

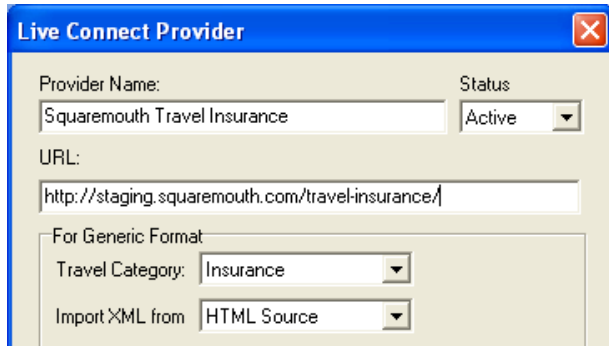
# Squaremouth Travel Insurance

To use Live Connect to purchase trip insurance with Squaremouth Travel Insurance, you must obtain a Travel Partner Number to sell Squaremouth Travel Insurance. If not currently licensed to sell Squaremouth Travel Insurance, contact Squaremouth Travel Insurance directly at 800-240-0369 or sign up on their website at <http://www.squaremouth.com/travel-partner-signup.php>.

## Set Up Squaremouth Travel Insurance

Once you obtain your Affiliate Number, take the following steps to setup ClientBase for Live Connect:

**Step 1)** Since you are setting up Squaremouth Travel Insurance in between ClientBase releases, you need to setup the URL. This is done by going to **Utilities|Live Connect Providers** and clicking *Add*.



The screenshot shows a window titled "Live Connect Provider" with a close button (X) in the top right corner. The window contains the following fields:

- Provider Name:** A text box containing "Squaremouth Travel Insurance".
- Status:** A dropdown menu with "Active" selected.
- URL:** A text box containing "http://staging.squaremouth.com/travel-insurance/".
- For Generic Format:** A section containing:
  - Travel Category:** A dropdown menu with "Insurance" selected.
  - Import XML from:** A dropdown menu with "HTML Source" selected.

**Provider Name:** Enter *Squaremouth Travel Insurance*.

**URL:** Enter <http://www.squaremouth.com/travel-insurance/>

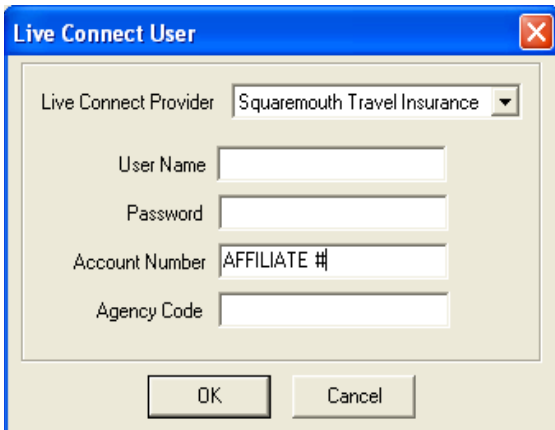
**Travel Category:** Select *Insurance*.

**Import XML from:** Select HTML Source.

**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.

**Set Up Global Agent Login Information:** 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:

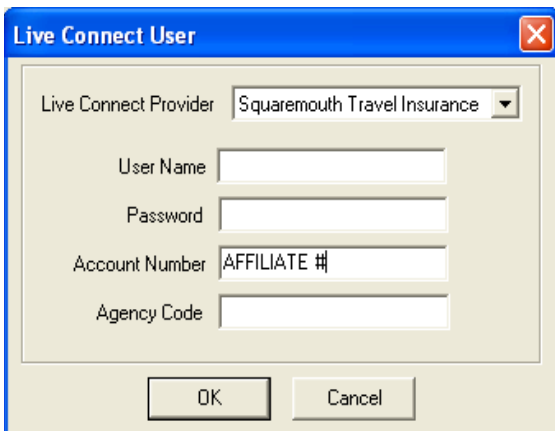


The screenshot shows a dialog box titled "Live Connect User". It has a blue title bar with a close button (X) on the right. The main area is light beige and contains four input fields: "Live Connect Provider" (a dropdown menu showing "Squaremouth Travel Insurance"), "User Name" (an empty text box), "Password" (an empty text box), and "Account Number" (a text box containing "AFFILIATE #"). Below these fields is an "Agency Code" text box, which is empty. At the bottom of the dialog are two buttons: "OK" and "Cancel".

**Live Connect Provider:** Select Squaremouth Travel Insurance from the drop-down list.

**User Name, Password and Account Number:** Leave User Name & Password blank. In *Account Number*, enter your *Affiliate Number* you obtained from Squaremouth Travel Insurance.

**Set Up Individual Agent Login Information:** To set up Live Connect for **each** user login, click 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 Squaremouth Travel Insurance by first clicking the *Live Connect Tab* under *User Settings* and then *Add*. (User can do this for themselves if they have access to **Utilities|MyLogin|Live Connect**.)



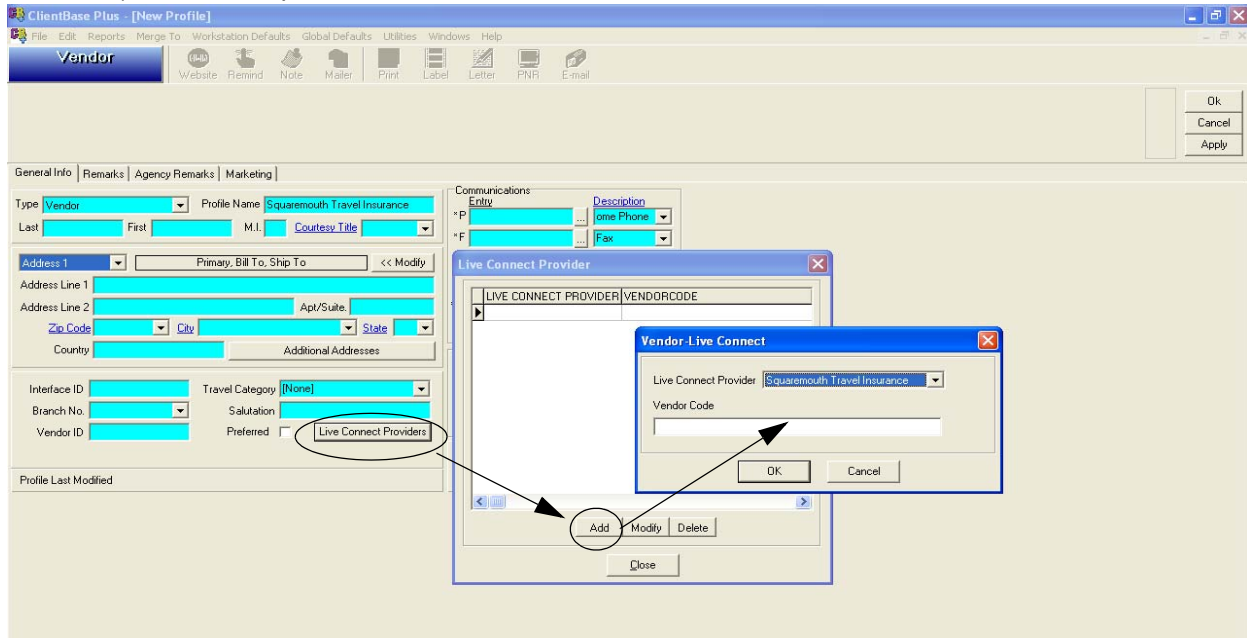
This is an identical copy of the screenshot above, showing the "Live Connect User" dialog box with the same settings: "Live Connect Provider" set to "Squaremouth Travel Insurance", "User Name" and "Password" blank, "Account Number" containing "AFFILIATE #", and "Agency Code" blank.

**Live Connect Provider:** Select Squaremouth Travel Insurance from the drop-down list.

**User Name, Password and Account Number:** Leave User Name & Password blank. In *Account Number*, enter your *Affiliate Number* you obtained from Squaremouth Travel Insurance.

**Step 3)** Create a vendor profile for Squaremouth Travel Insurance. From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select the desired booking engine (Squaremouth Travel

Insurance) from the drop-down list. The vendor code is left blank.



**Step 4)** Set up insurance prompting by going to **Global Defaults|Res Card Insurance Prompting**. (See chapter, *Setting Up ClientBase for Your Agency*.)

## Squaremouth Travel Insurance Features

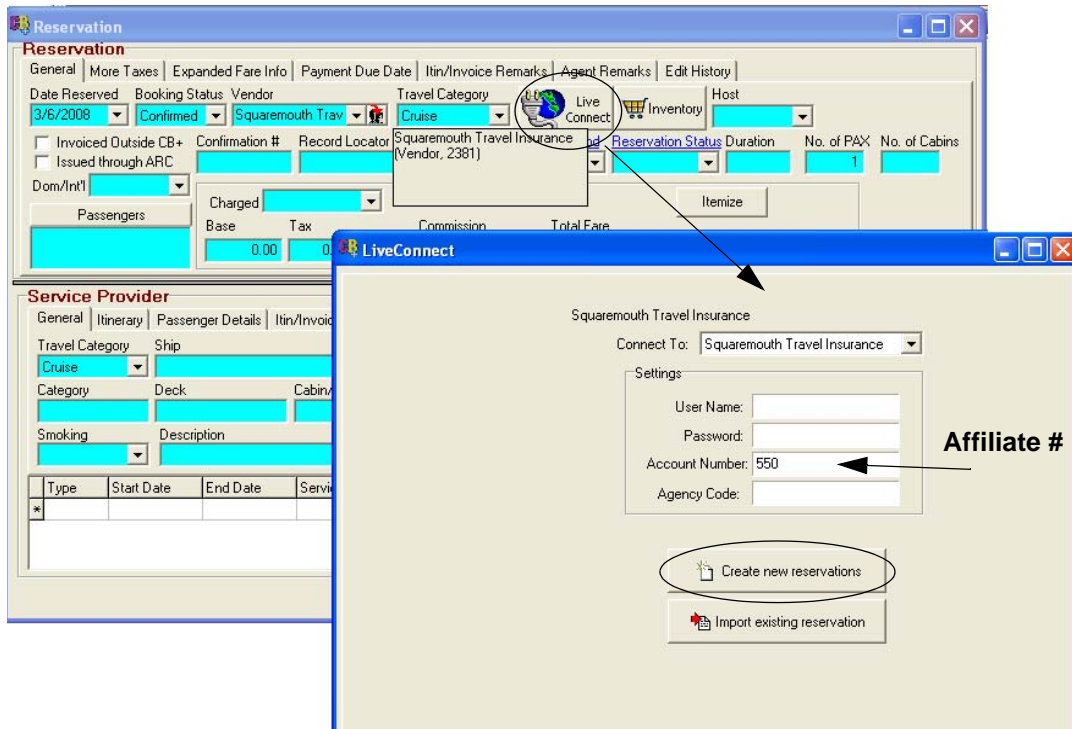
Squaremouth Travel Insurance supports the following Live Connect Features if checked off by ✓:

- ✓ **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 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.

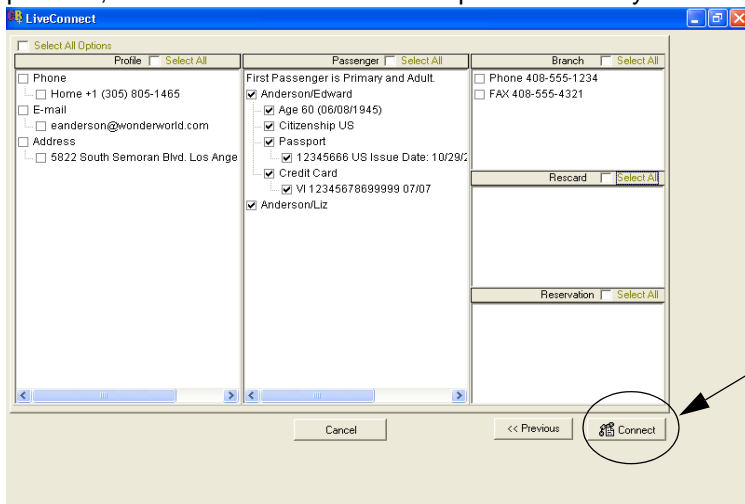
## Create New Squaremouth Travel Insurance Reservation

**Step 1)** When ready to book on-line, create a client's Res Card and fill in the *Agent, Status, Reservation Cycle, and Trip Name* fields and select the passengers. Click the reservation tab and *Add*. Fill in the Travel

Category and Vendor fields, and click *Live Connect* and *Create New Reservations*..



**Step 2)** Select any customer information for use to book the Squaremouth Travel Insurance reservation. This data is automatically passed to Squaremouth Travel Insurance 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, use the CTRL key in combination with clicking. Again, this step is designed to save time during the insurance booking process, as less fields need to be completed manually. Any missing or incomplete data can be updated on the Squaremouth Travel

Insurance website confirming the insurance booking. Click *Connect*.

The screenshot shows the 'LiveConnect' window with a table of reservations and a form for travel information. The 'Connect' button at the bottom right is circled in red.

Type	Vendor	Start Date	End Date	Base	Tax	Deposit Due
Tour	Tunjet Vacations	4/30/2001	5/4/2001	1,070.20	0.00	

Travel Information

Principal Supplier/Tour Operator: Tunjet Vacations  
Destination: United States  
Trip Cost: 1,070.20  
Code: Airfare  
Car Rental Company: Car Rental Company

Departure Date: 4/30/2004  
Return Date: 5/4/2004  
Deposit Date: 1/8/2004  
Final Payment Date: 1/15/2004

Buttons: Cancel, << Previous, **Connect**

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

The screenshot shows the SquareMouth website interface. The 'Import Reservation' button is circled in red.

Live Connect

Profile: Anderson/Edward  
Passengers: Anderson/Liz

Navigation: Back, Forward, Print, Exit, **Import Reservation**

Home Quote Travel Partners Corporate Info Product Info

SquareMouth  
1-800-240-0369

Travel Insurance International Medical Insurance Help & Advice