



Client Base Instructions

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Instructions for using Client Base (CB)

Requires Internet Explorer

Client Base Website URL: <http://www.clientbaseonline.com/login>. Start by going to the Client Base website by following the link from the CCE website OR from internet explorer typing in the URL. Log in using your assigned password and the Sabre PCC (pseudo city code): **Z57F**. **** If you have forgotten your password or you receive an error – Do Not press forgot password, please contact your ASC.** Save this link in your favorites so you can locate it easily. **This program requires Internet Explorer to complete all steps.**

Step 1 - Finding an existing profile or creating a new profile

Each primary client must have their own profile which includes name and contact information – it is important that you only create *one* profile for each client. Always search to see if your client has an existing profile before creating a new one. **If the client has booked with our company previously through another IC please ask your ASC to change the agent name in the profile to yours before creating another profile!

Existing Client Profile

If this is an existing client and a profile for your client has already been created, you can query the client by entering the client's last name in the box next to Profile Name/Company and click the Find tab. **You should always double check so you don't create another profile for an existing client.** If they are already in the data base, you would click View in the box next to their name, and continue to Step 4- the RES CARD.

Creating a New Client Profile

For new clients you will need to create a profile by clicking on the **PROFILES** icon at the top of the screen and choose Leisure. When the Create Leisure screen pops up you can create the profile.

Fill out the following:

- **General Info:** Lead Client Last Name, First Name, Middle Name, adding as much detail as possible. *Please do not list two names—use the main contact person. For example, list “John” as the first name—not “John & Jane”. Jane can then be listed as a family member, and also as a second name on the “additional name” field.
- **Address:** Client Address – **Please double check to make sure the address is in the correct postal format.** It is important that you choose the correct Country Name, for example instead of USA use US or leave blank. For other countries please use the list in the forms library under CB correct country names. Please also double check your state information, that you have the correct initials.
- **Communications:** Add all telephones and E-mail addresses (if you do not have an email leave this blank).
- **Additional Info:**
 - **Interface ID:** Use the client's phone# - no dashes.
 - **Referred By:** Use the drop down menu and choose the most appropriate description. This is how they initially came to you. Once you start a Res card, each time you will record how this trip was referred to you.
 - **More Fields:** Lead/Personal – please specify if this is a personal client or a lead client.

****Notes for Lead clients:** In addition to entering a profile for each quote request you are also required to create a RES Card and select “**prospect**” under reservation cycle and use “**prospect**” as the confirmation #. Do not input trip start/end dates or prices until they have actually deposited. After the client makes their deposit you want to query the profile, click on RES Cards then **View** the prospect RES Card and click **edit** to update to the correct information, **save**, update step 3, and continue to step 5.



After hitting "NEXT", you will be brought to another small screen. You can enter any additional information for this primary client

CLICK SAVE Double check all profile information before continuing -- edit if necessary

If you do not have permission to send email marketing to your client, you will need to go under the profile's Communications area, click edit and uncheck the marketing permission box and click save.

Step 2 – Marketing

The marketing section is designed to capture information for marketing purposes and also for those clients that receive our mailed marketing through Signature. Choose MARKETING CODES from the menu box - click edit, then check all that apply to your client's interests. We suggest you send *mailed* marketing and emailed marketing to your clients based upon their specific travel history and plans. Any updates to a client's profile will be reflected in Signature's e-marketing center the next day.

- **Email Marketing:** The marketing area is a great way to keep track of your clients' future travel interests, and when tied to an email address they will receive free direct marketing if the email marketing permission box is checked. Choose all that apply; you can always update this area as you learn more about your clients' interests.

Notes:

- Always try to have our weekly General Newsletter and Disney emailers selected:
 - General Leisure Newsletter
 - Disney Destinations & Cruises
- Please do not select "All cruise offers" or "All land offers"; this will cause your clients to receive too many emailers, not tailored to their interests.
- Please do not select anything that says "only". For example, if you select "upscale cruising only", then your clients will receive none of our emailers. Our emailers are generic, and do not cater specifically to just one cruise line or segment.
- To change the frequency of emailers going to your clients, you must go to the Signature website (www.signaturetravelnetwork.com). In the Emarketing Center, when you look at a client profile you will see a section called Subscription Changes, this is where you would update the client. The client may also update on his/her own, by clicking the link at the bottom of the emailers to update their settings.
- **Direct Mail:** Option 9 **Mailing Parameters** is for those clients you would like to receive from you, the Travel Magazines created by Signature Travel Network. By checking the travel magazines, you will ensure your clients receive these beautiful publications with your contact information printed on the back. **You will be billed for the mailed marketing.** Marketing will be contacting you throughout the year when these publication orders are due.
- **Touch Base Marketing:** Do enter birthdays and anniversaries and then your clients with email addresses in their marketing parameters will receive personalized Touch Base greetings from you that the marketing system sends automatically. If you have a client who does not want to receive these greetings, select "No Touch Marketing" for them.
- **Entering Prospective clients:** If you have a prospective client that you would like to market to (email or mailed marketing) you will need to create a profile by following the steps for marketing permission above.
- If your client does not want email or direct marketing, check those that apply.

Double check preferences and edit if necessary, you may do this at any time as you learn more about your client. Click SAVE

Step 3 – Adding Travelers

** Adding travelers will allow you to use the drop down menu when adding passengers to this or any future booking after creating the RES card. This area will also allow you to add personal information about each additional traveler. Add as much information as possible such as full legal names, birthdates, anniversaries, passport #'s, and Frequent Flyer #'s. This is particularly helpful when using Live Connect!



After you have saved this information, click "SAVE."

Step 4 - Creating a RES CARD

[Jump to How To Importing a Reservation for Disney Cruise Line with Live Connect](#)

[Jump to Importing a Reservation for Disney with Live Connect](#)

[Jump to Creating a Reservation for Sabre Cruise with Live Connect](#)

[Jump to Importing a Reservation for Sabre Cruise with Live Connect](#)

[Jump to Creating a Reservation for Polar Online with Live Connect](#)

[Jump to Importing a Reservation for Polar Online with Live Connect](#)

**The RES Card is where you store information pertaining to a specific booking; a client may have several RES Cards under one profile, one for each vacation or trip, each will require a ONE RES card as the file folder for that vacation. A RES Card may have multiple components for a trip; i.e.: Flights, Transfers, Cruise Excursions and TravelEx, each component will have a reservation.

For Each new vacation, you create ONE RES CARD – this is your file folder for the client's trip. To create a new trip, choose Res Card from the menu, then from the "Create Res Card" drop down menu, select Res Card. (Note – RES CARDS are created first by each agent, then Live Connect may be used to create each reservation within the Res Card. A RES Card should be viewed as a "folder"; this folder will hold all the reservations for a trip. For example, if your client books a cruise and insurance (outside the cruise bundle). Each of these may have their own reservation, but all will be booked under the same Res Card -- one reservation for the Crystal cruise, one for Travelex insurance. Another family is going to Walt Disney World, Christmas Party, and Disney Cruise on one trip. This will have one res card, but three reservations listed in the res card: one for the WDW package, one for the party tickets, one for the cruise.

When the "Create RES Card" page comes up enter the following information:

- **Agent name and Create date:** These will automatically fill in
- **Branch:** CruisingCo.com
- **Status:** Active
- **Reservation Cycle:** Use the drop down menu – choose either *under deposit, paid in full*, or *prospect*. Note: "Prospect" is used for someone who has not booked or reserved anything yet—for example, a lead who asks for a price quote. If someone has a CC guarantee (no charge) or just a hold (like a hotel room with no deposit, just a credit card hold), this client is still considered "Under Deposit". *You must enter a RES Card for all reservations including holds that do not require a deposit.*
- **Marketing Source:** The marketing source has changed: How did *this* trip originate? A client phone call, client e-mail, E-marketing, print marketing or from Social Media?
- **Group:** If this is a group booking - Enter the number assigned to your group by the cruise line:
 - Example: Holland America Cruise group # 12345 – enter: 12345
- **Region:** Use the drop down menu and choose the appropriate destination
- **Destination:** Select the most appropriate location
- **Trip Name:** for example: WDW, Disneyland, RCL Caribbean or Princess Alaska cruise, Hawaii package, DCL Magic, etc. We suggest using the trip name and month/year. For example, **WDW May14** or **Hawaii Oct14**.
- **Locator #:** The locator # is the same as the confirmation/booking number. Do not include dashes or spaces when entering the number.
- **Trip start/end date:** Fill in the correct start and end dates. **CLICK SAVE**

Double check the RES card information – edit as necessary

Step 5 – Attaching the detailed supplier confirmation

- **Very Important:** Attachments must be saved in the RES Card page, not the Profile page.



- You will need to save the supplier's confirmation in your documents file in your computer (as a word, pdf or html file) for this client. Once saved, you will need to attach it in the **RES Card**, to do so click on Attachments in the menu box and then click on the Add box and browse for the saved supplier confirmation, click on the confirmation; it will appear in the Browse for Attachment box, in the Description field type **supplier confirmation or a descriptive name** and save.
- If your client has been acquired as a **lead**, click on the More Fields section and add the lead ID by clicking on edit and inputting the quote ID number. If it is a referral, click on edit and put the Referrer (name) then save and continue on to step 6.

Step 6 - Adding Passengers

Click on **Travelers** in the menu box - Click Add

1. Use the drop down menu to add the primary passenger then click save. You have added the first passenger.
2. Now click the "Add" button and use the drop down menu to add any additional travelers. If the traveler already exists under another profile, then you will get the option to "link" to this profile. In this example, William Cambridge already had his own profile, so when I typed his name, it simply asked if I wanted to LINK him to George Cambridge's profile. I chose YES and hit LINK.

Make sure to double check that you have ALL passengers listed before moving on.

Step 7 – Creating a Reservation

1. Choose **Reservations** from the menu box then choose the appropriate type of reservation from the Add Reservation drop down, for example;
 - o Insurance
 - o Tour - includes all packages – All Inclusive package, Hawaii vacation, WDW or DLR vacations, Fly-Drive trips
 - o Cruise
 - o Miscellaneous - ****note-if purchasing tickets (party tickets, park tickets) outside of a package, use "miscellaneous"**
2. **Vendor name: Type in the 1st few letters of the supplier name then** use the drop down menu (typing in the letters "WALT" will narrow your search to the Walt Disney Travel companies) and choose the most appropriate vendor (if you do not see the vendor you are using; contact your ASC to have it added). Please see final page of this document for additional tips for choosing the various Disney products. **If your reservation is part of a group, please see the notes under additional information.**
3. **Confirmation Number and Record locator are the same as the locator number used on the RES card**
4. **Booking Method:** This is the same as the marketing source used for the RES CARD
5. **Reservation status:** Leave this blank
6. **Duration:** Make sure to enter the duration for this trip; this is the number of nights.
7. **Number of Passengers:** If you selected passengers properly, this is pre-filled. If it is empty, close the Reservation, return and complete all steps as required above.
8. **Total:** Leave the charge as box blank, use the total cost of the trip as the base, enter the total for taxes, and enter the commission amount in the commission section, disregard the %.
9. **Payment Due Date:** Use the final payment due date quoted to the client, about 10 days prior to actual supplier final payment date. This allows you to process the client's payment properly.
10. **Itin/Invoice Remarks:** Leave this section blank, any comments will show up on the invoice.
11. **Agent Remarks:** Use this area to add comments about trip details; this is a fabulous tool for tracking conversations with the client for future reference.

CLICK SAVE

Use the next screen to confirm all of the reservation details



Step 8 - Editing the date – only necessary if you are not using Live Connect

After you save this you will need to go to the box at the bottom of the page, and click Edit next to the travel type and enter the travel dates again and then save. **If you miss this step, the travel dates WILL NOT show up on your invoice or commission report!**



Last chance to double check that everything pertaining to this reservation is correct before you do the invoice!!!

Now that you have confirmed that all details are correct you can close the reservation and move on to the invoice!

Step 9 – Creating the Invoice

This requires Internet Explorer to complete.

After closing the reservation you will return to the RES Card screen, now it is time create the invoice that you will provide to your client. Click the Generate Invoice button at the top.

1. You will now see an Insurance prompt. This is a reminder to quote TravelEx to clients; you can do this through Live Connect.
2. Click on the Remarks button under the text box and a larger window will pop up: use this window to add the trip details; you will find that many of the remarks are pre-filled but you will need to add or remove comments to fit the destination. Invoice remarks:
 - a. Review Comments and select correct Insurance disclaimer
 - b. ICs now invoice all client payments and final payments. Each time you update their reservation, send your client an updated invoice with each payment. Adjust comments to state reason for each invoice: i.e. “Purchased and paid for TravelEx policies” or “Made \$500 additional payment” or “Purchased and paid for Excursions” or “Made Final trip payment”, customize email note to clients when sending the invoice.
 - c. Trip summary remarks; if a change was made must say: ****Price revised to reflect -----**. All other information provided on your original invoice remains unchanged.
3. Make sure to add the final payment due date.
4. Under Invoice Payment, form of payment, use the drop down menu to select the Credit Card used for the payment or enter your client’s credit card number. (The most secure method is to save your client’s credit card number in their profile.) Move down to the box under **Sale** and fill in the deposit amount that you are invoicing. Full payment will automatically fill in, but you will need to change the amount for **this Invoice** by highlighting the amount, changing it to the amount paid. When they pay in full, do not “zero out” the commission amount. Commission amounts will not print on the invoice.
5. Under the box on the right “Travel Type”, use the drop down menu to enter the appropriate travel type. This has changed- please notice new items such as: preferred with + sign. (“Pref +” means over 14% Commission)
6. **“ Do not use” categories must not be selected. Contact your ASC if you are unsure of the Travel Type.** Under “Submit to”, use the drop down menu to select **Comm Track for credit card deposits**. **It is extremely important that you select this!**
7. **VERY IMORTANT!** For Comm Track (Credit Card) payments you then check the box that says **Show as Paid** in order for the invoice amount to show up on your invoice.

VERY IMPORTANT! Under Agent, ensure your name is selected and if shown multiple choices, check “Inside Rate” for all lead client bookings or “Outside Rate” for your personal client bookings – this ensures your commission percentage is correct.



8. Double check your screen for accuracy! Once you are confident that the remarks and all of the boxes have been completed correctly, you must preview the invoice to double check for Names, dates, total sale and invoice amount – DO NOT GENERATE Invoice if you need to go back and make changes.
9. Preview invoice, you may click preview to verify trip cost and client names, you will not be able to preview the entire invoice. If you have entered CC as a payment type you will get a pop up box that says *"The credit card number entered appears to have a typographical error or it is not a valid credit card"* Do you want to continue? Click OK.
10. Once you have verified that the comments and other components are correct you may generate the invoice. Click [Generate Invoice](#) (you may have to hold down the control key while clicking the generate invoice tab to disable the pop up blocker). Once generated, you will email a copy to your client and may also save a copy to send to your client with their paperwork. To keep a copy in your documents, you will need to save it to an adobe file (click "file, save as", name the invoice and save in your client's file on your computer).
 - a. After you generate the invoice, return to the RES Card "Invoice" page
 - b. There are three choices (reprint, E-mail, and Void)
 - c. Click on E-mail
 - d. Send a Copy (CC) to yourself at your Cruisingco.com email address
 - e. For subject line:
 - i. Enter Client name
 - ii. Supplier Confirmation number
 - iii. Date of Departure
 - iv. "Invoice/Confirmation of Payment"
 1. (Example: Robinson Journese #310875: 12-10-12 Invoice/Confirmation of Payment)
 - f. For the original Deposit on this Vacation, Click on "Load Template"
 - g. From the drop down menu choose "Invoice/Confirmation of Payment" and click OK
 - h. For all additional trip components, payment, including final payments, you may write your own email to clients, stating that the new invoice is for "Purchased and paid for TravelEx", "Final Payment", "Purchased Excursions", "Added payment to cruise", or other comments.
 - i. You can either click send current OR browse and attach another document you would like to send, then click send current
 - j. When status says sending is "complete" the Ok box will show, click on OK (this may take some time, please be patient)
11. The email to you and your client has been sent at this point. You should click the "close" icon box to finish which will show a message "do you want to create mailers", say yes and select the category the client's activities will be updated showing you send them this email, continue to close the window.
12. Your clients and you will receive a copy of the email. Be sure the client replies and you save their reply email and attach it to the RES Card in Client Base. This is required before documents may be given to the clients for their travel. Since many clients have more than 1 RES Card within their profile, you will need to open your client's profile, find the RES Card, click View. Once you have opened the RES Card, click on Attachments in the menu box, click on the Add box and browse for the saved email reply, click on it, it will appear in the [Browse for Attachment](#) box, in the Description field type Payment Receipt for client's name or other descriptive name and save.
13. Add activities to the reservation from the create activity drop down menus. Further details may be calendared and sent to your Outlook calendar to ensure you complete all booking To Do activities. This reminder system has been enhanced and customized to include options for Disney reservations. This step should replace your old To Do lists and be a great way to track each important step required for all client Vacations.

**** If the passenger names do not show up on your invoice you will need to go back to the Reservation, click Edit and enter the passenger names, make sure to click the box next to the name.**

[Invoice Errors](#)

If you find an error after generating the invoice you may only correct a few fields yourself.

- If the error is an error in travel date, vendor or client name you can go back into the RES card, edit the information, and then reprint the Invoice.



- If the error is in your remarks or trip description, you will need your ASC to delete the invoice. Once she advises you that it is complete, you will need to generate a new Invoice.

If the error is anything else, please send an email to your ASC – subject: Invoice error. Please include the client name, travel date and RES #, your ASC will respond to your email once the invoice has been voided, you will need to wait for the data base to sync before you can attempt to invoice again. **Do not attempt to fix other errors yourself!**

[Additional information/Tips](#)

****ALL reservations must be entered in CB. Reservations with only a credit card hold (i.e. car rentals, certain hotels, transfers, etc.) must be input through the reservation in CB, and generate an invoice with zero dollars. **** If your client is paying in full at time of booking please use final payment as the RES Cycle and complete through step 9, invoice must be generated.

[Changes to existing reservation, final payments and cancellations](#)

It is very important to keep your client's reservations up to date as changes are made.

- **Any changes or extra payments must be made by the agent in Client Base.** Simply follow the steps outlined above for any additional payments (go through the invoice process, invoicing the additional payment only). For example, if the client made an additional payment of \$500, go into the reservation, and invoice \$500. Be sure to send the updated invoice to the client.
- **Cancellations:** Send an email* with the Client Name, RES # along with the change fee form to charge their credit card, confirmation from PayPal that cancel fee was paid or a copy of the client's check.

Please keep in mind that it is the IC's responsibility to verify that all updates are correct.

[Service/cancellation fees](#)

All fees charged to your client's credit card must be processed by the office; please continue to send the change fee form and contact your ASC with the credit card #.

[Reprinting an invoice](#)

To reprint an existing invoice: Pull up the client profile and click View. Choose RES Cards from the menu box. When the RES cards come up, click view for the card you want, then select Invoices from the menu box. You will then have the option to reprint the invoice.

[Group reservations](#)

Enter the cruise line's or supplier's group #

Example: Holland America Cruise group #12345 – enter: 12345

[Tips for choosing a vendor for Disney](#)

- Adventures by Disney – **Adventures by Disney** – select "Tour"
- Walt Disney World – **Walt Disney Travel Co – FL** – select "Tour"
- Disneyland – **Walt Disney Travel Co – CA** – select "Tour"
- Disney room only – **Disney Central Reservations** – select "Hotel"
- Disney Cruise Line – **Disney Cruise Line** – select "Cruise"
- Tickets only – **Disney Tickets** – select "Miscellaneous" and use #'s only-- no letters for the confirmation number.

[Covering for a vacationing agent](#)

If you are covering for a vacationing agent and you make a deposit on a booking please contact your ASC to find out if the client has an existing profile before entering in CB.

If the client has an existing profile, your ASC will *temporarily* change the agent name to you so you can add the new reservation and generate an invoice.

You will need to make a note in the invoice remarks below



** (vacationing agent) is affiliated with.....

** This invoice has been produced by (insert your name) for (insert vacationing agent name).

Let your ASC know when the invoice has been generated. The record will then be changed back to the original agent.



How to import a Disney Cruise Line Reservation with Live Connect

1. Have CB and DTA open. I created the reservation in DTA. Then in CB, create a Res Card with Live Connect:
2. Please keep in mind that DTA is open and I am logged in. Choose Disney Cruise Line as the Vendor; and Sabre Cruises as the Connect To. Make sure you choose Cruise Co as the Branch:
3. From here I select import reservation:
4. Select Import Reservation:
5. And from here I make my adjustments.

How to import a Disney Reservation with Live Connect

(Not a DCL)

1. I have CB and DTA open. I created the reservation in DTA. Then in CB:
2. Please keep in mind that DTA is open and I am logged in. Do not fill out the User name and password info:
3. From here I select import reservation:
4. Select Send Client Date without option:
5. Retrieve Reservation, and then select where your booking is; i.e. WDW, DLR, etc.:
6. I added the confirmation number (which is in the top left corner) and selected continue:
7. Select Import Reservation at the top left corner:
8. And from here I make my adjustments.

How to Create a Sabre Cruises Reservation in Live Connect

1. Retrieve the desired client profile, create a new Res Card and after entering basic Res Card info, launch Live Connect by clicking the Live Connect icon in toolbar. (You can also launch Live Connect from the Profile action gear, or from the Live Connect icon anywhere it is visible on the toolbar.)
2. Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information.
3. Click the *Create New Reservation* button.
4. Select any Profile, Passenger, Branch and Res Card information you want to use to book the reservation and click *Connect* to launch the on-line booking engine.
5. Although you are still in ClientBase, you are now on-line at the Live Connect Provider's booking site running the on-line booking engine through a ClientBase window.
6. Complete the reservation and when the reservation is confirmed, click *Import Reservation* from the confirmation page. All reservation data booked on-line is now located in the reservation fields in ClientBase.

Import Existing Sabre Cruises Res Made Outside of ClientBase

1. Create a new Res Card or open an existing one and launch Live Connect by clicking the Live Connect icon.
2. Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information if not auto populated.
3. Enter the confirmation number for the reservation you want to import and click *Import Existing Reservation*.
4. Depending on the Live Connect Provider, the system either locates the reservation using the confirmation number and automatically imports all reservation details, or takes you to the Live Connect Provider's site for you to use its Retrieve Reservation feature to locate the reservation. Upon displaying the existing reservation, click *Import Reservation* and the reservation details are imported into the ClientBase Res Card.



Create New Polar Reservation in Live Connect

1. Retrieve the desired client profile, create a new Res Card and after entering basic Res Card info, launch Live Connect by clicking the Live Connect icon in toolbar. (You can also launch Live Connect from the Profile action gear, or from the Live Connect icon anywhere it is visible on the toolbar.)
2. Select Princess Cruise Lines as the Vendor and Polar Online from the drop-down menu by Connect To. (You do not need to enter any login information as this is entered at the POLAR Online Web site.)
3. Click the *Create New Reservation* button.
4. Select any Profile, Passenger, Branch and Res Card information you want to use to book the reservation. This data is **NOT** passed to POLAR Online, 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* to launch the on-line booking engine.
5. Although you are still in ClientBase, you are now on-line at the Live Connect Provider's booking site running the on-line booking engine through a ClientBase window.
6. Complete the reservation and when the reservation is confirmed, click *Import Reservation* from the confirmation page. All reservation data booked on-line is now located in the reservation fields in ClientBase.

Import Existing Polar Reservation Made Outside of ClientBase

1. Create a new Res Card or open an existing one and launch Live Connect by clicking the Live Connect icon.
2. Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information if not auto populated.
3. Do not enter a confirmation number for the reservation but browse for the reservation you want to import and click *Import Existing Reservation*.

How to Adjust the Commissions for a Disney Reservation after uploaded in Live Connect

1. View the reservation:
2. Scroll Down to the Charges:
3. Select Itemize:
4. Select and Edit the Main package:
5. Enter in the taxes and Commissions:
6. Select Save and review the accuracy:
7. Scrool to the bottom and change the Print Itemize Option:
8. Change this to Summerize By Passenger:
9. Please ensure that the totals match the reservation in DTA total.- Close the page:
10. Continue to add the rest of the details to your reservation.