Umbrella New UI User Guide – Atlas Travel

June 2024

Note:
Umbrella Faces Travel Profiles is fully PCI compliant. Your personal profile data is secure within this platform. In addition, Club Travel complies with all GDPR requirements as per the GDPR law that became effective MAY 2018.

Umbrella Faces
Travel Profiles

ATLAS
TRAVEL SERVICES

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Introduction

Welcome to Umbrella Faces Travel Profiles, the new profile storage system supported by Club Travel.
We will be using Umbrella as our new platform to store your traveller details, which our consultants can then use to book travel that caters to your requirements.

On the next few pages, we will outline the system basics and explain what we require from you and how we can most effectively cater to your travel needs.

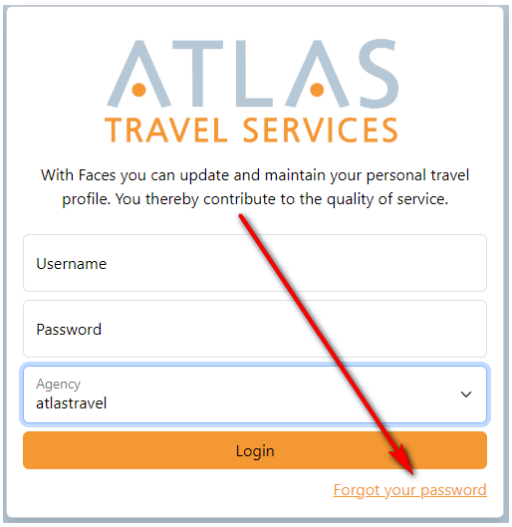
System URL

URL: https://tenzing.umbrella.ch/faces/atlas_travel/login

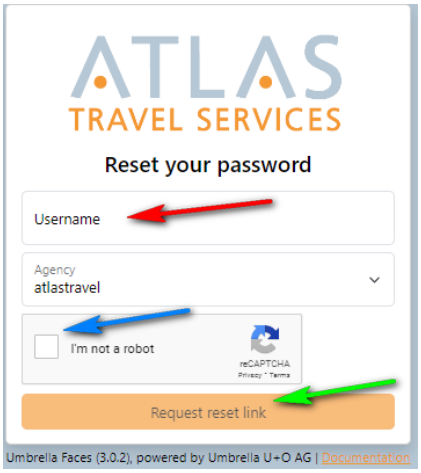
How to login and setup your User Profile

First log in

For your first time logging in to the system, you will need to choose the **'Forgot Password'** option from the login page after receiving your credentials from Club Travel.



Doing this will prompt you to enter your **username** (provided by us in the initial communications).
Also need to click on the **I'm not a robot** box and complete the security check. Then click on the **Request reset link button**.



An email will be generated from the system and will go directly to you. Please check your junk folder if you have not received this mail within 2 minutes.

In this email, there will be a link (which expires within 48 hours) where you can set your password for logging into the system.

Dear Mr. Murillo Vieira

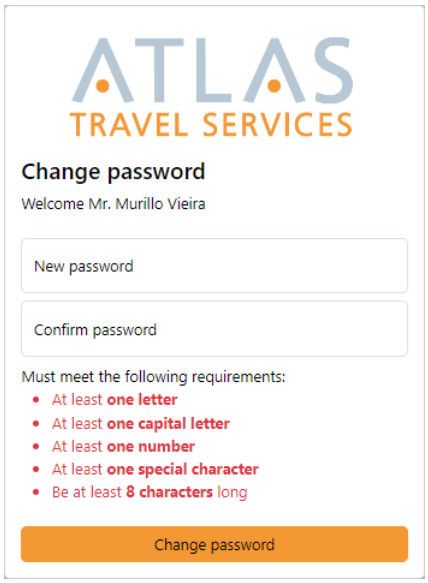
Welcome to Umbrella Faces, a traveller profile management tool provided by your travel agency Atlas Travel Services. Once you've logged in, you'll be able to easily correct and complete your traveller profile.

Your access credential are as follows:

- URL: https://tenzing.umbrella.ch/faces/atlas_travel/login
- Username: murillo@atest.ie
- Password: Set your password by clicking on this link. *Please note that this link will expire in 48 hours.*
- Agency key: atlastravel

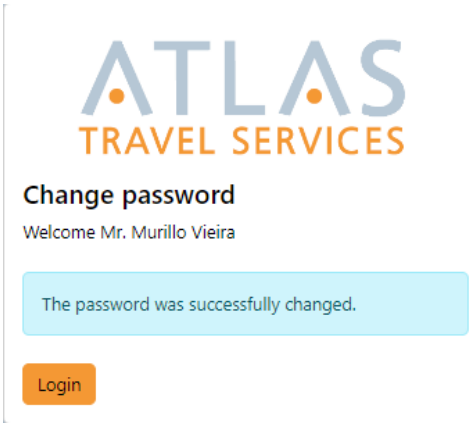
The Atlas Travel Services team

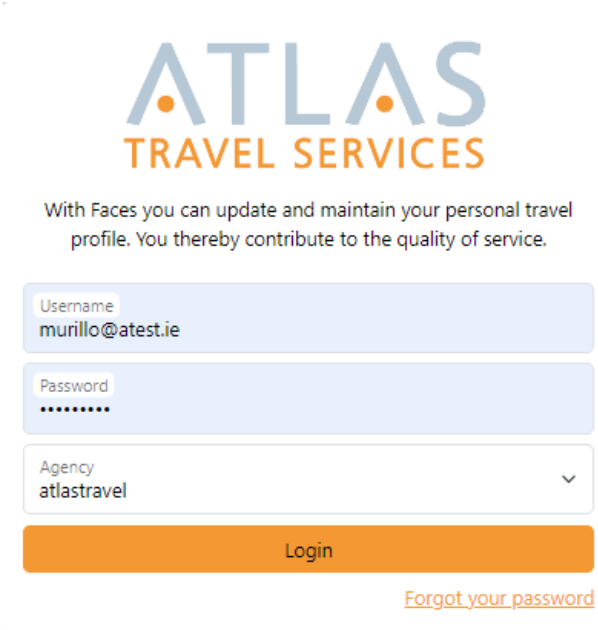
Once you click on the link you will be taken to the Umbrella Change Password Page where you can create a password of your choosing.
As a security measure, passwords for the system must follow the rules at the image below (in red).



Once you have set a password for yourself, you are ready to login and update your profile details.

Click **Login** and you will be redirected to the login window.



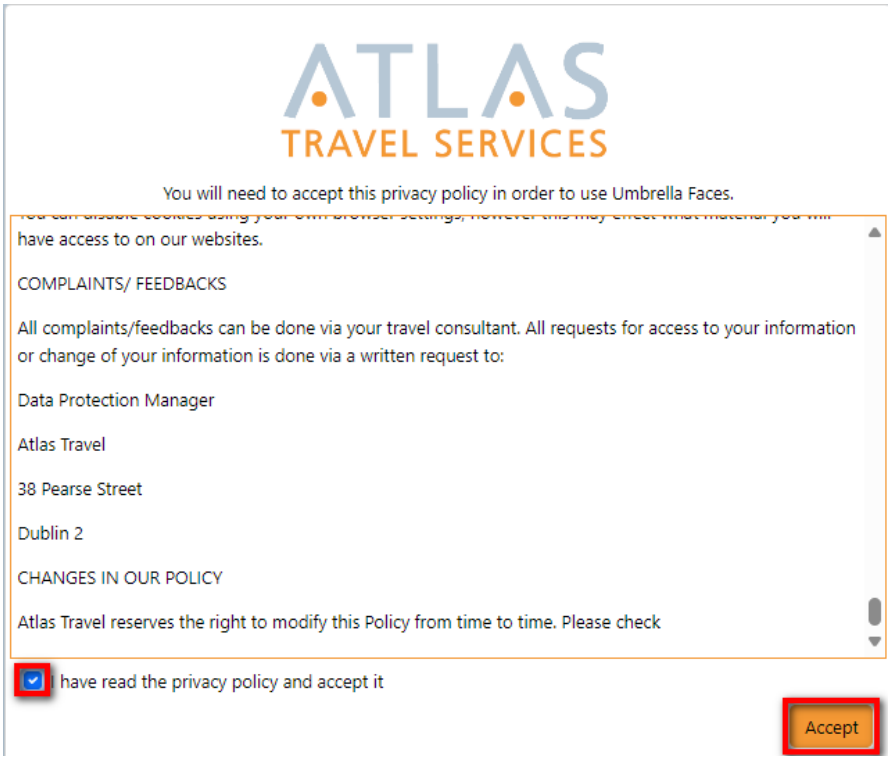


To log in, you must use the information provided to you in the email:

Username – must be entered exactly as provided to you in the email that you received.
Enter the password you have created.
Agency – Will always be prepopulated as atlastravel.

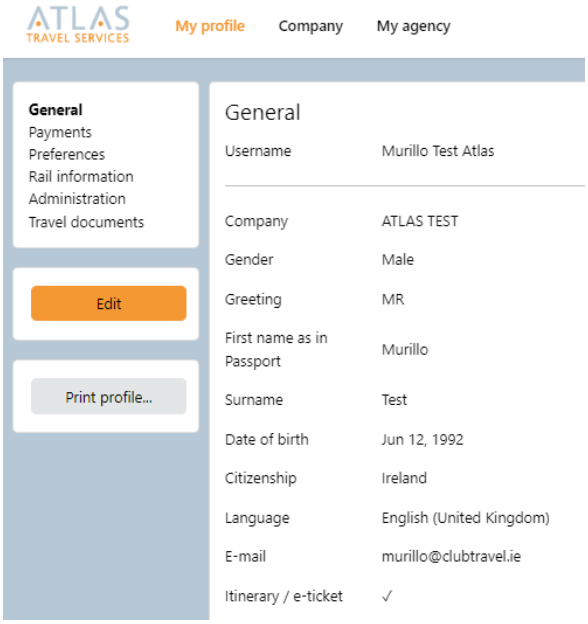
First Sign in

Upon your first login, you will be asked to read and accept a privacy policy statement. Once you have read and accepted this, you can continue through to update your traveler info.



Welcome Page

The home screen displays the 1st / **My profile** tab, which shows your profile information fields
The **Company** tab displays your company name and address
The **My agency** tab displays the Link for training page



My Profile

We have created basic profiles within this system for all users who we previously had data for, we took as much Profile Information from the old system as we could and migrated it into Umbrella. However, some information may not have been transferred during the process.

We ask that you review the following user profile guidelines and update your profile with any relevant information accordingly.

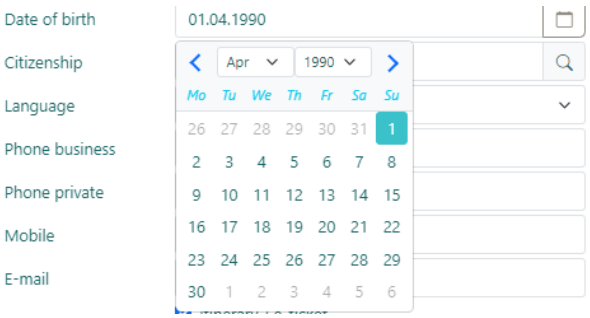
Note: Some information in your profile will be mandatory to fill in – this will be denoted with a BLUE box. A profile can only be saved once all these highlighted fields have been filled in.

General

This section is where we will gather the majority of your basic traveller info.

Your First name, Surname & email will always be mandatory information. Depending on your company's travel policy, there may be other mandatory fields, which will need to be entered before attempting to save.

Adding the Date of birth – You need to click in the box and select first "Month" "Year" followed by Date.

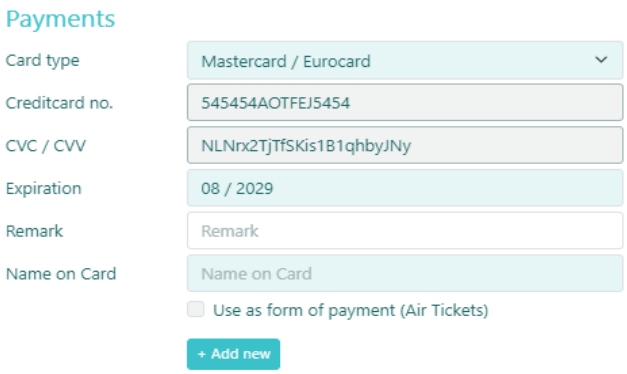


Payments / Credit Cards

Please note that if your company has been set up as a Cash account, you will not see this section

For storing your credit card details, you must enter a valid credit card number, Expiration, & CVV number in order to be able to save.

The system will then tokenize these numbers (scramble them into a random series of characters) in order to keep the data safe.



Our consultants will then be able to securely access this information to use these details for your bookings without having to contact you by telephone and getting your number that way.

Priority Notes

Here you will be able to define any additional info that you might want your consultant to know when they are making bookings for you.

This could include things like preferred seat numbers for flights, hotel preferences such as where your room should be situated, or any other notes that you think our consultants might be able to cater to.

Please note – these requests cannot be guaranteed, but our consultants will try to book in accordance with them as best they can.

Preferences

In this section you can specify any meal types which you would prefer, as well as whether you would like a window or aisle seat. If you wish to be more specific about any of this info, you can use the priority notes section for this.

You can also enter any Frequent Flyer Numbers/Frequent Traveller Numbers that you might have for airlines/hotel chains. You consultant can then use this information when they are making bookings for you.

Administration

In this section, you will be given the option to enter any emergency contact details that we can have stored in case of an emergency that might happen while you are away on a trip. This will allow us to contact the specified contact to inform them of the issue.

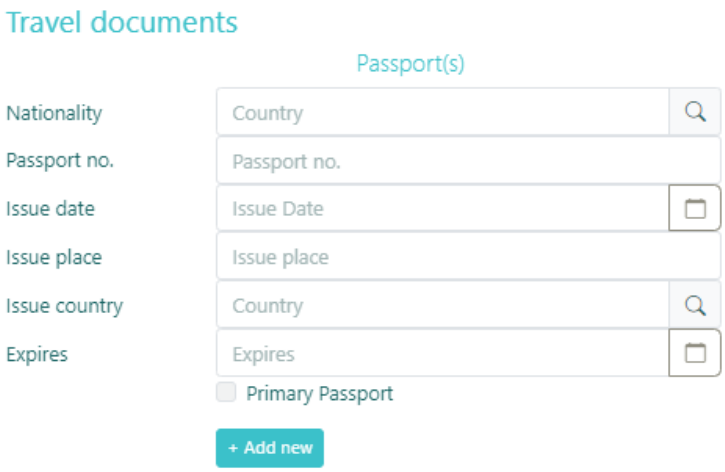
Depending on your company's policy, you may also have the option here to enter in an arranger/approver for your travel. This will allow our travel consultants to know who is also supposed to be copied into itineraries of your travel.

Rail Information

Here you will have the option to provide any preferences you might have should you book any rail travel with us. You can also enter any Frequent Traveller Numbers that you might have for rail.

Travel Documents

Here you can enter in the information for any Passports or Visas that you may need our consultants to know. Depending on your company's travel policy, passport information may be a mandatory field. This will be identifiable by a BLUE highlighted box.



Additional Fields & References

You may have other fields that are not mentioned in the above.

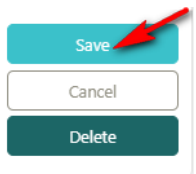
These are most likely going to be specific for your company and will require information that is tailored to you.

These will sometimes be mandatory, and sometimes require specific inputs in order to be able to save them. Our consultants will use this information during bookings as agreed upon with your company.

Finalizing profile

Once you are happy that all your information has been updated and all of your preferences have been listed, you can save the profile.

The option for this can be found down on the left menu. This will be then sent to Club Travel's systems and our consultants will be able to cater to your travel needs.



Profile Managers

Your company may have nominated individuals who are going to manage the traveller profiles.

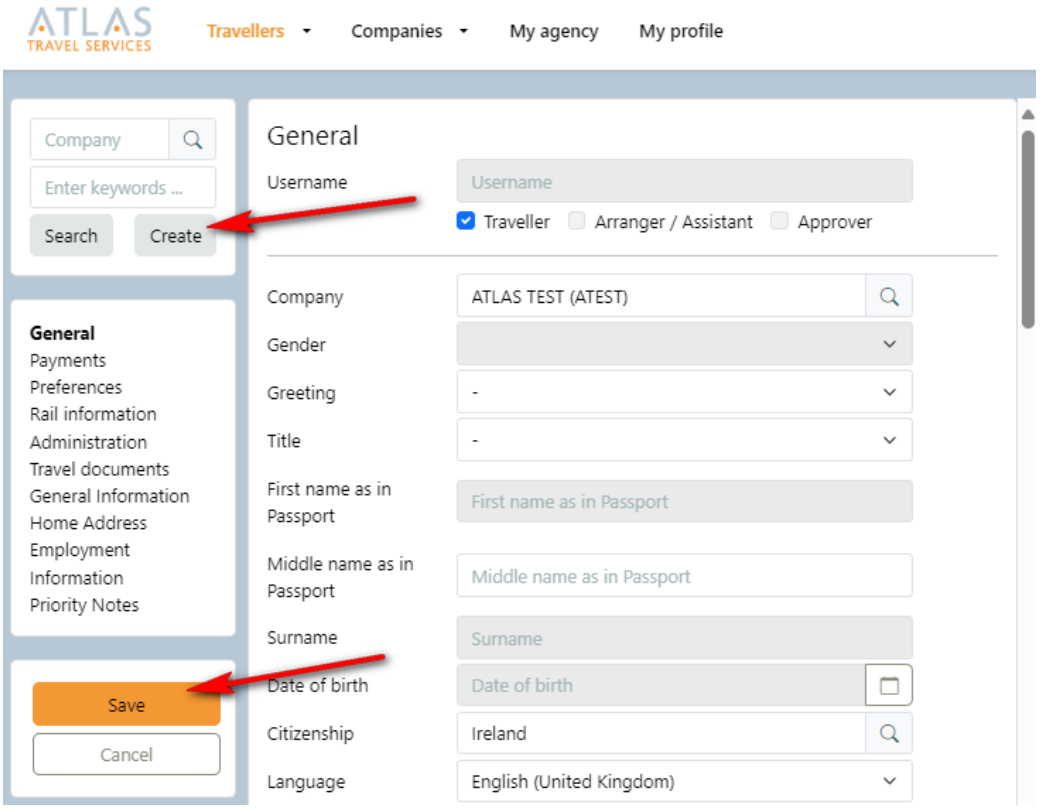
For information on how to edit other users, when you have been nominated as a profile manager, please see the below information.

If you are supposed to be managing traveller profiles, but do not have access to do any of the below, please contact your consultant and they will be able to assign the rights for you.

Creating a new traveller

If you wish to set up a new traveller on the system, you will need to ensure that you are on the Travellers tab of the system, once you click Travellers for the first time you will be given the fields to start creating new user, enter the information and click save.

If you have a profile in the system and it is showing your traveller profile in the screen, please click on the CREATE button and it will bring up a blank traveller screen. After adding all the mandate information you can click on the SAVE button.

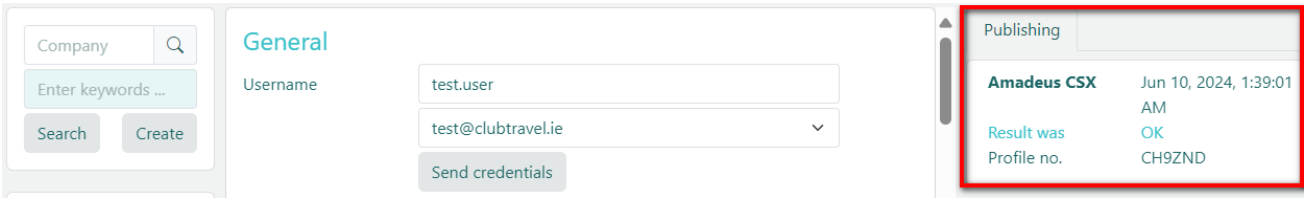


NB – Please use the traveller's email address as their username when creating a new profile

Publishing

This section does not require any action from you and simply gives notification that the information that you have entered on this page has been sent to Club Travel's internal systems.
If, after you save your profile, you receive any errors or failure messages here, we ask that you attempt to save again. If you continue to have issues, we would ask that you log out (upper right corner) and log back in and attempt to save your info once more.

If the issue persists any more than this, we ask that you log the issue with your travel consultant or on the support link and they will be able to administrate the issue from there.



Sending Login Details

If you wish to send login credentials to a user to get them signed into their profile, you can send a welcome email directly from the system, which will include all information necessary to get the traveller signed in.

Go to Travellers TAB, at the ENTER KEYWOEDS field search for the traveller you wish by typing first name or any part of the name. If you want to see all travellers, you can click on the SEARCH Button and it will display all traveller in your company.

You need to click on the name of the traveller you are looking for and it will display traveller profile. From the very first section of the user's profile, you have the button 'Send Credentials'. Clicking on this button, system will automatically send a Credentials email with login details to the selected traveller.

Editing an already existing profile

To update the profile of a traveller who is already listed on the system, you follow the same first steps as creating a new profile. Search and select the traveller you are looking for.

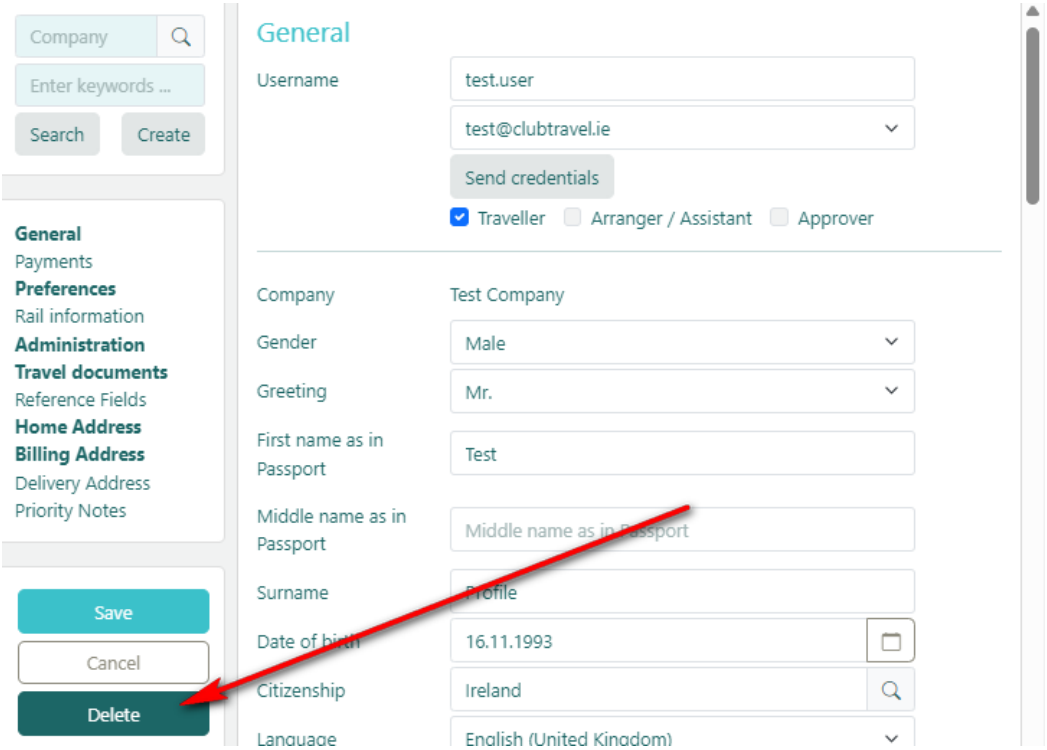
If there are multiple users who meet your search criteria, you will be shown a drop-down list with all of them. You simply must select the correct traveller from this list to begin updating their profile.

You can then update this traveller's profile details with any new information and save as normal.

Deleting a profile

To delete the profile of a traveller who is already in the system follow the first few steps to search a profile. . Search and select the traveller you are looking for.

Once you have opened a profile go to the bottom of the left bar menu and select Delete.



Email Reminders:

Umbrella sends reminder emails from time to time regarding expiration dates for Passports and credit card.

You will receive these reminder emails 1 month in advance of a Credit Card expiry & 8 months in advance of a passport expiry.

The email will come from profiles@atlas.ie and subject will be *Umbrella Faces: Reminders*

Please see below as an example case of how this email will look for you.

Sent: quinta-feira, 1 de fevereiro de 2024 04:12
To: [redacted]
Subject: Umbrella Faces: Reminders

Dear Mr. [redacted]

Your profile held by Club Travel in Umbrella Faces, last updated on 17 Jan 2023, contains the following outdated information:

- Creditcard, expires 03/2024

We kindly ask you to update your information.

Your access credential are as follows:

- URL: https://tenzing.umbrella.ch/faces/club_travel
- Username: [redacted]
- Agency key: Club Travel

The Club Travel Team

Issue/Bug Reporting

As with any online tool, you may encounter some bumps along the way.

If you encounter any difficulties, issues or bugs using the system, please use the support form on our support site: https://www.clubatlastraining.com/umbrella

The link for this can be found under My Agency TAB at the top.