Although Umapped is not a typical Live Connect Provider, you may use the Live Connect connection process to import reservations details added on their site. ClientBase Res Card reservations that have already sync'd with the Umapped platform can not be re-imported to ClientBase.
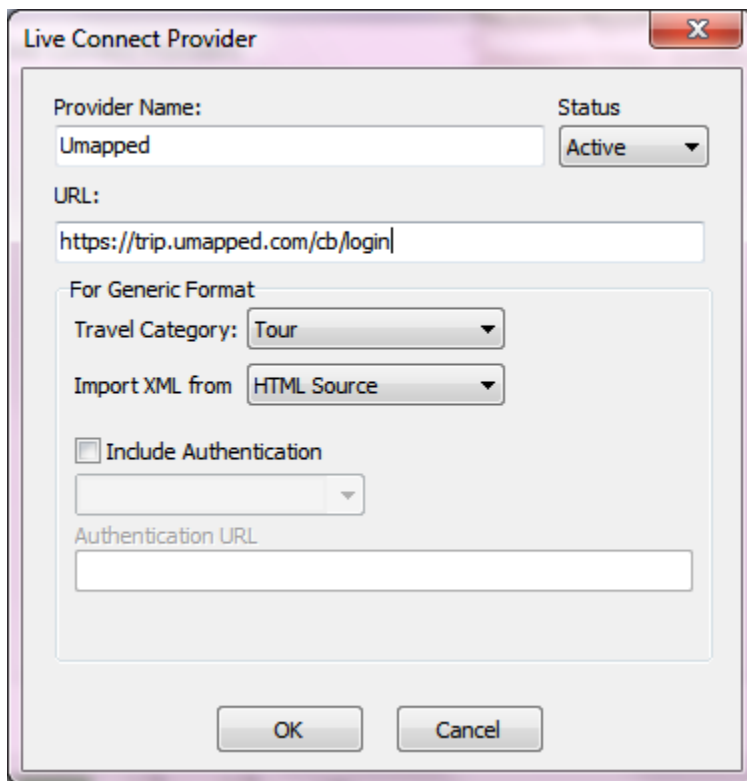
To register with Umapped, visit their sign-up URL: http://umapped.com/trial/

For assistance, you may contact them at support@umapped.com

Set Up Umapped

Upon receiving login information, take the following steps to setup ClientBase for Live Connect with Umapped.

Step 1) Create a Live Connect Provider for Umapped by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Enter Umapped

URL: Enter **https://trip.umapped.com/cb/login**

Travel Category: Enter Tour from the drop-down menu

Import XML from: Enter HTML Source

Step 2) Set up for Live Connect agent logins can be done individually. 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 asks the user to login at the provider website. Users can store their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add*.

Live Connect Provider: Select Umapped from the drop-down list.

User Name, Password, Account Number: Enter your User Name and your Password

Live Connect Features Supported by Umapped

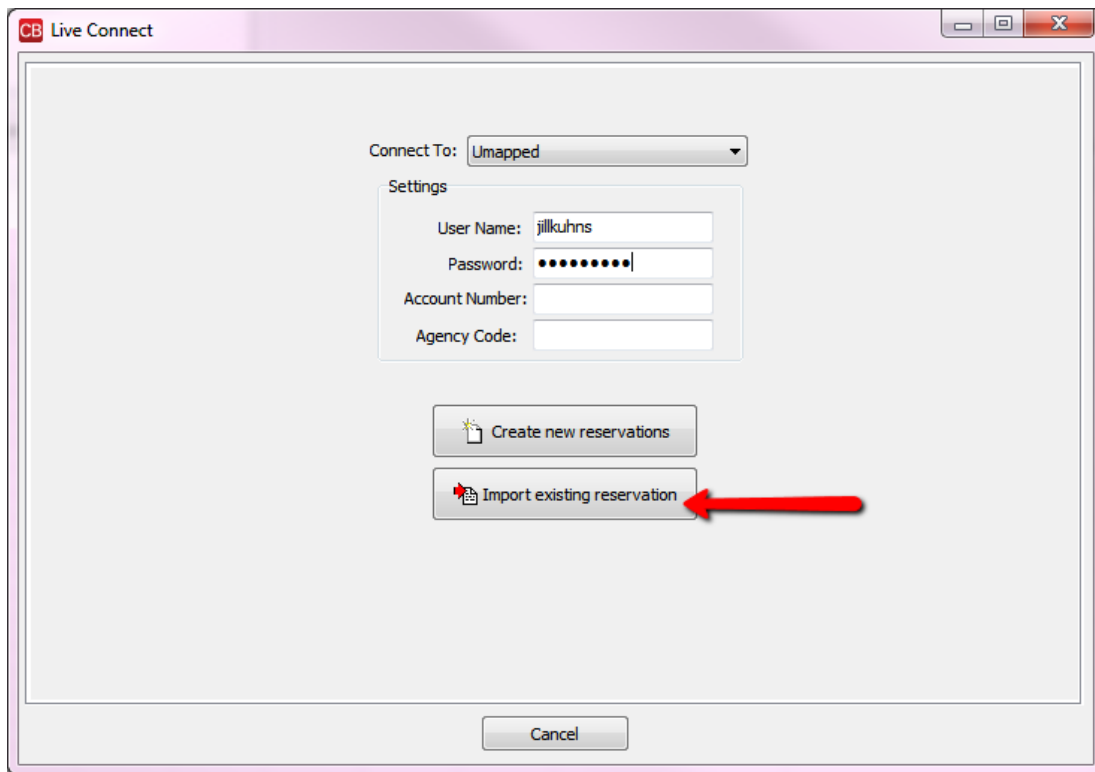Umapped supports the following Live Connect features if checked:

_ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

  _ Automatically logs you into 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.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

  ✓ Automatically logs you into booking engine with User Login data from *ClientBase*.

  _ 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*.

✓ **RETRIEVE RESERVATION** – Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservation details.

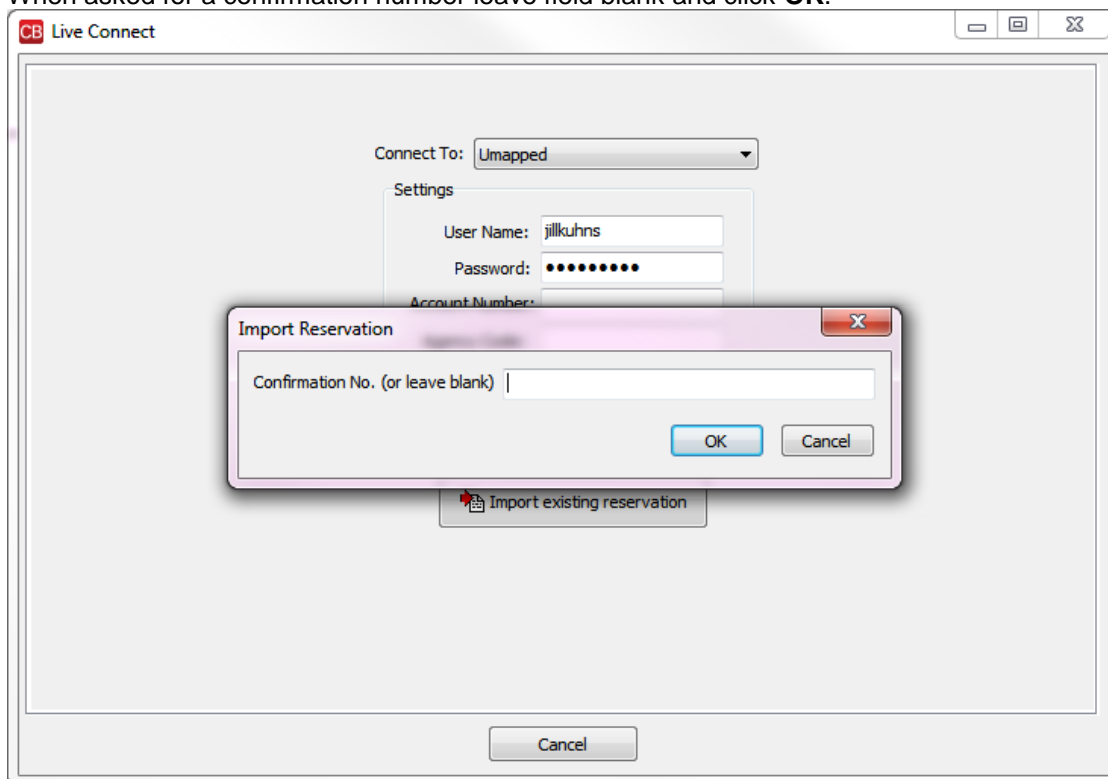# Import Reservations from Umapped with Live Connect

Step 1) Create a Res Card in **ClientBase**, enter key general information details such as the **Res Card Cycle, Marketing Source, Trip Name**, **and Travelers**

Step 2) For Umapped to import properly you must begin Live Connect from the Res Card level. To launch Live Connect click on the Live Connect button on the right side of your Res Card.

Step 3) Select Umapped from the drop-down menu by Connect To. If you have not already set up your login under **Utilities|My Login**, please make sure you add it here. If your login is not present, you cannot import a reservation. Then click **Import existing reservation**.

When asked for a confirmation number leave field blank and click **OK**.

Step 3) ClientBase will now connect to Umapped. Once the connection is completed, any trip itineraries you created in trip.umapped.com can be selected to import into ClientBase.

Step 4) Select your trip itinerary.

Step 5) Select the reservations to import into ClientBase.

Tip! Click on Select All to choose all the reservations in the trip itinerary or select individually which reservations to choose.

Tip! If your reservation says ClientBase, the reservation is already in an existing ResCard.

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Select Bookings to import to your Clientbase rescard. Then click "Next" to group bookings.

[Select All] [Next] [Close]

Mon Sep 24, 2018 Top

✈ **Flight to:** TPE Taiwan Taoyuan International Airport   **+ Select**

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	**12:35 AM** Mon Sep 24, 2018 **LAX:** Los Angeles International Airport	**5:30 AM** Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	1234566789	987654321	Included

Tue Sep 25, 2018 Top

✈ **Flight to:** DPS Ngurah Rai (Bali) International Airport   **+ Select**

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI771 Web Check-In	ABCDEF	**9:15 AM** Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport Terminal 2	**2:40 PM** Tue Sep 25, 2018 **DPS:** Ngurah Rai (Bali) International Airport Terminal 1

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

🚗 **Transfer**   **+ Select**

CONTACT	BOOKING #	PICK-UP	DROP-OFF
Tour East Indonesia	123456	**3:00 PM** Tue Sep 25, 2018 Denpasar Airport	Royal Pita Maha Resort

Step 6) After selecting all the reservations, click on Next.

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| | | | | Remove All | Next | Close |

Select Bookings to import to your Clientbase rescard. Then click "Next" to group bookings.

Mon Sep 24, 2018 Top

✈ **Flight to:** TPE Taiwan Taoyuan International Airport   − Remove

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	12:35 AM Mon Sep 24, 2018 LAX: Los Angeles International Airport	5:30 AM Tue Sep 25, 2018 TPE: Taiwan Taoyuan International Airport

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	1234566789	987654321	Included

Tue Sep 25, 2018 Top

✈ **Flight to:** DPS Ngurah Rai (Bali) International Airport   − Remove

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI771 Web Check-In	ABCDEF	9:15 AM Tue Sep 25, 2018 TPE: Taiwan Taoyuan International Airport Terminal 2	2:40 PM Tue Sep 25, 2018 DPS: Ngurah Rai (Bali) International Airport Terminal 1

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

🚗 **Transfer**   − Remove

CONTACT	BOOKING #	PICK-UP	DROP-OFF
Tour East Indonesia	123456	3:00 PM	Royal Pita Maha Resort

Step 7) To edit any Reservation Details, click on **Reservation Details.**

All fields can be edited. Please note that vendor information can also be edited once imported into ClientBase. Click **Save** to update reservation details.

Step 8) To group service providers booked with one vendor under the same reservation, click on **Select** then **Group.**

BALI VACATION - SEP 24, 2018 TO OCT 14, 2018

UnGroup   Group   Import   Close

To Group or Ungroup any booking(s): Select bookings, then click "Group" or "Ungroup" button.
Press the "import" button to import all bookings to your Clientbase rescard.

Reservation Details

✈ Flight to: TPE Taiwan Taoyuan International Airport   ➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	12:35 AM Mon Sep 24, 2018 LAX: Los Angeles International Airport	5:30 AM Tue Sep 25, 2018 TPE: Taiwan Taoyuan International Airport

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	1234566789	987654321	Included

Reservation Details

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PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

Reservation Details

🚗 Transfer   ➕ Select

CONTACT	BOOKING #	PICK-UP	DROP-OFF

*Tip! After grouping service providers together, update reservation vendor details for the entire group of service providers by selecting **Reservation Details***

BALI VACATION - SEP 24, 2018 TO OCT 14, 2018

[UnGroup] [Group] [Import] [Close]

To Group or Ungroup any booking(s): Select bookings, then click "Group" or "Ungroup" button.
Press the "import" button to import all bookings to your Clientbase rescard.

→ Reservation Details

✈ **Flight to:** TPE Taiwan Taoyuan International Airport   ➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	12:35 AM Mon Sep 24, 2018 **LAX:** Los Angeles International Airport	5:30 AM Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	1234566789	987654321	Included

✈ **Flight to:** DPS Ngurah Rai (Bali) International Airport   ➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI771 Web Check-In	ABCDEF	9:15 AM Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport Terminal 2	2:40 PM Tue Sep 25, 2018 **DPS:** Ngurah Rai (Bali) International Airport Terminal 1

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

*Tip! If service providers were grouped in error, select the service provider then click **Ungroup**.*

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→ [UnGroup] [Group] [Import] [Close]

To Group or Ungroup any booking(s): Select bookings, then click "Group" or "Ungroup" button.
Press the "import" button to import all bookings to your Clientbase rescard.

Reservation Details

✈ **Flight to:** TPE Taiwan Taoyuan International Airport   → ➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	12:35 AM Mon Sep 24, 2018 **LAX:** Los Angeles International Airport	5:30 AM Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport

PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
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✈ **Flight to:** DPS Ngurah Rai (Bali) International Airport   → ➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
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PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

Step 9) Once details are completed, select **Import** to transmit reservation details to ClientBase

BALI VACATION - SEP 24, 2018 TO OCT 14, 2018

| UnGroup | Group | Import | Close |

To Group or Ungroup any booking(s): Select bookings, then click "Group" or "Ungroup" button.
Press the "import" button to import all bookings to your Clientbase rescard.

Reservation Details

✈ **Flight to:** TPE Taiwan Taoyuan International Airport

➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	**ABCDEF**	**12:35 AM** Mon Sep 24, 2018 **LAX:** Los Angeles International Airport	**5:30 AM** Tue Sep 25, 2018 **TPE:** Taiwan Taoyuan International Airport

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Reservation Details

✈ **Flight to:** DPS Ngurah Rai (Bali) International Airport

➕ Select

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
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PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

Reservation Details

🚐 **Transfer**

➕ Select

CONTACT	BOOKING #	PICK-UP	DROP-OFF

Step 10) After selecting **Import**, a summary screen of the reservation details will be displayed.

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Close

✈ Flight to: TPE Taiwan Taoyuan International Airport

AIRLINE CODE & FLIGHT #	BOOKING #	DEPARTURE	ARRIVAL
China Airlines CI007 Web Check-In	ABCDEF	12:35 AM Mon Sep 24, 2018 LAX: Los Angeles International Airport	5:30 AM Tue Sep 25, 2018 TPE: Taiwan Taoyuan International Airport

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PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	2A	First Class	123456789	987654321	Included

🚐 Transfer

CONTACT	BOOKING #	PICK-UP	DROP-OFF
Tour East Indonesia	123456	3:00 PM Tue Sep 25, 2018 Denpasar Airport	Royal Pita Maha Resort

Step 11) When the reservation details are showing, click **Import Reservation** and the details of the reservation will automatically populate the customer's reservation in ClientBase.
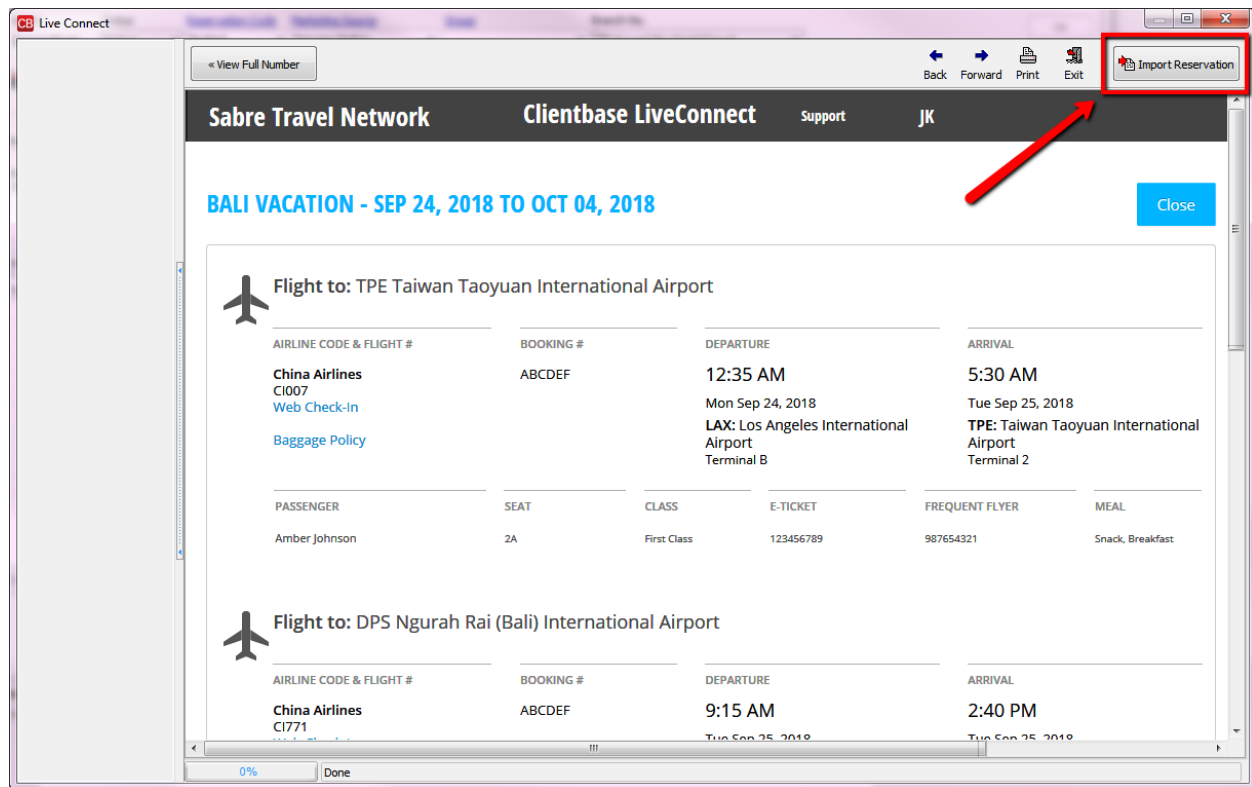
Tip! if the Vendor Code is not found, select **Query for Vendor by Name** *and map all the reservations to your correct vendor.*

If you need further assistance or have additional questions, please contact support@umapped.com