800-435-9792).

The above error message occurs for likely one of two reasons...

Scenario one:

If attempting to purchase the reservation with a stored credit card (Ghost Card or personal), perhaps the *stored* expiration date has expired. It's not that the CC expired, but rather the exp date stored in your SWABIZ[®] or Traveler Account needs to be updated.

MANAGE TRAVELERS PAYMENT REPORTING TRAVEL SETTINGS

Add | Assign | View/Modify | Reports

List Ghost Cards

Name	Credit Card Type	Credit Card Number	Expiration Date	Manage	Manage
Fake Corp Card	American Express	XXXXXXXXXXXXX1006	8 / 2019	Modify	Delete

Scenario two:

When SWABIZ attempts to purchase the reservation, it reaches out to the CC's issuing bank to get an approval code for the amount to be charged. If SWABIZ receives an approval code, the charge goes through and successfully completes the reservation. Or, the issuing bank could send a code back in place of the approval code, indicating refusal of payment, which SWABIZ in-turn shows the above error message. In such case, the card holder should call the issuing bank. The bank will be able to see Southwest[®] request for payment and the reason why they (the bank) refused payment.

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"Your company requires a SWABIZ® traveler login..."

If you're used to only having to enter your Company ID#, without having to enter an account number and password but are now seeing the above error message, then one of two things are happening, or both.

Either a full-access Travel Manager has checked this box under PAYMENT-Ghost Card Management...

Will all Travelers be required to use Ghost Cards only?

By checking this box, your company's Travelers will be required to create and use a Traveler Account and use an assigned Ghost Card in order to book air travel. Travel Managers will be required to use the same assigned Ghost Card(s) in order to proxy book (book on behalf) for those Travelers; however, Travel Managers will not be required or allowed to use a Ghost Card when booking travel for guests.

...and/or selected this Internal Reference Number option...

Will all Travelers be required to use Internal Reference Numbers (IRNs) in order to book travel?

- Yes. All travelers must select from Company-Defined IRNs. (Requires Traveler Account login.)
- O Yes. All travelers must select from Company-Defined IRNs or enter an alternative IRN.
- O No. Travelers are not required to enter IRNs.

Whatever the case, a full-access CTM needs to uncheck that Ghost Card box and/or choose a different IRN setting to resolve the issue. Or, if the change was intentional, Travelers will need to log in using their CID#, Rapid Rewards[®] number, and Rapid Rewards password.



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Can/should a Traveler have two Rapid Rewards® accounts-one for leisure and one for business?

For reasons listed below, we recommend the use of one account for both leisure and business travel purposes.

- Having two or more RR accounts can lead to various errors in the user experience
- Having one RR account maintains a single and total sum RR points balance, versus dividing the points balance
 among multiple accounts
- RR Members need not be concerned as Travel Managers cannot see/use a RR Member's points, nor can they
 see any flight information for reservations made without the SWABIZ[®] Company ID#, even though the same RR
 account was used to book the leisure reservation. As such, there's no need to have a separate "leisure" RR
 account.

What if someone doesn't have a Rapid Rewards account to associate with a SWABIZ account?

On the same page, under the **Traveler** tab, where a Traveler with a Rapid Rewards (RR) account signs in, is an **Enroll now** link that will allow one without a RR account to create one. When the Traveler enrolls into RR through SWABIZ versus **Southwest.com**[®], the new RR account is automatically associated with your company's SWABIZ account, thus making the new RR account a SWABIZ registered Traveler Account as well.



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Do travelers earn Rapid Rewards[®] points through SWABIZ[®]?

Yes. So long as the Traveler logs into their SWABIZ Traveler (Rapid Rewards) Account prior to booking, or manually enters their RR number into the reservation, the Traveler will earn RR points for SWABIZ reservations.

As a Travel Manager, can I upload a list of all my Travelers into my SWABIZ account?

Unfortunately, not at this time. While we understand uploading a list is a far more efficient process for large groups of Travelers, SWABIZ does not currently support that functionality. However, please be assured it is on our list of future enhancements. In the meantime, Travelers must create their own SWABIZ Traveler Account by clicking on the Traveler tab, and entering their company's SWABIZ Company ID#, and their own Rapid Rewards (RR) number and RR password. Doing so links their Rapid Rewards account to your company's SWABIZ account, thereby creating a registered SWABIZ Traveler Account which Travel Managers may then use to book using their account profile information and/or assign ghost card permission to.

Travel Manager name change/correction.

Unfortunately, there is not a way for a Travel Manager to correct or change their name. To do so requires the Travel Manager profile be deleted and recreated using the correct, updated name. For SWABIZ accounts with more than one full-access Travel Manager listed, another Travel Manager can create the new Traveler Manager profile with the correct/updated name. For SWABIZ accounts with only one full-access Travel Manager, create a new Travel Manager account for yourself first then delete the other Travel Manager account with the incorrect name second.



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Need help logging into your Travel Manager account?

Begin by clicking the **Need help logging in?** link on the SWABIZ[®] home page under the **Travel Manager** tab and providing the requested information.

If you are unable to provide the requested information to verify your Travel Manager account and need additional assistance, you may call the SWABIZ Help Desk (888-479-2249).

🔍 LOG IN CHECK IN **FLIGHT STATUS** CHANGE/CANCEL Already enrolled? Log in to start booking, view travel itineraries, and more. Traveler Travel Manager * Required **COMPANY ID NUMBER *** FIRST NAME* LAST NAME * PASSWORD * Need help logging in? Remember me Log in



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Need to add more Travel Managers to your account? You can add as many full and limited-access Travel Managers as needed. Here's how:

 Log in as a full-access Travel Manager Click TRAVEL SETTINGS Select Company Profile 	Southwest Business	FLIGHT HOTEL CAR	MANAGE TRAVELERS	PAYMENT REPO	DRTING TRAVEL SETTINGS
4) Click <u>Modify</u>	View Modify				
5) Scroll down to find and click <u>Add Travel Manager</u>	Company Travel Manager				
6) To grant full access to a Travel Manager, be sure to check this box.	* First * Last Suffix Select ✓ By selecting this box, you will grant this Corporate Traver reporting). Travel managers without Full Access will only be	el Manager with Full Access t able to book on behalf of trav	o SWABIZ (access to mana velers.	ge company travel po	licy, ghost cards, IRNs, and
Leave <u>un</u> checked for limited-access Travel Managers.	* Address Line 1 Address Line 2				
	* City * State Select Your Province * Zip Code	~			
7) A CTM 'create password' email will be automatically sent to the address you enter here.	* Phone				
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Why did my SWABIZ[®] account deactivate? How can I reactivate it?

Error: This company ID has been deactivated. Please contact your SWABIZ representative for more information.

If there has been no *transactional* activity (e.g. book, change, cancel, etc.) in the account for six months, the account will automatically deactivate. Simply logging in or running a report is not considered a transactional activity.

A deactivated SWABIZ account can be reactivated by calling the SWABIZ Help Desk (888-479-2249).

Once an account has been reactivated, some form of transactional activity must take place before the first of the next month; otherwise, the account will automatically deactivate again. Every time a transaction occurs, the "deactivation clock" is reset for another six months after the last transaction.

For Customers who also or exclusively use their SWABIZ Company ID# to book through the Southwest API/direct connect channel, please know transactions can still be made through the API using a deactivated SWABIZ CID#. The transactions will still be captured and reflect in SWABIZ reports. Of course, a SWABIZ account must be activate to *generate* reports.

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What is BOOKINGBUILDER?

***BOOKING**BUILDER (BB) is an application that allows a Travel Arranger who has already initiated a reservation in the GDS (Apollo, Amadeus, etc.) to shift the transaction over to an airline's website to continue shopping for more fares that are not shown in the GDS but are on the airline's website. For Southwest, clicking on the BB pop-up takes the User from the GDS to SWABIZ to complete the reservation.



Once confirmed in SWABIZ, BB writes the booked itinerary as a passive segment back in the GDS for tracking purposes. But please note, because the reservation was confirmed through SWABIZ, it is a SWABIZ PNR and not a GDS PNR.

For BB to be compatible and work successfully with SWABIZ, the transaction must follow the Guest booking path. Therefore, if a Travel Manager requires the use of a Traveler Account to book on SWABIZ, thereby disabling Guest bookings, whether through a Ghost Card or IRN setting, BB will not work. However, a Traveler's RR# can still be added to a BB reservation.

*BOOKINGBUILDER is a company that partners with but not owned or operated by Southwest.

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To ensure **BOOKING**BUILDER (BB) works properly with your SWABIZ[®] account, Traveler accounts must <u>not</u> be required to use. There are two settings a full-access Travel Manager controls to ensure Travel accounts are <u>not</u> required. Both settings are found and controlled under **PAYMENT**.

On the Ghost Card Management page, the box below must remain unchecked...

Will all Travelers be required to use Ghost Cards only?

By checking this box, your company's Travelers will be required to create and use a Traveler Account and use an assigned Ghost Card in order to book air travel. Travel Managers will be required to use the same assigned Ghost Card(s) in order to proxy book (book on behalf) for those Travelers; however, Travel Managers will not be required or allowed to use a Ghost Card when booking travel for guests.

On the Internal Reference Numbers page, the first or top "Yes" should not be selected...

Will all Travelers be required to use Internal Reference Numbers (IRNs) in order to book travel?

- O Yes. All travelers must select from Company-Defined IRNs. (Requires Traveler Account login.)
- O Yes. All travelers must select from Company-Defined IRNs or enter an alternative IRN.
- No. Travelers are not required to enter IRNs.

For assistance with your SWABIZ account, you may contact the Southwest® SWABIZ Help Desk at 888-479-2249

For technical support with your existing BOOKINGBUILDER account: support@bookingbuilder.com

For more general information about BOOKINGBUILDER: sales@bookingbuilder.com

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