

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.

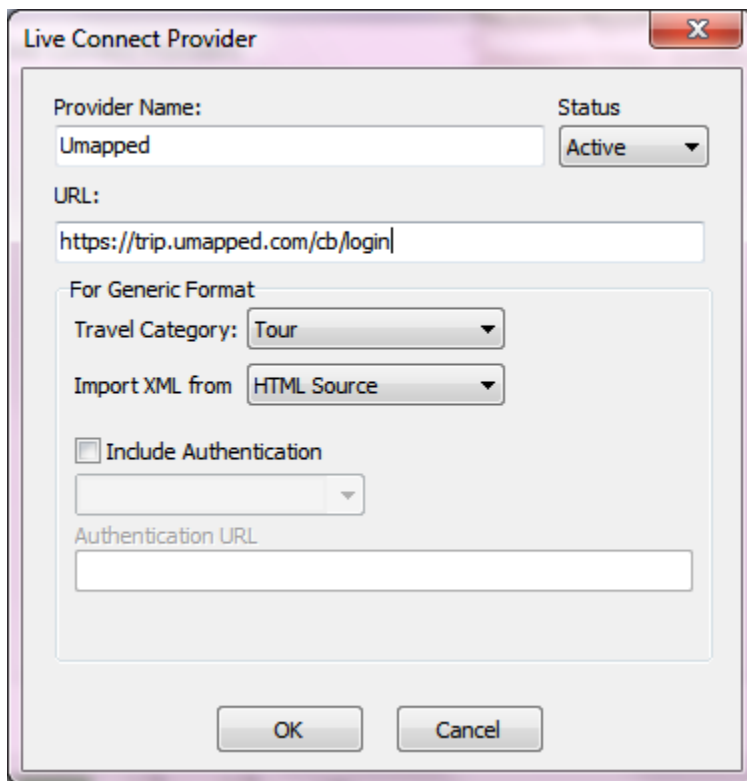
To register with Umapped, visit their sign-up URL: <http://umapped.com/trial/>

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:

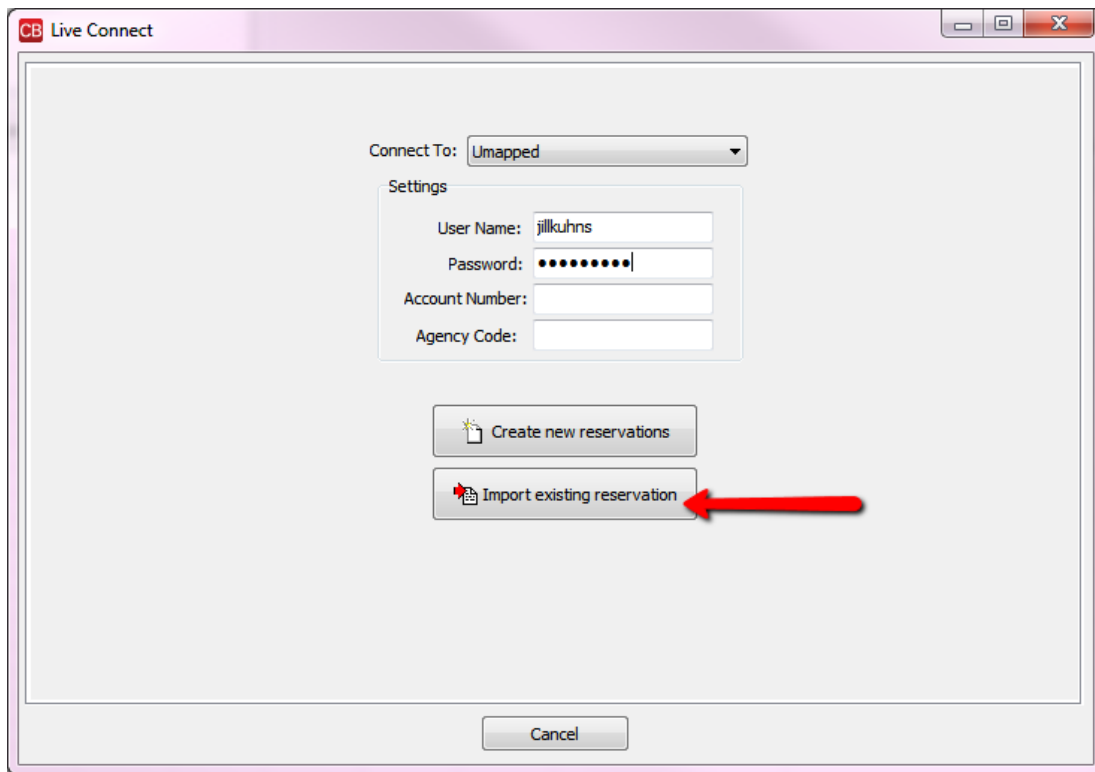
- ☐ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)
 - ☐ Automatically logs you into booking engine with User Login data from *ClientBase*.
 - ☐ Populates booking engine with profile data from *ClientBase*.
 - ☐ Sends reservation details from booking engine's confirmation page to *ClientBase* 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

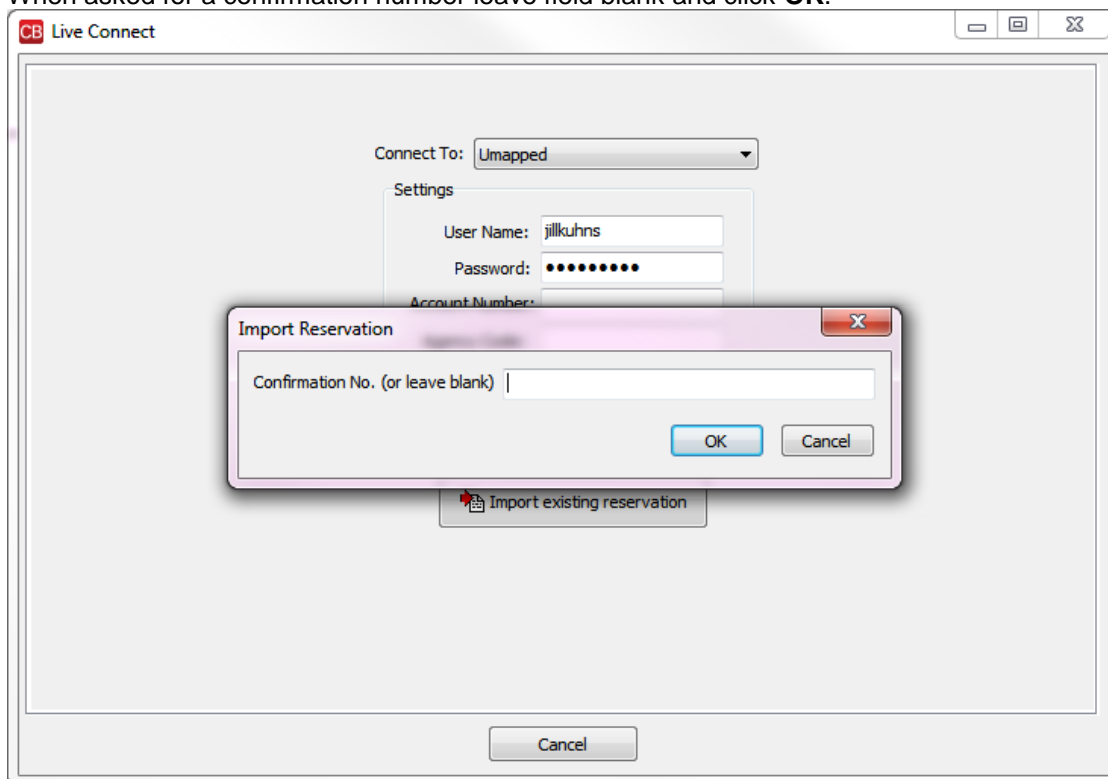
Step 1) Create a Res Card in **ClientBase**, enter key general information details such as the **Res Card Cycle, Marketing Source, Trip Name, and Travelers**

The screenshot displays the 'Res Card' form in ClientBase. At the top, it shows reservation statistics: Res Total (0.00), Invoiced Total (0.00), and Balance (0.00). Below this is a toolbar with icons for Invoice, Proposal, Itinerary, Statement, Go To, Remind, Letter, E-mail, and Label. The form fields are organized into sections: 'Create Date' (6/8/2018), 'Agent' (Sharon Meyer), 'Status' (Active), 'Reservation Cycle' (Booked), 'Marketing Source' (Princess Mailing), 'Group' (empty), and 'Branch No.' ([0] Around the World Travel). The 'Prepared for' section includes 'Trip Name' (Spanish Adventure), 'Locator No.' (empty), 'Region' (Europe), 'Destination' (Spain), 'Trip Start Date' (empty), and 'Trip End Date' (empty). The 'Addresses' section has two columns: 'Client Ship To Address' and 'Client Bill To Address', both with checkboxes for 'Use Profile Ship To' and 'Use Profile Bill To'. Both columns show the address: Allison Vance, 3322 Northwest Boulevard, Washington, DC 20024. The 'Travelers' section on the right lists Vance/Allison Michelle and Vance/Jason Michael.

[illegible]



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.

CB Demo**Clientbase**
LiveConnect

Support

CD

MY TRIPS



Keyword *

Filter Trips By Date

Trip Status

☐ Company Trips

Show **trips**

	NAME	DATE	STATUS	CREATED BY	
	Bali Vacation	Sep 24, 2018 - Oct 14, 2018	Published	cbdemo	View
	Bali Vacation Copy	Sep 24, 2018 - Oct 14, 2018	Published	cbdemo	View

Previous Next

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.

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

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 #

China Airlines
CI007
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

12:35 AM

Mon Sep 24, 2018

LAX: Los Angeles International Airport

ARRIVAL

5:30 AM

Tue Sep 25, 2018

TPE: Taiwan Taoyuan International Airport

PASSENGER

FName LName

SEAT

3B

CLASS

First Class

E-TICKET

123456789

FREQUENT FLYER

987654321

MEAL

Included

Tue Sep 25, 2018 [Top](#)



Flight to: DPS Ngurah Rai (Bali) International Airport

[+ Select](#)

AIRLINE CODE & FLIGHT #

China Airlines
CI771
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

9:15 AM

Tue Sep 25, 2018

TPE: Taiwan Taoyuan International Airport
Terminal 2

ARRIVAL

2:40 PM

Tue Sep 25, 2018

DPS: Ngurah Rai (Bali) International Airport
Terminal 1

PASSENGER

FName LName

SEAT

2A

CLASS

First Class

E-TICKET

123456789

FREQUENT FLYER

987654321

MEAL

Included



Transfer

[+ Select](#)

CONTACT

Tour East Indonesia

BOOKING #

123456

PICK-UP

3:00 PM

Tue Sep 25, 2018

Denpasar Airport

DROP-OFF

Royal Pita Maha Resort

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

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

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

[Remove All](#) [Next](#) [Close](#)

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**.

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 rescad.

Flight to: TPE Taiwan Taoyuan International Airport

AIRLINE CODE & FLIGHT #

China Airlines
CI007
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

12:35 AM
Mon Sep 24, 2018
LAX: Los Angeles International Airport

ARRIVAL

5:30 AM
Tue Sep 25, 2018
TPE: Taiwan Taoyuan International Airport

PASSENGER

FName LName

SEAT

3B

CLASS

First Class

E-TICKET

123456789

FREQUENT FLYER

987654321

MEAL

Included

Reservation Details

+Select

Flight to: DPS Ngurah Rai (Bali) International Airport

AIRLINE CODE & FLIGHT #

China Airlines
CI771
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

9:15 AM
Tue Sep 25, 2018
TPE: Taiwan Taoyuan International Airport
Terminal 2

ARRIVAL

2:40 PM
Tue Sep 25, 2018
DPS: Ngurah Rai (Bali) International Airport
Terminal 1

PASSENGER

FName LName

SEAT

2A

CLASS

First Class

E-TICKET

123456789

FREQUENT FLYER

987654321

MEAL

Included

Reservation Details

+Select

Transfer

CONTACT

BOOKING #

PICK-UP

DROP-OFF

Reservation Details

+Select

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

Edit Reservation

Enter Reservation Info

Provider Type

Air

Reservation Vendor

China Airlines

Total Cost

1400.00

Total Taxes

324.00

Confirmation Number

ABCDEF

Save


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**

AIRLINE CODE & FLIGHT #

China Airlines
CI007
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE


12:35 AM
Mon Sep 24, 2018
LAX: Los Angeles International Airport

ARRIVAL

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

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

AIRLINE CODE & FLIGHT #

China Airlines
CI771
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE


9:15 AM
Tue Sep 25, 2018
TPE: Taiwan Taoyuan International Airport
Terminal 2

ARRIVAL

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

Reservation Details

 **Transfer**

CONTACT	BOOKING #	PICK-UP	DROP-OFF
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+Select

*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

AIRLINE CODE & FLIGHT #

China Airlines
CI007
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

12:35 AM
Mon Sep 24, 2018
LAX: Los Angeles International Airport

ARRIVAL

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

AIRLINE CODE & FLIGHT #

China Airlines
CI771
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

9:15 AM
Tue Sep 25, 2018
TPE: Taiwan Taoyuan International Airport
Terminal 2

ARRIVAL

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**.*

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

AIRLINE CODE & FLIGHT #

China Airlines
CI007
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

12:35 AM
Mon Sep 24, 2018
LAX: Los Angeles International Airport

ARRIVAL

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

AIRLINE CODE & FLIGHT #

China Airlines
CI771
[Web Check-In](#)

BOOKING #

ABCDEF

DEPARTURE

9:15 AM
Tue Sep 25, 2018
TPE: Taiwan Taoyuan International Airport
Terminal 2

ARRIVAL

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

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		
PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	123456789	987654321	Included

Reservation Details

✈ 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

Reservation Details

🚗 Transfer + Select

CONTACT	BOOKING #	PICK-UP	DROP-OFF
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Step 10) After selecting **Import**, a summary screen of the reservation details will be displayed.

CB Demo


Clientbase
LiveConnect

Support


CD

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


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		
PASSENGER	SEAT	CLASS	E-TICKET	FREQUENT FLYER	MEAL
FName LName	3B	First Class	123456789	987654321	Included

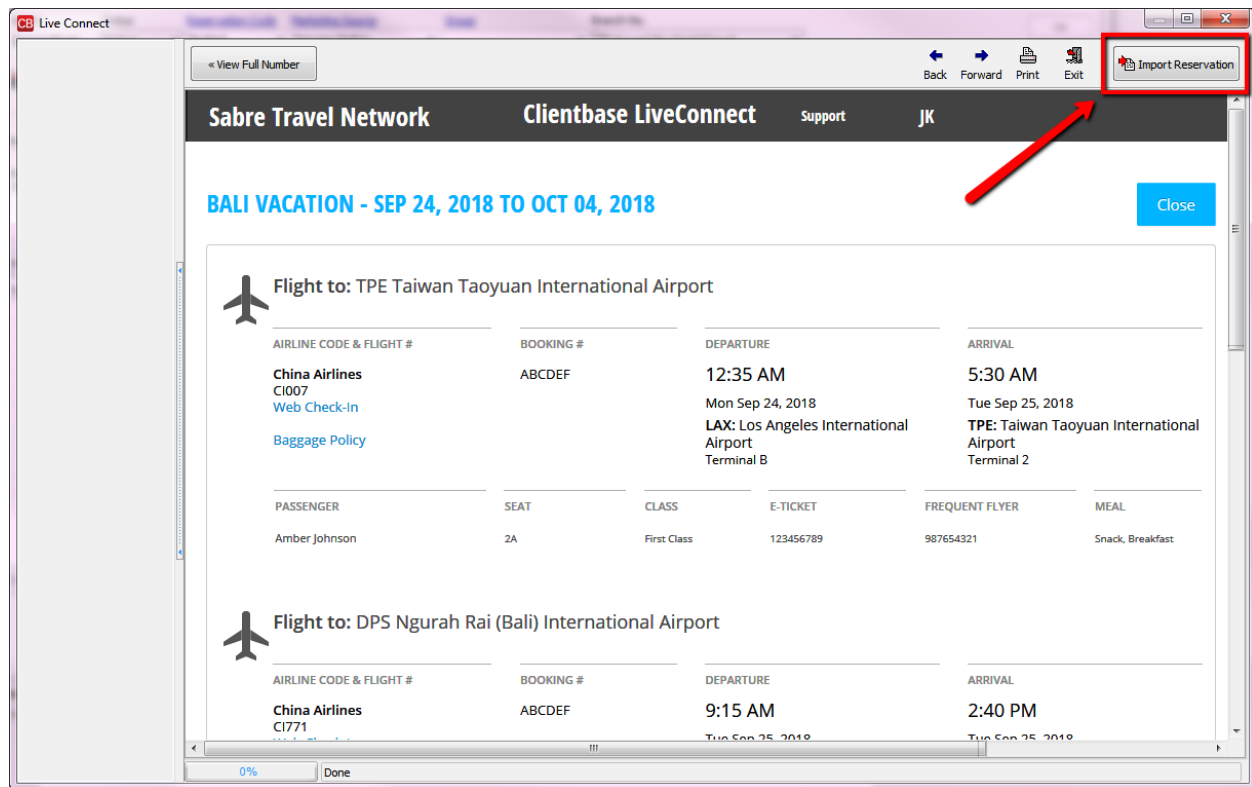
 **Flight to: DPS Ngurah Rai (Bali) International Airport**

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**

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