



AgentMax Online Technical Introduction and Training

May 2022

Allianz  Partners

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USING AGENTMAX ONLINE

Log in at AgentMaxOnline.com



Feel free to call us—we're here to help.

A screenshot of the AgentMax Online login page. It features a light gray background with a white rounded rectangle containing the login fields. There are two input fields: "Email" and "Password". Below the "Email" field is a checkbox labeled "Remember me". To the right of the "Password" field is a link that says "Forgot Password?". At the bottom of the form are two buttons: a blue "Log In" button and a white "Create New Account" button. Below the form is a light blue banner with the text "Interested in becoming a partner? Click here to find out more." Two arrows point from the form area to the right, one from the "Log In" button and one from the "Create New Account" button.

Log in with your email address and password.

If you've never used AgentMax Online before, click the *Create a New Account* button.

If you have used AgentMax, but not AgentMax Online, you will still need to create an account—just use the same email to ensure your information transfers.



Create a New Account



855-524-3687

Create New Account

To create your new account, please enter your email address, ACCAM Number and then click verify. Once your ACCAM has been verified, click Next to continue.

Email

email@test.com

ACCAM# ⓘ

Get an ACCAM if you need one.

F123456

Verify

Next

To create your new account, enter your email address, ACCAM Number, and click on the *Verify* button.

Your Agency Name will then be displayed, and you'll see a *Next* button.

Click on the *Next* button to receive a verification email. Open the email, and click on the *Verify Your Email* button to create your account.

Your agency Administrator will then approve your account, and you'll be ready to start using this powerful tool.

REBUILD TRAVELER CONFIDENCE

with two new marketing campaigns.

Allianz  Partners

Enabling Notifications

The screenshot shows the AgentMax online interface. At the top left is the AgentMax logo with the tagline "Powered by Allianz Global Assistance". At the top right is a contact number "855-524-3687" and a "Notifications" button with a bell icon. Below the header is a navigation bar with tabs: HOME, ADMINISTRATION (highlighted with a red box), USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and a LOGOUT button. Below the navigation bar is a message: "Customize your personal information and account settings using the options below." Below this message are several tabs: Profile & Preferences (highlighted with a red box), Address & Logo, My Agencies, 2nd Chance by MaxMail, Interface Settings, and Security. The Profile & Preferences tab is active, showing the "Profile" section. The Profile section includes fields for ACCAM#, Email, Agency Name, First Name, Last Name, and Agent ID. To the right of these fields are dropdown menus for Role (Optional), Work Location (Optional), and Business Type (Optional). Below these dropdowns is the "Preferences" section, which contains two radio button options: "Receive copy of confirmation emails?" (with "Yes" selected) and "Turn on notifications?" (with "Yes" selected). A red box highlights the "Turn on notifications?" option, and a red arrow points from this box to the "Notifications" button in the top right corner. A "Finish" button is located at the bottom of the form.

AgentMax
Powered by Allianz Global Assistance

855-524-3687
Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Customize your personal information and account settings using the options below.

Profile & Preferences Address & Logo My Agencies 2nd Chance by MaxMail Interface Settings Security

Profile

ACCAM#

Role (Optional)
Agent

Email

Work Location (Optional)
Unknown

Agency Name

Business Type (Optional)
Unknown

First Name

Preferences

Receive copy of confirmation emails? ☒ Yes ☐ No

Turn on notifications? ☒ Yes ☐ No

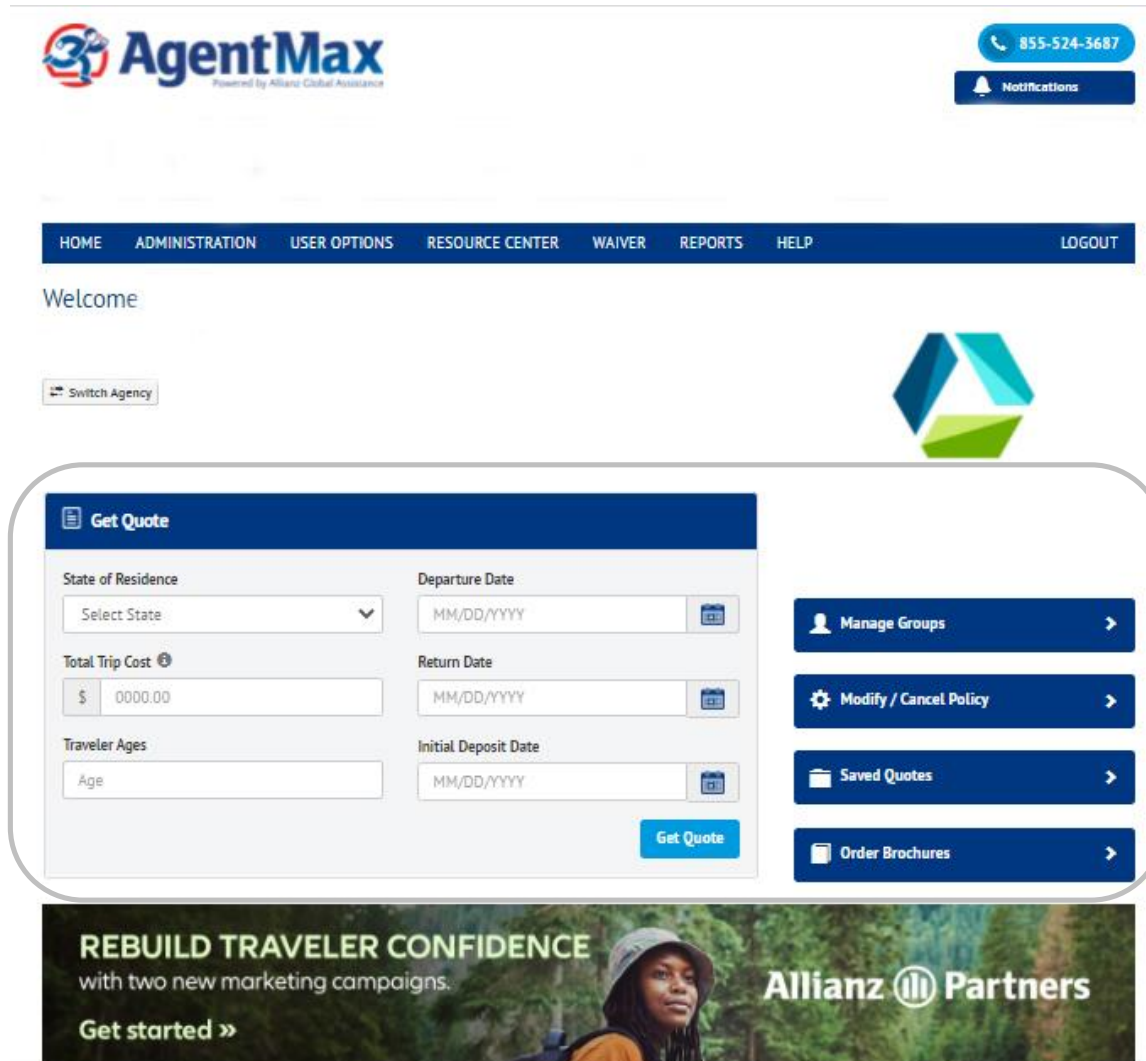
Finish

Agent ID ⓘ

On the Administration tab, check *Receive Copy of Confirmation Emails* to receive copies of actual plan documents your client will receive.

Check the *Notifications* box to be alerted to plans purchased through the email link.

Create a Quote/Purchase



The image shows the AgentMax online interface. At the top left is the AgentMax logo with the tagline "Powered by Allianz Global Assistance". To the right is a contact number "855-524-3687" and a "Notifications" button. Below this is a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and LOGOUT. A "Welcome" message is displayed. A "Switch Agency" button is on the left. In the center is a large blue and green geometric logo. The main content area features a "Get Quote" form with the following fields: "State of Residence" (a dropdown menu), "Departure Date" (a date picker), "Total Trip Cost" (a text input with a dollar sign and "0000.00"), "Return Date" (a date picker), "Traveler Ages" (a text input with "Age" as a placeholder), and "Initial Deposit Date" (a date picker). A blue "Get Quote" button is at the bottom right of the form. To the right of the form are four buttons: "Manage Groups", "Modify / Cancel Policy", "Saved Quotes", and "Order Brochures", each with a right-pointing arrow. At the bottom is a banner for "REBUILD TRAVELER CONFIDENCE" with the text "with two new marketing campaigns." and "Get started »". The Allianz Partners logo is also present in the banner.

Quoting is easy—simply enter the trip information and select *Get Quote*.

Note: Use numbers only—the use of commas or dollar signs may generate an error.

Create a Quote/Purchase continued

Trip Details

State of Residence

TX-Texas

Departure Date

04/02/2022

Total Trip Cost

\$ 2500

Return Date

04/09/2022

Traveler Ages

24

Initial Deposit Date

11/15/2021

Recalculate

Trip Details carry over to this page and can be edited from here if necessary.

View Product Comparison

Products

Price

Classic Plan 2021 Recommended \$111.00

AGENT TIPS

Kids are free PreEx Eligible

Benefits Description

Select product

Click here to compare all products.

Click the product name you wish to sell to see available add-ons and benefit information.

Note: Premium quoted is for all travelers on the plan, but benefits are per person.

To continue, click *Select Product*.

Create a Quote/Purchase continued

AgentMax
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855-524-3687
Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Enter travel information. Please fill in any remaining trip and traveler information.

Product(s) [Edit](#)
Classic Plan 2021 - \$111.00

Trip Information

Departure Date: 04/02/2022
Return Date: 04/09/2022
Initial Deposit Date: 11/15/2021

Total Trip Cost: \$ 2500
Destination: Caribbean - Aruba
Supplier: Delta Air Lines Inc.

View the current list of travel suppliers that are eligible for financial default protection. Your plan may offer this coverage.

It is important you list all of the travel suppliers you are using during your trip. If your supplier is not on the list, select the 'Not Listed' option. It will not impact the other benefits and coverages of the policy. This list only applies to financial default coverage. Please review the pricing and plan details information to determine if your plan includes financial default coverage.

Traveler Information

Primary Traveler Information

First Name: Andrew
Last Name: Arceola
Date Of Birth [Age: 24]: 04/01/1997

If you need to go back and change your product click *Edit*.

Destination and *Supplier* fields are required. Valid options, however, include *Not Listed* and *Unknown*.

Traveler Information appears here.

Create a Quote/Purchase continued

Address 123 Maple Ln Address 2 City Dallas

State Of Residence TX-Texas Zip Code 75019 Phone (804) 555-1212

Email AArcadiaRam@gmail.com

Other Travelers Add Traveler

Fill in traveler information.

Additional Information

Agent ID 12345 Trip ID (Optional)

Your *Agent ID* will be prepopulated.

Flight Information

By providing the appropriate flight information and opting into a communication method below, we/Allianz Global Assistance can monitor and proactively assist customers in case of flight delays including notification of delays that may qualify for trip delay benefits. Consumers must elect to receive these notifications.

Flight Itinerary Information Add Flight

Opt into *MaxMail*, Save and/or *Email* your quote from here. To complete the purchase, scroll down this page to continue.

☐ Opt Into 2nd Chance

Save Quote Email Quote

Create a Quote/Purchase continued

Checkout

Payment Method

☒ Credit Card ☐ Cash Withheld

Total Price : \$111.00

Name on Card

Credit Card Number

Expiration Date

Anthony Arcadia

XXXX XXXX XXXXX XXXX

8 2022

☒ Click here if the credit card address is the same as the mailing address

Confirmation Method

Customer has elected to receive all notices and documents, including travel notifications, by:

☒ Email

Primary Email Address

Secondary Email Address

margaret.minor@allianz.com

agent@travelagency.com

☐ US Mail


Complete Purchase

☒ Customer has agreed to the [Purchase Terms and Disclosures](#)

☒ Customer has agreed to the [Plan and Pricing Details](#) for Classic Plan 2021.

Once you select PURCHASE, you will be charged **\$111.00**

PURCHASE

 Our promise to you

If your customer is not completely satisfied, they have 15 days (or more, depending on state of residence) to request a refund, provided they haven't started their trip or initiated a claim. Premiums are non-refundable after this period.

Select how you want the confirmation documents sent to your customer.

Be sure to check the boxes for the *Purchase Agreement* and *Certificate of Insurance* before clicking *Purchase*. These boxes must be checked.

Note: *Plan and Pricing Details* are included in the *Certificate of Insurance* if your client wishes to review them.

Create a Quote/Purchase complete

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855-524-3687

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

< Policy Confirmation

View / Print Send E-mail

Policy Details E2239486749 - Classic Plan 2021	Purchase Date 1/6/2022	Trip dates 04/02/2022-04/09/2022
Payment Type Customer Credit Card	Card Number XXXX-XXXX-XXXX-2816	Confirmation Method Email
Insureds Anthony Arcadia	Total Price \$111.00	Email Address margaret.minor@allianz.com

Flight Itinerary Information

Flight Date 04/02/2022 00:00:00	Airline Delta Air Lines	Flight Number 123	Departure Airport Dallas/Fort Worth International Airport(DFW)
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Flight Delay Alerts Communication Method

Communication Method Opted-Out	Email Address	Cell Phone 8045551212
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After you're done, click on either of these options to return to the *Home* page.

Access a copy of the *Purchase Receipt* for your records.

USING AGENTMAX ONLINE

Self-Service

AgentMax
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855-524-3687

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

☒ My Bookings ☐ All Bookings

Sort by: Departure Date ☒ Newest ☐ Oldest Refresh

Quotes Pending Confirmed Group Travel

Arcadia, Anthony -					
Saved: 12/31/2021	Departure: 04/02/2022	Price: \$111.00	MaxMail: Opted In	PNR:	AgentID: MWM
Test, Margaret -					
Saved: 10/15/2021	Departure: 03/08/2022	Price: \$154.00	MaxMail: 1st E-mail Sent	PNR:	AgentID: MWM
Minor, Margaret -					
Saved: 08/31/2021	Departure: 02/28/2022	Price: \$553.00	MaxMail:	PNR:	AgentID: MWM

Use the options in this drop-down menu to sort the history.

Use these tabs to access all saved *Quotes* and confirmed *Policies*. Note—the *Pending* tab is for credit card rejections.

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Self-Service

The screenshot displays the AgentMax Self-Service interface. At the top, the AgentMax logo is on the left, and a contact number 855-524-3687 is on the right. Below the logo is a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and LOGOUT. Underneath the navigation bar is a filter section with radio buttons for 'My Bookings' (selected) and 'All Bookings', a 'Sort by:' dropdown set to 'Departure Date', and radio buttons for 'Newest' (selected) and 'Oldest'. A 'Refresh' button is also present. The main content area shows a table of bookings under the 'Confirmed' tab. The first booking is for 'Minor, Margaret' with a dropdown menu open, showing options: View, Modify, Cancel, Print, Email, and Copy to Quote. The second booking is for 'Test, Margaret' with a dropdown menu open, showing options: View, Modify, Cancel, Print, Email, and Copy to Quote. The third booking is for 'Confirmation #: E2218719753' with a dropdown menu open, showing options: View, Modify, Cancel, Print, Email, and Copy to Quote. The table columns are: Name, Status, Purchased, PNR, Departure, and AgentID.

Name	Status	Purchased	PNR	Departure	AgentID
Minor, Margaret	Confirmed	10/21/2021		02/01/2024	MWM
Test, Margaret	Confirmed	10/21/2021		02/01/2024	MWM
Confirmation #: E2218719753	Confirmed	09/21/2021		01/01/2023	MWM

Simply clicking on the customer's name will open the options menu. From here you can *Modify/Cancel* a policy, *Print the Purchase Receipt* and more.

USING AGENTMAX ONLINE Self-Service



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Welcome, James!

PARTNER DIRECT SALES
ACCAM F204515

Switch Agency



Get Quote

State of Residence Select State ▼	Departure Date MM/DD/YYYY
Total Trip Cost \$ 0000.00	Return Date MM/DD/YYYY
Traveler Ages Age	Initial Deposit Date MM/DD/YYYY

Get Quote

Manage Groups

Modify / Cancel Policy

Saved Quotes

Order Brochures

Need to *Modify* or *Cancel* a policy? Or want to access a *Saved Quote*? Click on the appropriate button.

USING AGENTMAX ONLINE Self-Service



855-524-3687

Notifications

HOME ADMINISTRATION **USER OPTIONS** RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Welcome, James!

PARTNER DIRECT SALES
ACCAM F204515

Switch Agency



Get Quote

State of Residence Select State ▼	Departure Date MM/DD/YYYY
Total Trip Cost \$ 0000.00	Return Date MM/DD/YYYY
Traveler Ages Age	Initial Deposit Date MM/DD/YYYY

Get Quote

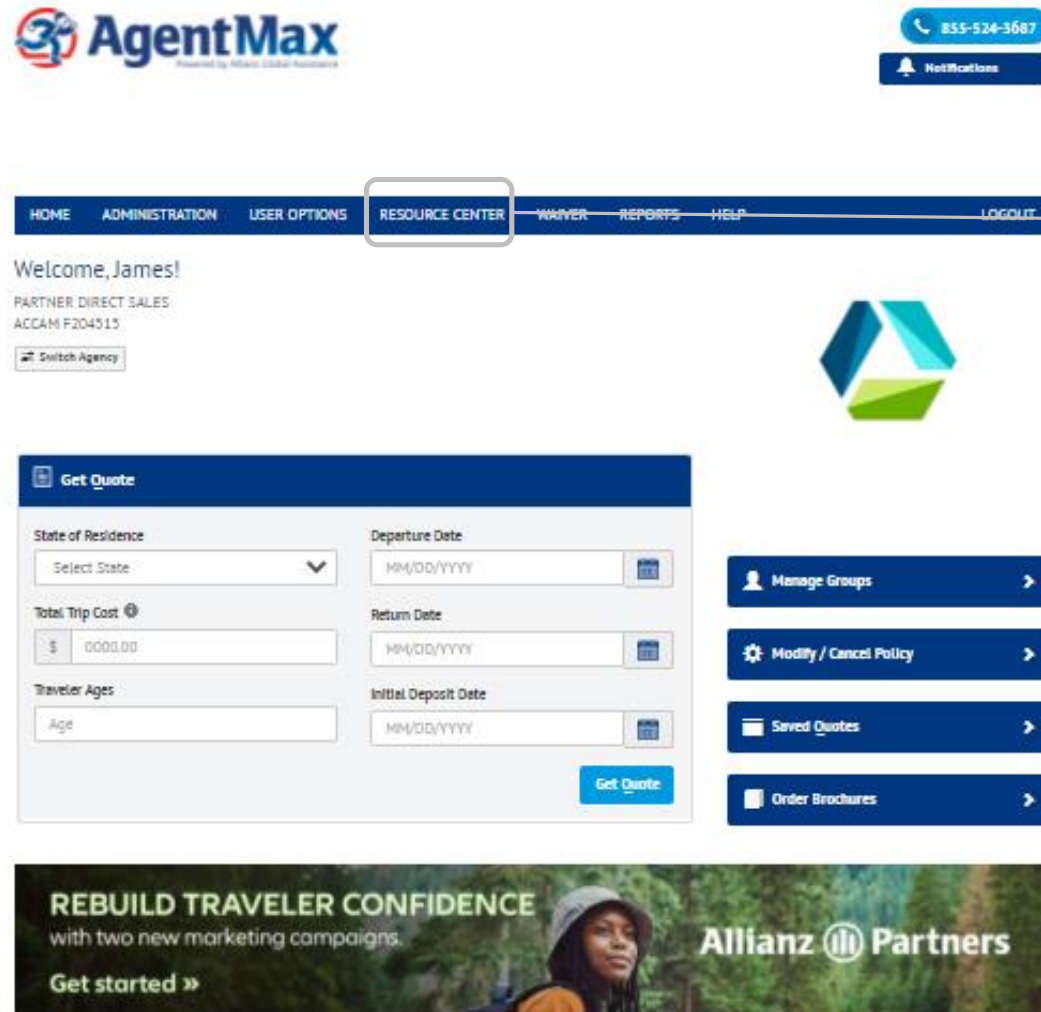
- Manage Groups >
- Modify / Cancel Policy >
- Saved Quotes >
- Order Brochures >**

From *User Options*, you can upload your logo, customize *MaxMail* settings and reset your password.

If a customer declines insurance, be sure to have them sign a waiver.

Order Brochures from here.

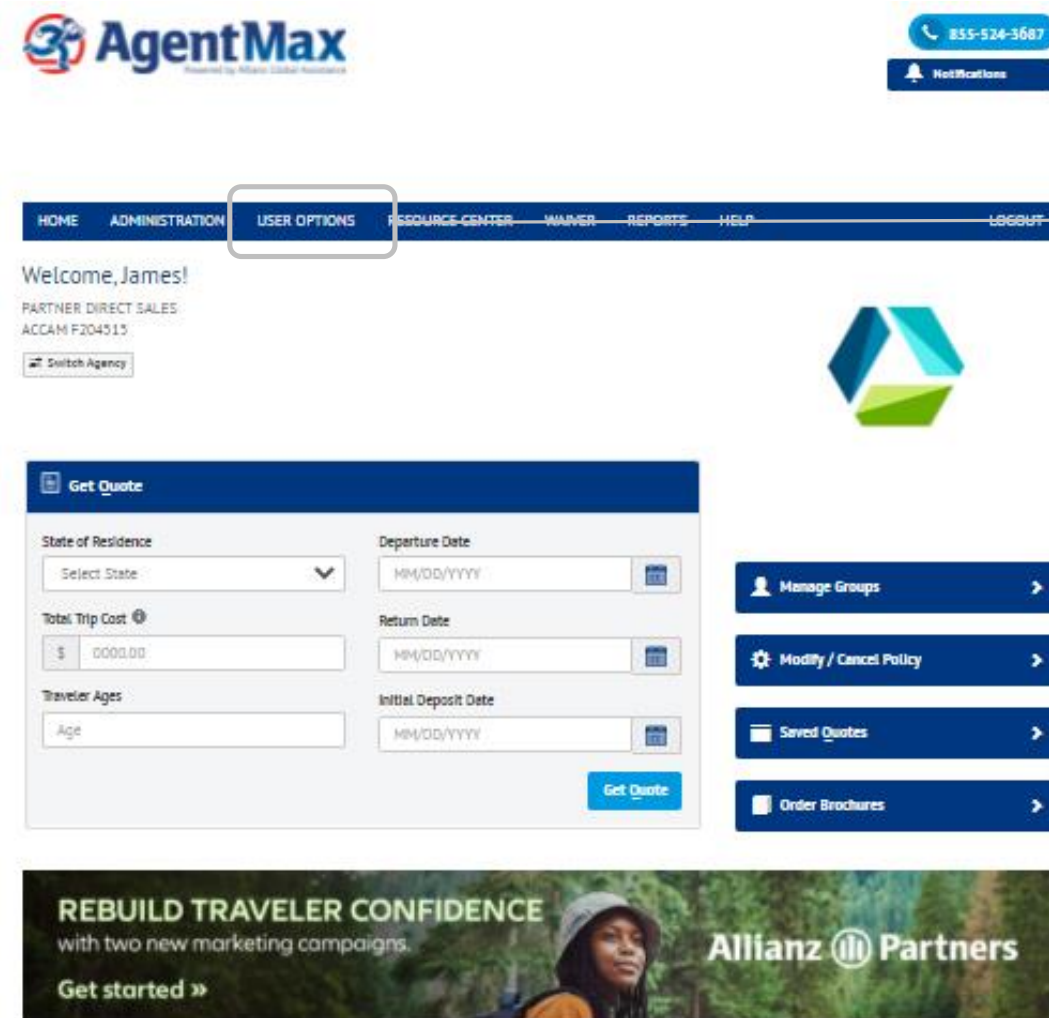
News and Resources



The image shows the AgentMax online interface. At the top left is the AgentMax logo with the tagline "Powered by Allianz Global Assistance". To the right is a phone icon with the number 855-524-3687 and a Notifications bell icon. Below this is a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS, RESOURCE CENTER (highlighted with a white box), WAIVER, REPORTS, HELP, and LOGOUT. Below the navigation bar, it says "Welcome, James!" and "PARTNER DIRECT SALES ACCAM F204515" with a "Switch Agency" button. In the center is a large hexagonal logo composed of several colored triangles. Below this is a "Get Quote" form with fields for State of Residence (a dropdown menu), Total Trip Cost (a text box with a dollar sign and "0000.00"), Traveler Ages (a text box with "Age"), Departure Date (a date picker), Return Date (a date picker), and Initial Deposit Date (a date picker). A "Get Quote" button is at the bottom right of the form. To the right of the form are four buttons: "Manage Groups", "Modify / Cancel Policy", "Saved Quotes", and "Order Brochures", each with a right-pointing arrow. At the bottom is a banner for "REBUILD TRAVELER CONFIDENCE" with the text "with two new marketing campaigns." and "Get started »", featuring a woman's face and the Allianz Partners logo.

The *Resource Center* is your one-stop shop for training materials, articles, and marketing resources. You can even access *Alerts*.

Second-Chance by MaxMail



The image shows the AgentMax online interface. At the top, there's a header with the AgentMax logo, a phone number (855-524-3687), and a Notifications bell icon. Below the header is a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS (highlighted with a red box), RESOURCE CENTER, WAIVER, REPORTS, HELP, and LOGOUT. A grey arrow points from the USER OPTIONS link to the text on the right. Below the navigation bar, there's a welcome message: "Welcome, James!" followed by "PARTNER DIRECT SALES" and "ACCUM F204515". There's a "Switch Agency" button. In the center, there's a large green hexagonal logo. Below this, there's a "Get Quote" form with fields for State of Residence (a dropdown menu), Total Trip Cost (a text box with a dollar sign), Traveler Ages (a text box), Departure Date (a date picker), Return Date (a date picker), and Initial Deposit Date (a date picker). There's a "Get Quote" button at the bottom right of the form. To the right of the form, there are four buttons: "Manage Groups", "Modify / Cancel Policy", "Saved Quotes", and "Order Brochures", each with a right-pointing arrow. At the bottom, there's a banner for "REBUILD TRAVELER CONFIDENCE" with the text "with two new marketing campaigns." and "Get started »". The Allianz Partners logo is also visible in the banner.

Click on *User Options* to get started, and then click on the *MaxMail* tab to set up easy-to-send, second-chance selling offers automatically to your customers.

Each *2nd Chance by MaxMail* offer includes a personalized, co-branded offer with a link for the customer to complete the sale.

When customers purchase, the sales show up in your sales history, and you get full credit for the sale.

Second-Chance by MaxMail, continued

AgentMax
Powered by Allianz Global Assistance

855-524-3687
Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Customize your personal information and account settings using the options below.

Profile & Preferences Address & Logo My Agencies **2nd Chance by MaxMail** Interface Settings Security

Your AgentMax Administrator can set default MaxMail Settings for all agents.

2nd Chance by Maxmail is a free way to market the travel insurance if your initial offer fails to result in a sale. This program automatically sends co-branded offers to your consumer for them to complete the sale on their own while you earn full commission. Create your own customized second chance marketing plan from the options below. Select between 1 and 4 offers and choose the product for each.

Global Options

☐ Automatically Opt all Quotes Into 2nd Chance by MaxMail

Offer Control

<input checked="" type="checkbox"/> 7 days after opt-in date	Product In Quote
<input type="checkbox"/> 30 days prior to departure	
<input checked="" type="checkbox"/> 10 days prior to departure	Essential Plan
<input checked="" type="checkbox"/> 5 days prior to departure	Basic Plan (NY)

Update

Check this box so all quotes get opted into the program automatically.

Choose how many offers will be sent and which product will be included.

Now anytime you create and save a quote, it will be opted into the program.

QuoteMax enables online sales

The screenshot shows the AgentMax online interface. At the top is the AgentMax logo with the tagline 'Powered by Allianz Global Assistance' and a contact number 855-524-3687. Below the logo is a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS, NEWS & RESOURCES, WAIVER, REPORTS, HELP, and LOGOUT. The 'ADMINISTRATION' link is highlighted. Below the navigation bar is a section titled 'ONLINE DIRECT SALES' with a back arrow icon. Under this section is a sub-header 'Customize your personal information and account settings using the options below.' Below this is a tabbed interface with 'General' and 'QuoteMax' tabs. The 'QuoteMax' tab is selected. The 'QuoteMax' tab contains two sections: 'Agency Information' and 'Agency Settings'. The 'Agency Information' section has fields for Address, ACCAM #, Group Number, and Short Branch Name. The 'Agency Settings' section has a reminder and three checkboxes: 'Enable Recommendation Engine', 'Allow QuoteMax', and 'Enable Agent Product Tips'. An 'Apply' button is at the bottom of the 'Agency Settings' section. Arrows point from the 'QuoteMax' tab and the 'Allow QuoteMax' checkbox to the text on the right.

AgentMax
Powered by Allianz Global Assistance

855-524-3687

HOME ADMINISTRATION USER OPTIONS NEWS & RESOURCES WAIVER REPORTS HELP LOGOUT

< ONLINE DIRECT SALES

Customize your personal information and account settings using the options below.

General QuoteMax

Agency Information

Address ALLIANZ GLOBAL ASSISTANCE
9950 Mayland Dr
Richmond, VA 23233
800.284.8300

ACCAM # F025212

Group Number

Short Branch Name F025212 UAT

Agency Settings

Important reminder: Any change will apply to every account in the agency.

☒ Enable Recommendation Engine

☒ Allow QuoteMax

☒ Enable Agent Product Tips

Apply

To add a travel insurance purchase “*widget*” to your website, configure a few options, and then add the code that we provide to your site.

Customers can then buy directly from your site while you get credit for the sale.

If you are an *Administrator*, log in and click here.

Select the *QuoteMax* tab to get started.

QuoteMax enables online sales

The screenshot shows the AgentMax QuoteMax configuration page. At the top, there's a navigation bar with links: HOME, ADMINISTRATION, USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and a LOGOUT button. A phone icon with the number 855-524-3687 is also present. Below the navigation bar, the page title is 'ACCESS AMERICA IVR/INTERNET TEST ACCT'. A sub-header says 'Customize your personal information and account settings using the options below.' There are three tabs: General, Interface Settings, and QuoteMax (which is selected). Under the QuoteMax tab, there's a 'Customize' section with the instruction 'Create a QuoteMax box that best fits with the look and feel of your website.' Below this, there's a 'Please Select' section with a 'Web Version' dropdown menu. A 'Multiple Products' section has radio buttons for 'Yes' and 'No', with 'No' selected. A 'Default Product' section has a dropdown menu with 'Use Recommendation Engine' selected. There's a 'Picture' section with two image thumbnails and a 'No Image' option. Below the images is a 'Layout' section with two layout options. On the right side, there's an 'Agent Code' section with a dropdown menu showing 'Default Agent Code (QMax)' and a 'Create' button. Below this is a code block containing an iframe code snippet. At the bottom of the code block are 'Copy to Clipboard' and 'Email Code' buttons. Arrows point from the text boxes on the right to specific elements in the interface: the first arrow points to the 'Agent Code' dropdown, the second arrow points to the code block, and the third arrow points to the 'Picture' section.

AgentMax
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855-524-3687

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

< ACCESS AMERICA IVR/INTERNET TEST ACCT

Customize your personal information and account settings using the options below.

General Interface Settings **QuoteMax**

Customize
Create a QuoteMax box that best fits with the look and feel of your website.

Please Select



Web Version

Multiple Products ☐ Yes ☒ No

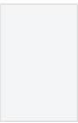
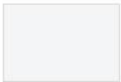
Default Product

Use Recommendation Engine

Picture

☒  ☐  ☐ No Image

Layout

☒  ☐ 

Agent Code ⁱ

Default Agent Code (QMax)

Create

Copy and paste the code into your website's html to start using QuoteMax today.

```
<iframe frameborder="0" width=300
height=675
src="https://uatbeta.agentmaxonline.com/agentmaxweb/widgets/quot
etool.html?
widgetid=33737&accam=F022884&code=ABIYU4TLWGBGTNHC6ZWL
RSKAR65GB6C5JLBJOIXR7QY3M6I5HDDFVE4FZSITHYW76RUWH3ZVST
QXWGNKUGKMAQ7R34K0XNUR6WSFFCTNMFDEYSPYWRDMPZC
JL3U"></iframe>
```

Copy to Clipboard Email Code

First select *multi* or *single* product. You can specify the default product, or the recommendation engine can handle product selection.

Agent Code can be specified to give credit for the *QuoteMax* sale

We offer two simple ways to copy the code needed to add *QuoteMax* to an advisor site.

Both landscape and portrait backgrounds are available.

QuoteMax example

Allianz Travel Insurance

Affordable and convenient travel insurance in case of cancellation or interruption.

 Get Insurance Quote

Worry less about the unexpected.

State Of Residence

Select State ▼

Total Trip Cost

\$

☒ Age ☐ Date of Birth ☐

Departure Date

MM/DD/YYYY



Return Date

MM/DD/YYYY



Initial Deposit Date

MM/DD/YYYY



Get Quote

Solo Travel Portal

Resources and links for women traveling alone.

United Bicycle Institute

Offers great multi-day classes in bicycle repair and maintenance.

Bicycle Trader

Good source for buying and selling bicycles.

The Outspoken Cyclist

Fascinating weekly podcast about bicycling and the bike industry.

Chainspirations

Beautiful affordable jewelry made from recycled bicycle chains. Proceeds benefit organizations promoting healthy living.

SheRide Mountain Bike Camp

men only mountain bike camps in Colorado.

QuoteMax Link version

The screenshot shows the AgentMax Administration interface. At the top, there's a navigation bar with links: HOME, ADMINISTRATION (highlighted), USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and LOGOUT. A phone icon with the number 855-524-3687 is also present. Below the navigation bar, the page title is 'ACCESS AMERICA IVR/INTERNET TEST ACCT'. A sub-header says 'Customize your personal information and account settings using the options below.' There are three tabs: General, Interface Settings, and QuoteMax (selected). Under the QuoteMax tab, there's a 'Customize' section with the instruction 'Create a QuoteMax box that best fits with the look and feel of your website.' and a blue 'Create' button. Below this, there are two dropdown menus: 'Please Select' with 'Email Version' selected, and 'Agent Code' with 'Default Agent Code (QMax)' selected. Arrows from the text on the right point to the 'ADMINISTRATION' tab, the 'Email Version' dropdown, the 'Agent Code' dropdown, and the 'Create' button.

A full-size quote widget may not be ideal in all circumstances, so we offer a link version, too.

Configure a few options, and then we, provide a link for you to insert in an email.

The link will take your customer to a co-branded form to receive a quote and complete the sale.

Click here to navigate back to *Administration* and *QuoteMax* tabs.

Choose *email* version.

Agent Code must be specified to receive sales credit. After you make both selections, click the blue *Create* button.

QuoteMax Link version continued

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HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

ACCESS AMERICA IVR/INTERNET TEST ACCT

Customize your personal information and account settings using the options below.

General Interface Settings **QuoteMax**

Customize

Create a QuoteMax box that best fits with the look and feel of your website.

Please Select

Email Version

Agent Code **GEETHA**

Create

Copy and paste the code into your website's html to start using QuoteMax today

```
http://uatbeta.agentmaxonline.com/agentmaxweb/storefront/index.html#  
/home/?  
emaillinkcode=ABIYU4TLWGBGTNHC6ZWLRSKAR7AIBWE33AAW7OYIPBP  
WYZZAHMNM2GG3UBZQQCDNYUQLEDDFPWJGF4XSI3AAOKXKGMSDLTDE  
AJCSLMA%3d
```

Copy to Clipboard Email Code

There are two simple ways to copy the code needed to put QuoteMax on an agency site.

Reporting



855-524-3687

HOME ADMINISTRATION USER OPTIONS NEWS & RESOURCES WAIVER **REPORTS** HELP LOGOUT

Get the information you need in real time.

Report Type

- ☒ Summarized Sales Report (PDF)
- ☐ Unsummarized Sales Data (Excel)
- ☐ Group Travel Report (PDF)

Purchase Queue Criteria

- ☒ Myself
- ☐ Other Agent
- ☐ My Agency
- ☐ Other Agency
- ☐ All agencies

Date Range

- ☒ Year To Date
- ☐ Yearly
- ☐ Monthly
- ☐ Quarterly
- ☐ Custom

Options

- ☒ Show Detail Lines
- ☒ Show Product Summaries
- ☐ Show MaxMail Product Summaries

View/Print Report

Email Report

Specialized reports and analysis by report type, purchase queue, and date are available.

You can see all your sales—no matter what the source.

Account migration Quick Start Guide Review



The screenshot shows the AgentMax login interface. At the top, there's a header with the AgentMax logo and a phone icon with the number 855-524-3687. Below the header, there are two input fields: 'Email' with the value 'gleeraj@gmail.com' and 'Password' with masked characters. Below the password field, there's a checkbox for 'Remember me' and a link for 'Forgot Password?'. A red message box in the center says: 'Welcome partner.allianztravelinsurance.com user. You will receive an email to the email address provided above. Please follow those instructions to finish setting up your AgentMax Online account.' At the bottom, there are two buttons: 'Log In' (highlighted in blue) and 'Create New Account'. Below the login form, there's a light blue banner that says: 'Interested in becoming a partner? Click here to find out more.'

Putting the power of AgentMax Online to work is easy. Just follow these simple steps

1. Visit ***agentmaxonline.com***, and click on *Create New Account*.
2. Enter and verify your email address; use the same email address you've been using to ensure your sales history transfers.
3. Enter your agency ACCAM#-- an alphanumeric sequence of a single letter followed by six numbers; then click *Next*.
4. Look for a confirmation email from ***agency services@allianzassistance.com***.
5. Click *Verify* from within that email, and you're logged in and ready to go.


Customer Storefront Sales

Mouse cursor icon

Become a partner | Agent Sign-in

855-524-3687

HOME FIND A PLAN MANAGE A POLICY CLAIMS COVERAGE ALERTS HELP CONTACT US



Get Quote

State Of Residence

Total Trip Cost
\$

Destination

Departure Date
MM/DD/YYYY

Return Date
MM/DD/YYYY

Initial Deposit Date
MM/DD/YYYY

Agency ID (Optional)

☒ Age ☐ Date of Birth

Get Quote



Our promise to you

If you're not completely satisfied, you have 15 days (or more, depending on your state of residence) to request a refund, provided you haven't started your trip or initiated a claim. Premiums are non-refundable after this period.



Award-Winning Service

We are proud to provide our customers with world-class service. Allianz has been honored with five Magellan Awards - Travel Weekly Magazine's premier award for the travel industry.

Your customer will enter trip information and select the *GetQuote* button.

Remind your customer to include your *ACCAM* here.

Customer Storefront Sales, continued

The screenshot displays the AgentMax online storefront. At the top, there are links for "Become a partner" and "Agent Sign-In", along with a phone number "855-524-3687". Below this is a navigation bar with links: "HOME", "FIND A PLAN", "MANAGE A POLICY", "CLAIMS", "COVERAGE ALERTS", "HELP", and "CONTACT US". A banner image shows a coastal town with blue domes. Below the banner, a message states: "Thanks for telling us about yourself and your trip. We've used this information to find the travel insurance plan that best fits your needs. For your convenience, you can find a brief description of this plan and your other travel insurance options below." A "Trip Details" button is visible. Below that is a "View Product Comparison" button. The main section is titled "Products" and "Price". It lists a "Classic Plan 202" with a "Recommended" badge and a price of "\$209.00". A "Select product" button is next to it. Below the product list, a table shows the benefits and coverage for the selected plan.

Benefit	Coverage
Trip Cancellation	\$1,100.00
Trip Interruption	\$1,250.00
Change Fee Coverage	\$500.00
Loyalty Program Redeposit Fee Coverage	\$500.00
Travel/Trip Delay Coverage	\$800.00
Baggage Coverage	\$1,000.00
Baggage Delay Coverage	\$500.00
Emergency Transportation	\$100,000.00
Emergency Medical/Dental Coverage	\$10,000.00

Based on the information entered by the customer, the right product will be recommended.

Your customer can then select a product of their choice.

Customer Storefront Sales, continued

Become a partner | Agent Sign-In
855-524-3687

HOME FIND A PLAN MANAGE A POLICY CLAIMS COVERAGE ALERTS HELP CONTACT US

Enter travel information. Please fill in any remaining trip and traveler information.

Product(s) Edit
Classic Plan 2021 : \$209.00

Trip Information

Departure Date: 05/02/2022
Return Date: 05/09/2022
Initial Deposit Date: 12/31/2021

Total Trip Cost: \$ 3500
Destination: Europe - Italy

Suppliers: Tauck Tours

View the current list of travel suppliers that are eligible for financial default protection. Your plan may offer this coverage.

It is important you list all of the travel suppliers you are using during your trip. If your supplier is not on the list, select the 'Not Listed' option. It will not impact the other benefits and coverages of the policy. This list only applies to financial default coverage. Please review the pricing and plan details information to determine if your plan includes financial default coverage.

Traveler Information

Primary Traveler Information

First Name: Janet
Last Name: Smith
Date Of Birth [Age: 53]: 04/23/1968

Address: 436 Running Springs Way
Address 2:
City: Midlothian

State Of Residence: VA-Virginia
Zip Code:
Phone: (703) 555-1212

E-mail: janetemesid1968@gmail.com

Other Travelers: Add Traveler

Your customer will then add
Supplier(s) ...

and complete *Traveler
Information.*

Customer Storefront Sales, continued

The screenshot shows a checkout form with the following sections:

- Payment Method:** Credit Card (selected), with a "Verified Secure" badge.
- Total Price:** \$209.00
- Payment Information:** Fields for Name on card (Janet Smith), Credit Card Number (1251234567), and Expiration Date (9/2023).
- Confirmation Method:** Email (selected).
- Email Address:** Primary Email Address (janetemerald1968@email.com) and Secondary Email Address.
- Complete Purchase:** Two checkboxes for agreeing to terms and pricing, followed by a "PURCHASE" button.
- Footer:** "Our promise to you" and a refund policy statement.

Annotations on the form:

- A box around the "Email Quote" button at the top right.
- A box around the payment information fields (Name, Card Number, Expiration Date).
- A box around the "Complete Purchase" section, including the checkboxes and the "PURCHASE" button.

Customers will be able to email themselves a quote with an option to buy later.

Customers then enter their *payment information* and how they want the confirmation documents sent

Lastly, they check the boxes for the *Purchase Agreement* and *Certificate of Insurance* before clicking the blue button for *Purchase*.

FAQs

Does AgentMax Online connect to my agency's booking platform?

Yes, AgentMaxOnline connects to Apollo, Sabre ClientBase and ClientBase Plus.

How does the product recommendation feature work?

Based on customers' trip details, this feature provides specific product recommendations for quotes to either agents via AgentMax Online or to customers directly via QuoteMax.

How do I purchase the Professional Travel Program?

The Professional Travel Program is available on AgentMax Online. Simply create a quote as normal, and check the bottom of the product list to locate and select the Professional Travel Program.

When will AgentMax be retired and AgentMax Online become the exclusive version available to users?

AgentMax will be retired at the beginning of July 2022, and AgentMax Online will become the sole version available. We encourage you to make this transition at your earliest opportunity.

Can I only access AgentMax Online from my work computer?

Because AgentMax Online is web-based, you can access your account from virtually any web-enabled device, like your laptop, smartphone, and tablet—allowing you to keep selling while outside your workspace.

FAQs

How do I set up new agents on AgentMax Online who were never on the original version of AgentMax?

Agents can create their own new account by following the same five steps used to migrate from the original version of AgentMax—but they can set up the account with any email address they would like, since they won't need to transfer account records from a previous version.

Whom do I contact if I have a question about AgentMax Online?

If you have an AgentMax Online-related question that's unrelated to setting up more training, please contact your Agent Services team at agencyservices@allianzassistance.com.

Can I sell groups through AgentMax Online?

Yes, you can sell travel insurance for group travel through AgentMax Online. Check out our Group Travel Guide for more details. You can also [contact your District Representative](#) for further training.

How do I install updates to AgentMax Online when they come out?

You won't need to run any updates to AgentMax Online because it's web-based and updates automatically—so you'll always have the latest version when you log into your account.

Thank you for your
partnership!

