

Insight Vacations

If you are not currently registered to book Insight Vacations as a new agency set-up, please visit: <https://www.insightvacations.com/us/agent-area/register>. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Insight Vacations Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Once you have obtained accurate login information, you need to make sure this Live Connect Provider is in *ClientBase* by going to **Tools|Settings|Live Connect Providers** and clicking *Add* if not present (make sure the URL below is correct).

Provider Name: Type Insight Vacations.

URL: Type: <https://book.itopics.com/BookingWizard/TramsLiveConnect.aspx?sc=IVUSAS>

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source*.

Step 2) Each user can put in his own login information under **Tools|My Login|Live Connect** or enter one set of login information for a Live Connect provider for all agents by going to **Tools|Settings|Live Connect Login**. Click *Add* and enter the following information:

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted Insight Vacations. (The Agency Number and Code is not applicable.)

Step 3) Retrieve the Insight Vacations vendor profile from the Profile Manager (or create one if not in your database). From the General Info link, click the *Live Connect Providers* button. Click *Add*, and select *Insight Vacations* booking engine from the drop-down list. There is no Vendor Code. In the *Travel Category* profile field, select *Tour* from the drop-down menu.

Live Connect Features Supported by Insight Vacations

Insight Vacations supports the following Live Connect Features if checked:

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

Automatically logs you in to 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*).

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 reservations details.

Importing an Insight Reservation into ClientBase

Step 1) When you are ready to import a reservation that was previously made with Insight Vacations, retrieve the desired client profile, create a new Res Card and after entering basic Res Card info (no need to add travelers), launch Live Connect by clicking *Live Connect* on the menu bar. (You can also launch Live Connect from the Profile action gear.)

The screenshot displays a software interface with a top navigation bar containing buttons for 'Generate Invoice', 'Trip Proposal', 'PNR', 'Live Connect' (circled in red), 'Note', 'Mailer', and 'Reminders'. Below this, there are two buttons: 'Cancel' and 'Import Existing Reservation' (with a green plus icon), and another button 'Create New Reservation' (with a green plus icon). The main area is divided into two sections. The first section, 'Live Connect Settings', includes fields for 'Vendor', 'Connect To', 'User Name', 'Password', 'Account No.', 'Branch' (a dropdown menu showing 'Travel With the Stars'), and 'Agent' (a dropdown menu showing 'Sharon Meyer'). The second section, 'Import Existing Reservation', contains a 'Confirmation No.' field.

Step 2) Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information.

Step 3) Click *Import Existing Reservation*.

Step 4) Although still in *ClientBase*, you are now on-line at the Insight booking site and you will see your reservation. Click *Import Reservation*. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



If you need help using the Insight Vacations booking site, go to contactus@insightvacations.com.