

American Express Vacations

You need to be an American Express agency to use American Express Vacations Live Connect.

Set Up American Express Vacations

Step 1) American Express Vacations uses the Travel Impressions Live Connect Provider. Create a new or check that a Live Connect Provider for Travel Impressions exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

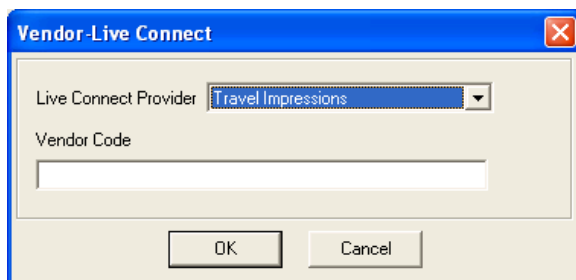
Provider Name: Enter Travel Impressions.

URL: <https://quest.travimp.com/phase1/agents.html>

Travel Category: Select Tour from the drop-down.

Import XML from: Select *HTML Source*.

Step 2) User Login Data does not populate in Live Connect so no set up is required, but create a vendor profile in ClientBase if one does not exist. From the profile manager, retrieve the *American Express Vacations* vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select Travel Impressions from the drop-down list. The vendor code is left blank. Click *OK*.



The image shows a dialog box titled "Vendor-Live Connect". It has a blue title bar with a close button (X) on the right. The main area contains a "Live Connect Provider" dropdown menu with "Travel Impressions" selected. Below it is a "Vendor Code" text box which is currently empty. At the bottom of the dialog are two buttons: "OK" and "Cancel".

From the vendor General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Travel Impressions (from the drop-down list). The vendor code is blank. Click *OK*.

American Express Vacations Features

American Express Vacations supports the following Live Connect features if checked off by ✓:

<p>✓ CREATE NEW RESERVATION (Launch, Book & Import New Reservation)</p> <ul style="list-style-type: none">___ Populates booking engine with User Login data from ClientBase.___ Populates booking engine with profile data from ClientBase.✓ Sends reservation details from booking engine's confirmation page to ClientBase reservation record. <p>✓ IMPORT EXISTING RESERVATION (Imports new reservation booked outside of ClientBase)</p> <ul style="list-style-type: none">✓ Uses confirmation number to automatically pass all reservation details from booking engine to ClientBase reservation record.✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to ClientBase reservation record. <p>✓ RETRIEVE RESERVATION - Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.</p>

Create New American Express Vacations Reservation

Step 1) Create a Res Card in ClientBase, enter the *Res Card Cycle* and *Trip Name*, and add a reservation. Enter the Travel Category and select *American Express Vacations* as the vendor and then click *Live Connect*.

The screenshot shows the ClientBase Plus interface for creating a reservation. The 'Reservation' tab is active, showing fields for Date Reserved (10/12/2008), Booking Status (Confirmed), Vendor (Travel Impressions), and Travel Category (Tour). A 'Live Connect' button is highlighted. Below, a table shows passenger details for Anderson/Edward and Anderson/Liz, with a total fare of \$10.00. The 'Service Provider' section shows 'Travel Impressions' selected.

Passengers	Base	Tax	Commission	Total Fare
Anderson/Edward	0.00	0.00	10.00 %	0.00
Anderson/Liz				

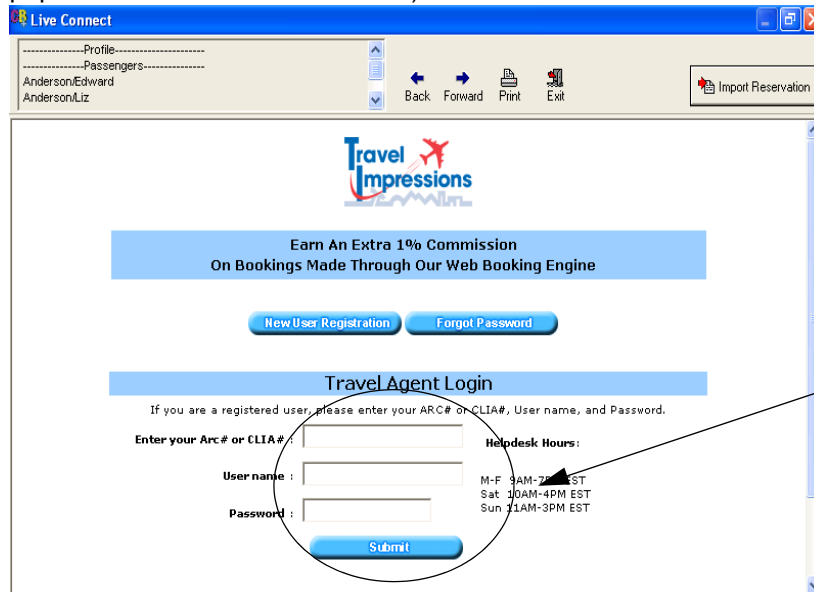
Reservation Totals		
Fare	\$	0.00
Base	\$	0.00
Tax	\$	0.00

Step 2) Select American Express Vacations from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the American Express Vacations reservation. This data is **NOT** passed to American Express Vacations, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.

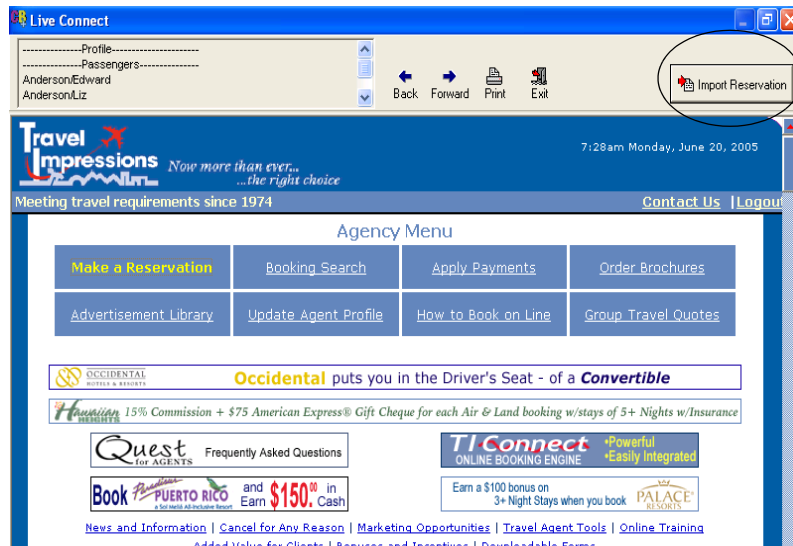
Step 4) Although still in ClientBase, you are now on-line at the booking site. A page appears which verifies your ARC or CLIA #, User Name, login, and password the first time you sign in (and is pre-

populated with this data thereafter).



Enter your ARC or CLIA #, your user name and password, and click *Submit* to continue.

Create the booking by clicking *Make a Reservation* with all passenger information (none is passed to site through ClientBase, but you can highlight, copy and paste information at top of screen into booking fields) and when the reservation is confirmed, click *Import Reservation* at the top of the ClientBase screen. All reservation data booked on-line is now located in the reservation.



Import Existing Reservation Made Outside of ClientBase

First, create a new reservation and click *Import Existing Reservation*. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in American Express Vacations website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into ClientBase.

Retrieve an Existing Reservation for Editing or Cancelling

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

Step 1) Launch Live Connect from inside the reservation to edit or cancel in ClientBase.

Step 2) A dialog box appears. Click *Retrieve Reservation*.

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation*. All reservation data edited or cancelled online is now located in the reservation fields in ClientBase.