Live Connect

One of the most innovative features in ClientBase is Live Connect. Save time and improve efficiency by moving selected client information to a booking engine online. Then you can import back the reservation details and automatically complete the Res Card with what has been booked. You can print out client quotes, itineraries, and generate invoices and trip statements. Since ClientBase shares a database with Trams Back Office, the invoices generated from the Res Card automatically become part of the invoices shared with Trams Back Office. We are continuing to add more on-line booking engines to our list of Live Connect Partners.

Because each Live Connect Provider may require unique setup and usage, the following is general information for the Live Connect setup. **Please see our Knowledgebase articles for specific directions for each Live Connect Provider.**

There are three parts for the setup of every Live Connect Provider: Step 1: the URL, Step 2: the Login, and Step 3: the Vendor setup. Some providers do not want Step 2 done as they prefer, for security reasons, that login information is not saved in ClientBase, and you must log in at the site after connecting.

Step 1) URL

Verifying the URL

Click on Utilities/Live Connect Providers, and find the Provider you want to use, or add if it is new. Check to ensure that the URL that you see is the URL in the current Knowledgebase article.

Step 2) Login setup

When you connect to the Live Connect Site, you must login, just as you do when you access the site outside of ClientBase. If the Live Connect Provider requires your login be saved, then see below:

The setup for Live Connect agent logins can be done in two ways: 1. If all agents share the same username, password, and account number, you will set up the global login in the Global Defaults Menu or 2. if each user has their own login, you will set it up in each User's login settings. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then the system looks for the login information at the Global Defaults level.

To setup globally: click on Global Defaults/Res Card Defaults/Live Connect Login. Click Add. Choose the Live Connect Provider from the drop-down list and add the applicable fields.

To setup individual user information: Login as SYSDBA. Then click on Utilities/User Logins/User List. Now double-click on a User, and click on the Live Connect tab. Then click on Add. Choose the Live Connect Provider from the drop-down list and add the applicable

fields. If users have access to the Utilities menu, they can click on Utilities/My Login and set up their own logins by going to Utilities/My Login/Live Connect and clicking Add.

Step 3) Vendor setup.

All Live Connect Providers require a vendor setup. The vendor codes can be found in the Knowledgebase articles for each provider.

For each vendor offered by the Provider, retrieve the vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the Live Connect Providers button at the bottom right. Click Add and choose the applicable Live Connect Provider from the dropdown. Enter the vendor code. Click OK, then Close, then Apply.

Live Connect Features:

You will see the chart below in articles for each Live Connect provider. This sample chart shows all features checked, but not every provider offers all. Some providers do not allow importing reservations or retrieving reservations but only creating new reservations. Other providers offer importing existing reservations as the only feature. Please check the Knowledgebase article for each provider to see what is checked for that provider.

Create a new reservation using Live Connect:

Step 1) Create a Res Card and fill in the Agent, Branch, Reservation Cycle, and Trip Name fields and select the passengers.

Step 2) Use the Add Reservation button to start a new reservation. Choose your vendor, and then click Live Connect. The Live Connect screen may load automatically if that setting was chosen in Global defaults. If it does not, click the Live Connect button. Click Create new reservation.

Step 3) Select any customer information to use to book the reservation. Click Connect.

Step 4) Although you are still in ClientBase, you are now on-line at the Live Connect Provider Bookings site within the CB frame. Complete the reservation as you would if you were logged in to the booking engine outside of ClientBase. When the reservation is confirmed, click the Import Reservation button at the top right. All reservation data booked on-line is now located in the reservation fields in ClientBase. Now click OK at the bottom, then Apply. After this, you can make any edits you wish to the reservation.

Import Existing Reservations Made Outside of ClientBase

Step 1) Create a Res Card and fill in the Agent, Branch, Reservation Cycle, and Trip Name fields and select the passengers.

Step 2) Use the Add Reservation button to start a new reservation. Choose your vendor, and then click Live Connect. The Live Connect screen may load automatically if that setting was chosen in Global defaults. If it does not, click the Live Connect button. Click Import Existing Reservation. Enter the confirmation number if known, or if the browse for reservation feature was checked in the grid, leave blank. Then click OK.

Step 3) If a confirmation number is entered, the system automatically retrieves the reservation. If left blank, after connecting to the site, browse for the reservation. Once the reservation details are showing, click the Import Reservation button at the top right. All reservation data booked on-line is now located in the reservation fields in ClientBase. Now click OK at the bottom, then Apply. After this, you can make any edits you wish to the reservation.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Modify the Reservation. Click the Live Connect button.

Step 2) Now click Retrieve Reservation. Then click Connect.

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation as if you were in the site outside of ClientBase and click Import Reservation. All reservation data edited or cancelled on-line is now located in the reservation fields in ClientBase.