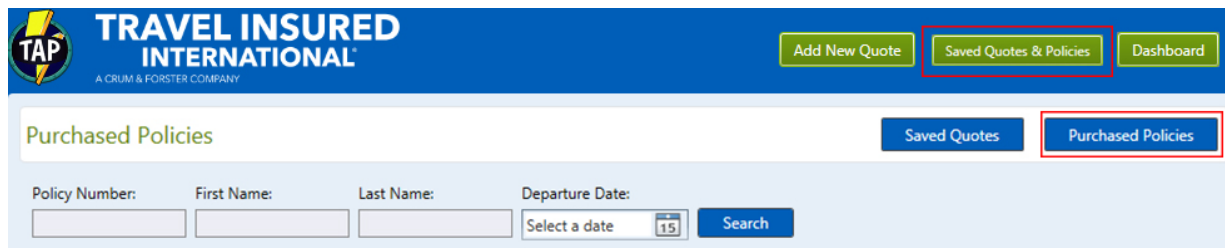




ClientBase Setup

The Travel Insured Agent Portal (TAP) is designed to **export** insurance bookings to your ClientBase Res Card.

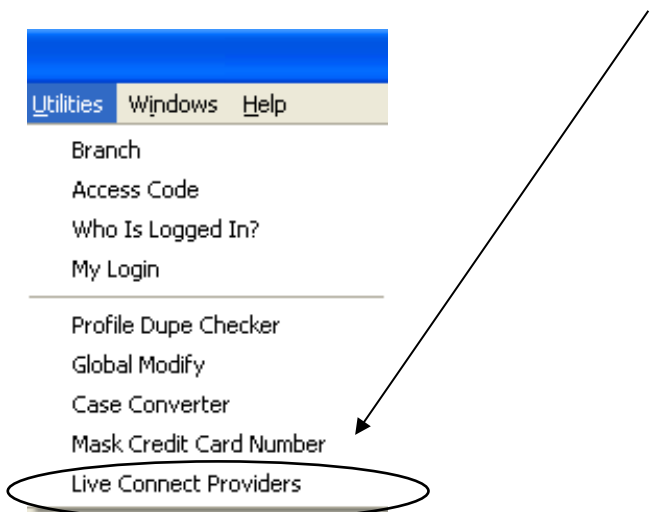
This feature is found in the “**Saved Quotes & Policies**” screen, under “**Purchased Policies**” in TAP.



Complete these 2 steps in ClientBase before you use the TAP export feature. If ClientBase is on Terminal Server, install TAP on the server:

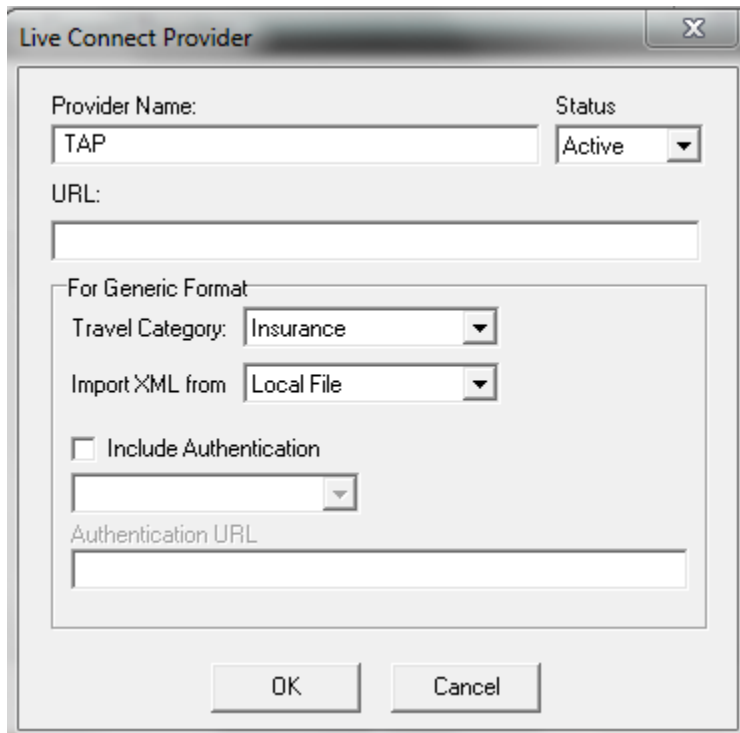
Step #1: Add a Live Connect Provider

In ClientBase, click on *Utilities > Live Connect Providers*:



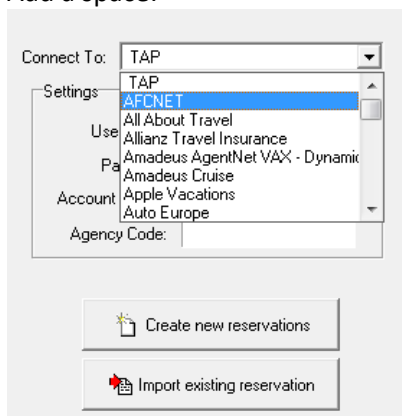
From the Live Connect Providers window, click on **Add**.

Add **TAP** as a Live Connect Provider as shown here, and click **OK** to save.



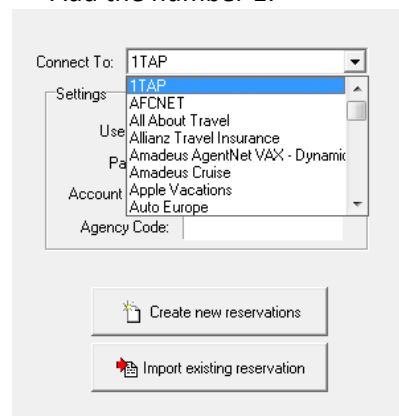
TIP: If you want **TAP** to appear at the top of your list of Live Connect providers, add a space or add the number 1, as shown here:

Add a space:



OR

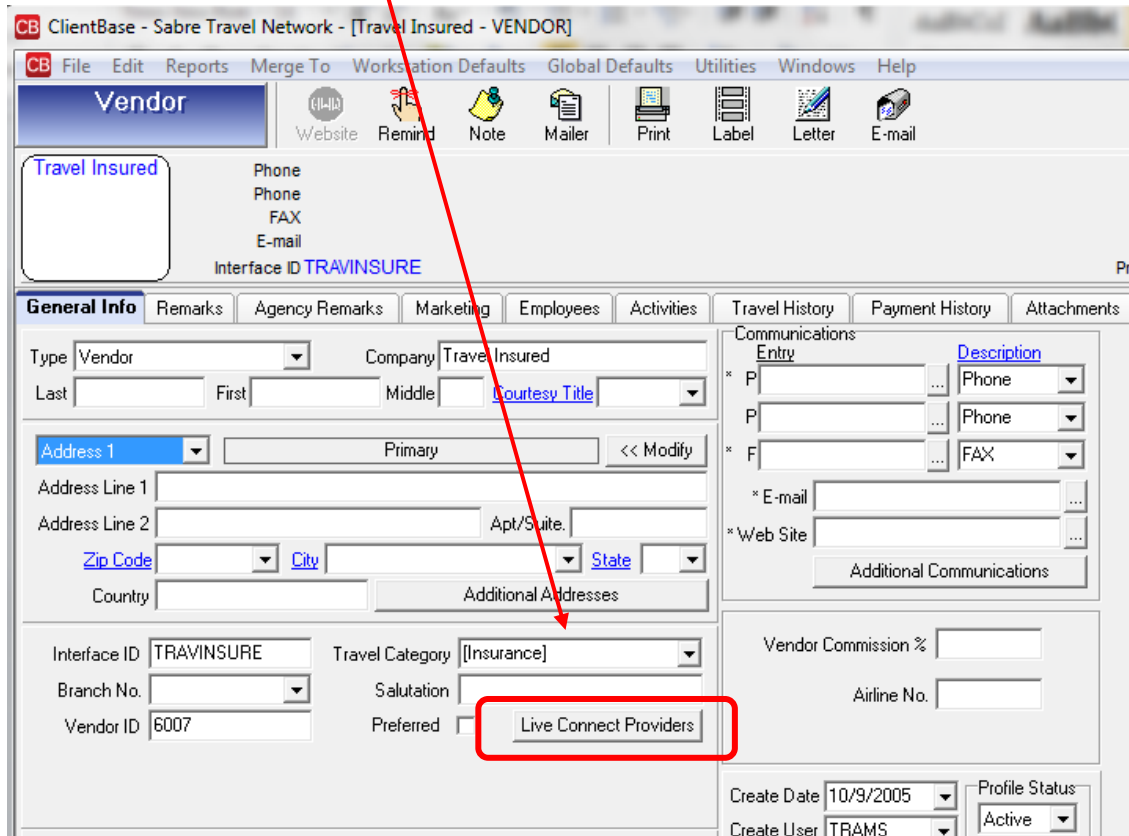
Add the number 1:



Step #2: Link TAP to your Vendor Profile

Locate and display the **Vendor Profile for Travel Insured**.

Click on the *Live Connect Providers* button at the bottom of the profile, and then click on *Add*.



ClientBase - Sabre Travel Network - [Travel Insured - VENDOR]

Vendor: Travel Insured

Interface ID: TRAVINSURE

General Info: Type Vendor, Company Travel Insured

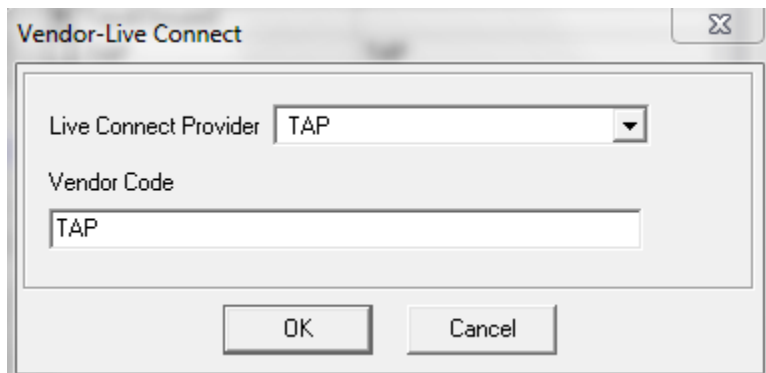
Address 1: Primary

Interface ID: TRAVINSURE, Travel Category: [Insurance]

Vendor ID: 6007

Live Connect Providers

Locate the profile for **TAP** from the drop down list, enter **TAP** into the **Vendor Code** Box, and click **OK**.



Vendor-Live Connect

Live Connect Provider: TAP

Vendor Code: TAP

OK Cancel