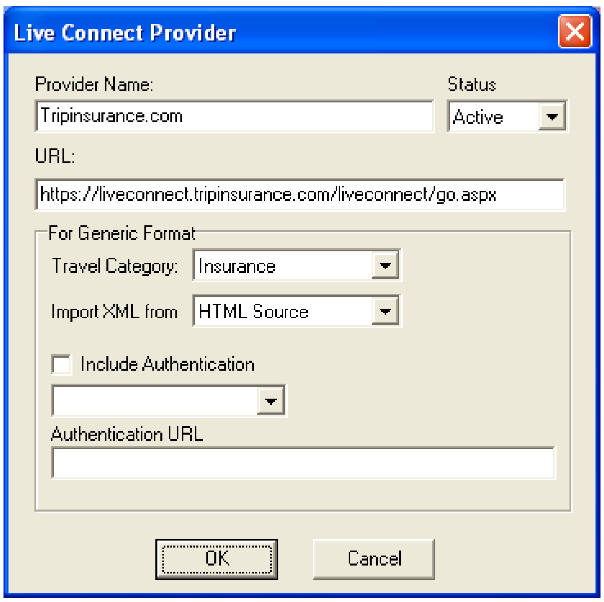
Tripinsurance.com (Formerly Global Alert -MH Ross Agency)

To use Live Connect to purchase Tripinsurance.com, you must be an authorized Tripinsurance.com (formerly Global Alert - MH Ross Agency) representative and be assigned a User Login, Password, and Account Number for use. To become an authorized agency, and/or to obtain a User Login, Password, and Account number, call, Sheri A. Machat at Tripinsurance.com, 800-423-3632 x510.

Set Up Tripinsurance.com

Upon receiving a User ID and password for each agent in your office, take the following steps to setup ClientBase for Live Connect.

Step 1) Make sure you have a correct URL for this agency. To do so, go to **Utilities|Live Connect Providers,** and scroll down to see if Tripinsurance.com is one of the providers. If not click *Add:*



Provider Name: Tripinsurance.com

Status: *Active.*

URL: https://liveconnect.tripinsurance.com/liveconnect/go.aspx

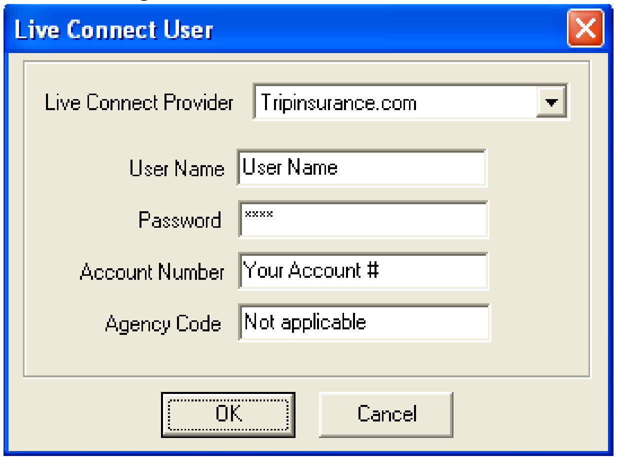
Travel Category: Insurance.

Import XML from: HTML Source.

Include Authentication, etc.: Not applicable.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or 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 looks for the login information at the Global Defaults level.

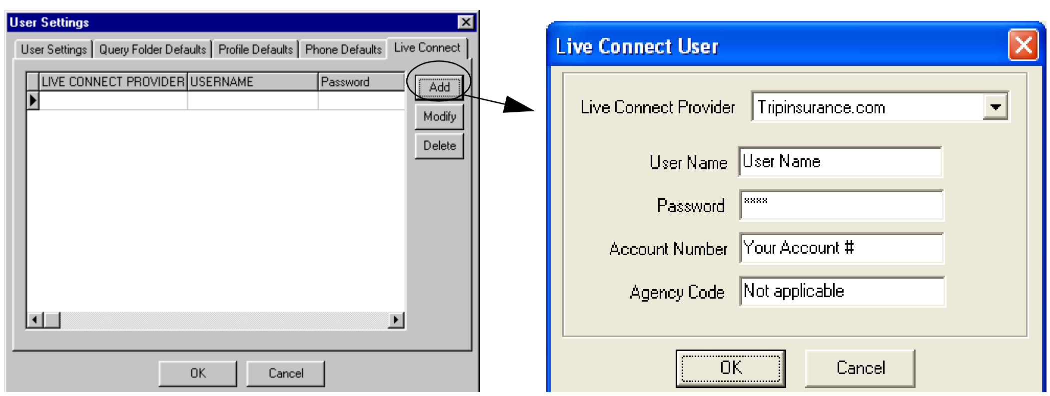
<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:



Live Connect Provider: Select Tripinsurance.com from the drop-down list.*

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

<u>Set Up Individual Agent Login Information:</u> Users can setup their own logins by going to **Utilities|MyLogin|Live Connect**. The database administrator can also do this for **each** user login by clicking on the Live Connect tab in the User Settings after logging into ClientBase as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Tripinsurance.com by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*



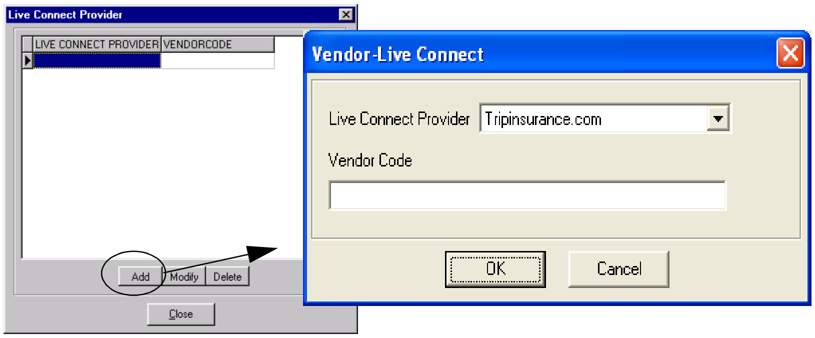
Complete the following fields (the other fields are not applicable):

Live Connect Provider: Select Tripinsurance.com from the drop-down.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted provider. Click *OK*.

Step 2) From the profile manager, retrieve the Tripinsurance.com vendor profile (or create if it is not in database). From the General Info tab click *Live Connect Providers*. From here, click *Add*, then select

Tripinsuance.com from the drop-down list. The vendor code is left blank. Click *OK*.



Add appropriate Live Connect Provider, Tripinsurance.com (selected from drop-down menu) and leave the vendor code blank.

Step 3) Setup insurance prompting by going to **Global Defaults|Res Card Insurance Prompting**. (See chapter, *Setting Up ClientBase for Your Agency.)*

Tripinsurance.com Features

Tripinsurance.com supports the following Live Connect features if checked off by ✓:

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

✓ 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.

__ **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.

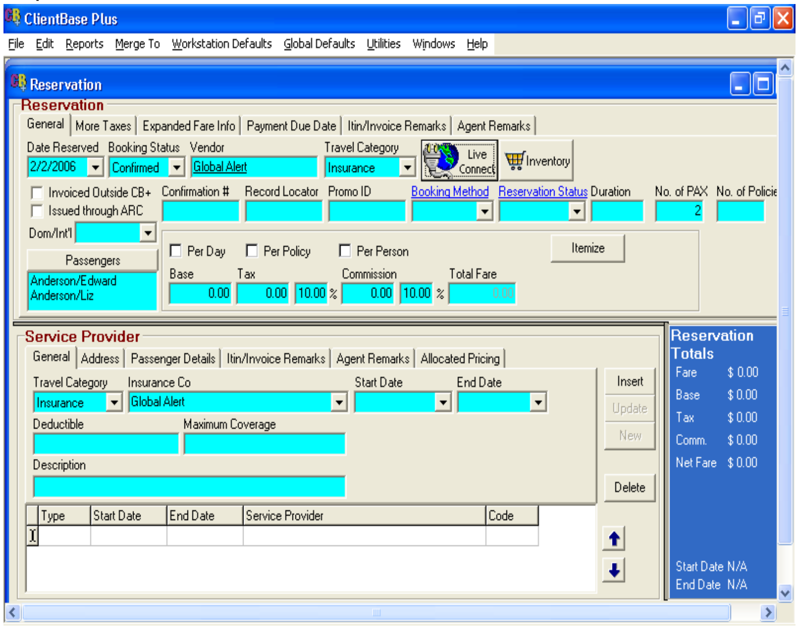
__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to ClientBase reservation record.

__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Global Alert Reservation

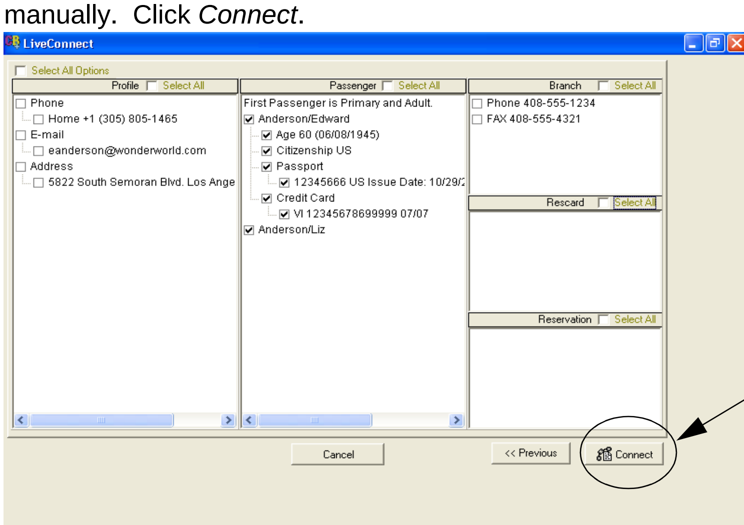
Step 1) Click *Reservation* Tab and *Add* in the Res Card. Fill in the *Travel Category,* select

Tripinsurance.com as the vendor and click *Live Connect.*



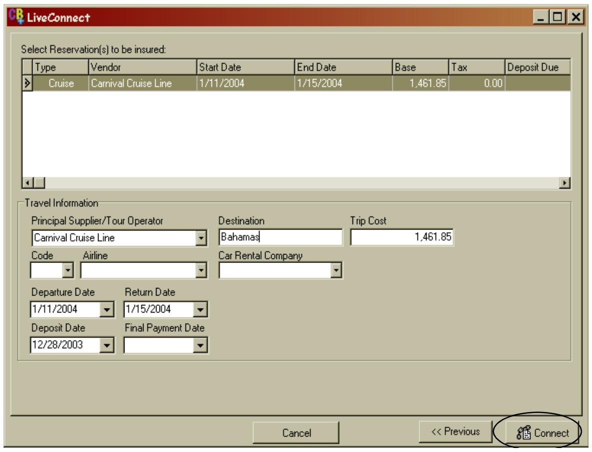
Step 2) Select Tripinsurance.com from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Tripinsurance.com and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.

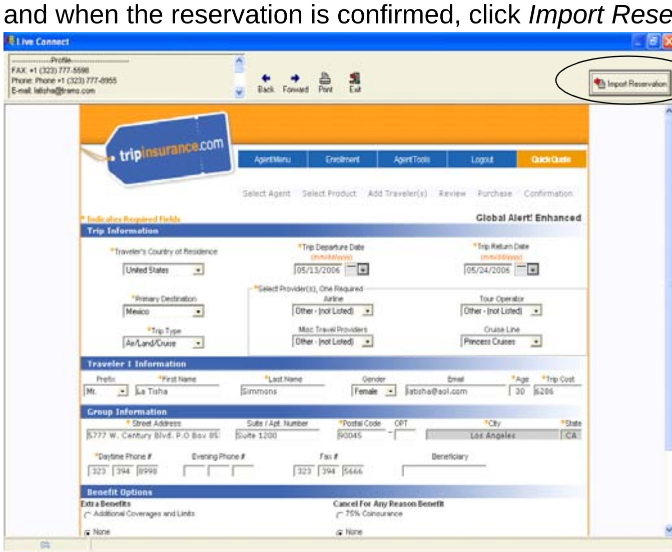


Select any customer info for use. Use the *Select All* check boxes for easy selection of entries. Click *Connect* to continue.

Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Tripinsurance.com website confirming the insurance booking. Click *Connect.*



Step 5) Although still in ClientBase, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.



Import
Reservation

All reservation data booked on-line is now located in the reservation fields in ClientBase.