

Using Live Connect

Live Connect makes it possible to share information between a Res Card and the supplier's booking engine. A Res Card must exist in *ClientBase Online* and you must have access to the supplier's booking engine. Live Connect (LC) has the ability to help with six different functions when interacting with our Live Connect Providers. Please refer to your cheat sheet at the end of this document on which features each Live Connect Provider uses. These features are:

	Populates booking engine with user login data	Allows agents to store their web site credentials in CBW. When launching LC, CBW will automatically log the user into the booking engine.
New Reservations	Populates booking engine with profile data	When creating new reservations using LC, client profile data will be automatically inserted into the booking screen. This cuts down on redundant data entry and helps ensure that the reservation details are accurate.
	Sends reservation details from booking engine's confirmation page to CBW reservation	When creating a new reservation using LC, the reservation details can be automatically imported to a Res Card reservation from the booking engine's confirmation page.
Existing Reservations	Uses confirmation number to automatically retrieve reservation in booking engine	When importing an existing reservation, and agent simply enters the confirmation number and CBW retrieves the reservation automatically.
	Browse for reservation to retrieve in booking engine and import into CBW	Allows and agent to use the booking engine to browse or search for the reservation and then automatically import it.
	Retrieves previously imported LC reservation for viewing and editing reservation and updates Res Card	For reservations previously imported into a Res Card, allows agents to easily retrieve the reservation in the booking engine, make changes, and import the changes to update the Res Card.

To Enter Your Password for Automatic Login

For the LC providers that allow automatic login, agents may save their login credentials in CBW. To add or change your credentials, click **Tools > My Login**, then click on the **Live Connect** tab. Click **Add** and choose the Live Connect Provider from the drop-down list. Since different providers require different login details, see the *ClientBase Online* Help files > An In-Depth Look at Live Connect for details. If you are unable to access the **Tools** menu, the System Administrator will have to either modify your permissions, or set this up for you.

Important Note: *Only enter information on these screens for those providers that allow automatic login. Entering this information for other sites may have unintended results during the Live Connect process.*

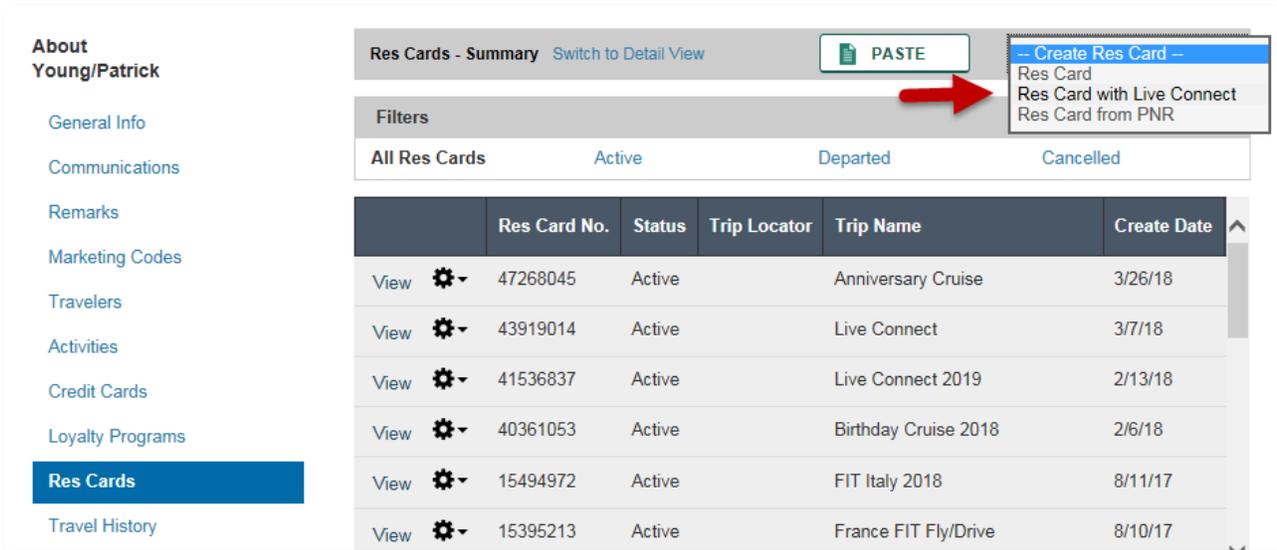
- Input your username and login in ClientBase under **Utilities > My Login**. Click on the *Live Connect* tab and *Add*. Select LC Provider from the dropdown menu (example is Globus). Fill in your username and password and click *OK* to save.

- Logins can also be set up globally for all users under **Tools > Settings > Live Connect Logins**. This is uncommon as agent's usually have their own login for each site. Classic Vacations is a well-known exception.

Connecting from Reservation vs. Res Card screens and Vendor Setup:

There are two screens from which you can initiate a Live Connect session, either from the Res Card screen in the lower right, or near the top of a newly created reservation:

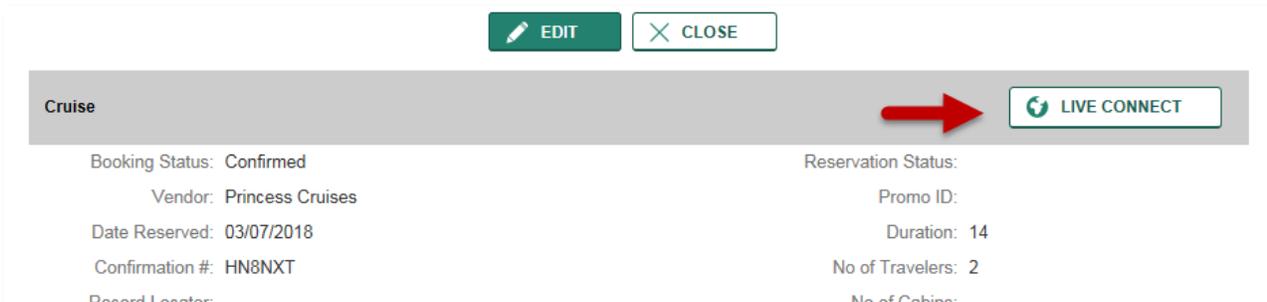
Res Card:



The screenshot shows the 'Res Cards - Summary' view for 'Young/Patrick'. A 'PASTE' button is highlighted with a red arrow, pointing to a dropdown menu with the following options: '-- Create Res Card --', 'Res Card', 'Res Card with Live Connect', and 'Res Card from PNR'. Below the filters, a table lists several reservation cards.

	Res Card No.	Status	Trip Locator	Trip Name	Create Date
View ⚙	47268045	Active		Anniversary Cruise	3/26/18
View ⚙	43919014	Active		Live Connect	3/7/18
View ⚙	41536837	Active		Live Connect 2019	2/13/18
View ⚙	40361053	Active		Birthday Cruise 2018	2/6/18
View ⚙	15494972	Active		FIT Italy 2018	8/11/17
View ⚙	15395213	Active		France FIT Fly/Drive	8/10/17

Reservation:



The screenshot shows the 'Cruise' reservation details. At the top, there are 'EDIT' and 'CLOSE' buttons. Below the details, a 'LIVE CONNECT' button is highlighted with a red arrow. The reservation details include: Booking Status: Confirmed, Vendor: Princess Cruises, Date Reserved: 03/07/2018, Confirmation #: HN8NXT, Record Locator: (partially visible), Reservation Status: (partially visible), Promo ID: (partially visible), Duration: 14, No of Travelers: 2, and No of Cabins: (partially visible).

There are a few subtle differences between these two methods.

Connecting from the Res Card Screen:

- Vendor setup is optional (except with VAX which requires connection from the Reservation screen).
- You may have to select the correct Vendor for the created reservation to be linked to when importing.
- You are able to launch up to 5 additional Live Connect sites simultaneously.

Connecting from the Reservation Screen:

- Vendor must be linked to the appropriate Live Connect Provider. This is done inside the Vendor Profile.
- If a Provider offers multiple vendors to book with, the setup done in the Vendor Profile will also include a Vendor Code. See our website or help documentation for lists of these codes. Examples of these types of providers would be Sabre Cruises, VAX, and World Agent Direct.

For assistance in checking your vendor profiles or assistance in linking providers to profiles, see the *ClientBase Online Help* files for details.

Steps for successfully using Live Connect

- Open the *ClientBase Online* Help files (Help > Contents).
- Select the chapter “An In-Depth Look at Live Connect”.
- Scroll through the list of Providers and become familiar with the Providers you will be using by reading each sub-chapter.

Using Live Connect to Book a Reservation

1. Prepare the profile and the res card first.
2. Depending on the Live Connect provider, agents can either create new reservations from within *ClientBase Online* or they can import reservations that were booked outside of *ClientBase Online*. If using Live Connect to book a new reservation, it is highly recommended that agents choose an existing traveler from the traveler list. If someone is traveling who is not usually part of the profile, they can be added for this one trip only by clicking *Add*, then *Add to Res Card*. If you wish to add them and keep them linked to the profile, choose *Add to Res Card and Profile*.

Travelers					
	Name	Last Name	First Name	Middle Name	
<input checked="" type="checkbox"/>	Able Jr/Kenneth Alan	Able Jr	Kenneth	Alan	
<input checked="" type="checkbox"/>	Jones/Susan Weeble	Jones	Susan	Weeble	Adult N
<input type="checkbox"/>	Able/Jon William	Able	Jon	William	Adult N
<input type="checkbox"/>	Able/Abigail Ann	Able	Abigail	Ann	Adult N

3. Almost all Live Connect providers allow agents to book new reservations and easily import them into the Res Card. If you already know which vendor you will be booking, we recommend clicking on **Add Reservation**, entering the vendor, and clicking on the Live Connect button (this may happen automatically). In our example, we are using Princess Cruises.

Cruise		
Date Reserved	Booking Status	Promo ID
3/27/18	Confirmed	
Vendor	Confirmation Number	Record Locator
Princess Cruises		
Booking Method	[--Booking Method--]	

Message from webpage

 This Vendor is configured for Live Connect. Would you like to launch Live Connect rather than manually enter the Reservation data?

4. On the next screen, choose ‘Create New Reservation’.

Check All:

Profile Entries

Email
 kenandsue@sample.com

Address
 4563 Maple Tree Ave Sterling Heights MI 48312 US

Traveler Entries

Able Jr/Kenneth Alan

Age 57 (08/29/1960)

Citizenship
 US

Passport
 857496222 01/01/2005 12/31/2017 US

Phone
 Cell +1 (419) 555-3152

Email
 ken@example.com

Live Connect Settings

Vendor (Optional)

Connect To

User Name

Password

Account No.

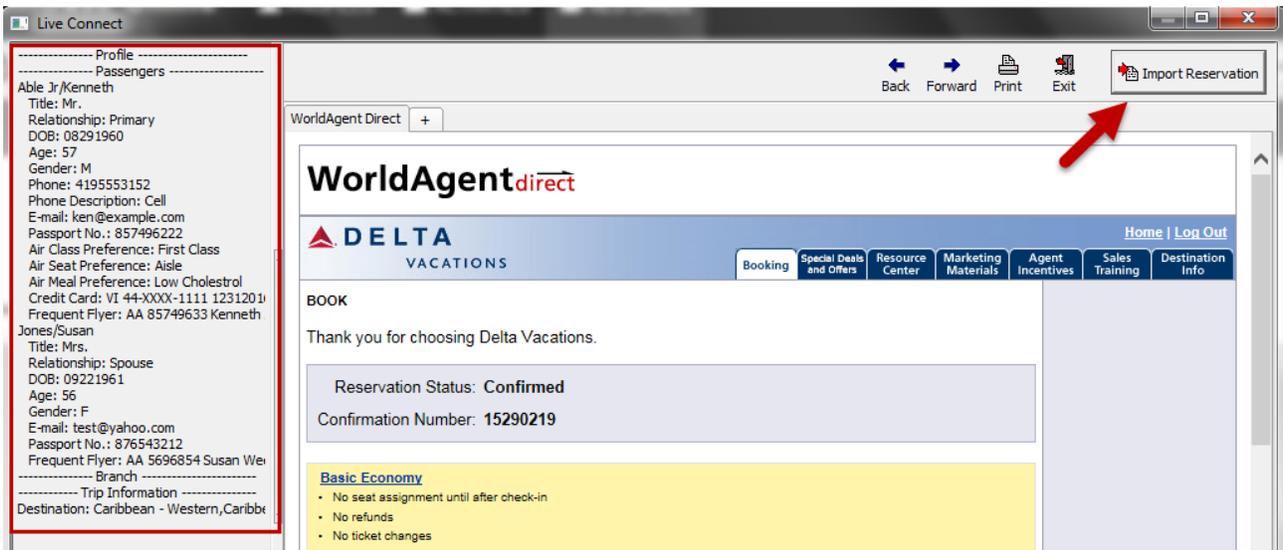
Branch

Agent

Confirmation No.

5. On the next screen, choose the information you would like to make available to the provider's web site. The checked items will be sent to the booking engine. You may want to choose the **Select All** check box. Once you have decided which information to include, click on the **Connect** button.

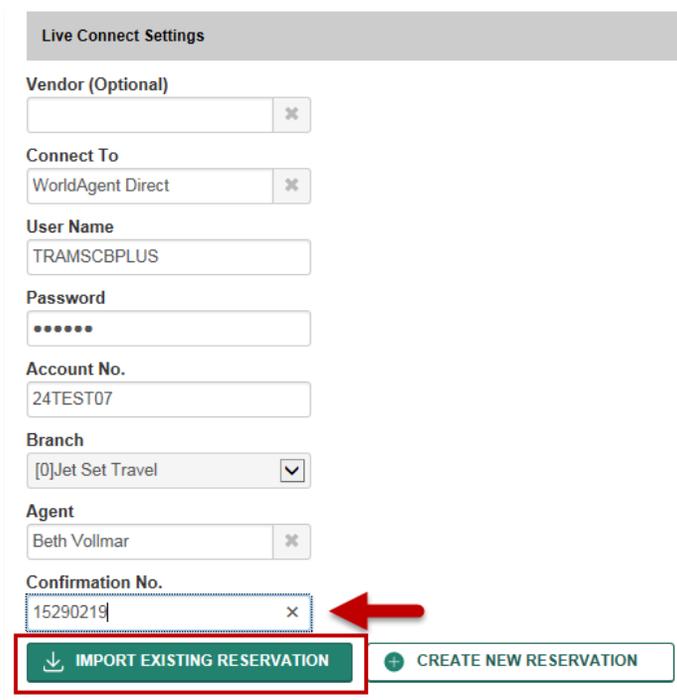
6. The next window is the Live Connect window. It functions much like any other Internet browser but includes two important items: There is a box on the left-hand side of the screen that summarizes all of the information that is available to move from ClientBase. On the upper, right-hand side, you will notice a button labeled **Import Reservation**. Once you are done booking the reservation, select *Import Reservation*.



Importing Existing Reservations

Many Live Connect providers allow for the capability to import existing reservations, either made online but outside of *ClientBase Online*, or even made over the telephone. There are two ways to import an existing reservation - entering the confirmation number on the initial Live Connect launch screen, or after launching Live Connect, retrieving the reservation through the Live Connect Provider's website.

1. Begin by launching Live Connect as above. Click on the **Import existing reservation** button. If you know the confirmation number, enter it in the next window. Otherwise, simply click OK to continue to the provider's website.



Live Connect Settings

Vendor (Optional)

Connect To: WorldAgent Direct

User Name: TRAMSCBPLUS

Password: ●●●●●●

Account No.: 24TEST07

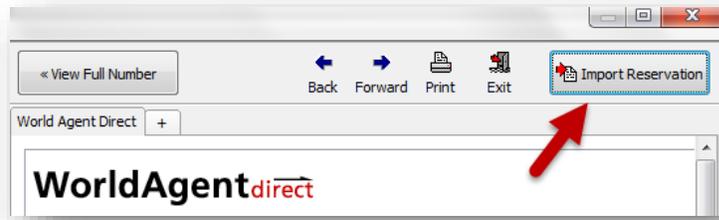
Branch: [0]Jet Set Travel

Agent: Beth Vollmar

Confirmation No.: 15290219

IMPORT EXISTING RESERVATION | CREATE NEW RESERVATION

2. If a valid confirmation number is entered and the feature is available, you will be immediately shown the confirmation page. If the confirmation page does not appear, search for the reservation as you typically would on the provider's website. Once you are at the confirmation page, click on the **Import Reservation** button to import the details into ClientBase.



Having Trouble with a Live Connect Vendor? Know where to get Help!

For reference: Go to <https://www.trestronologies.com/trams-and-clientbase/live-connect-documentation/>. This page will give you a list of Live Connect Providers that have an outstanding issue of some kind, i.e. an outage, a setup change (like a new URL) to make in ClientBase, or a problem importing certain types of reservations. This page also will have entries for any recently added Providers.