

AGENTMAX ONLINE NEW FEATURE – GROUP TRAVEL

September 2020

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GROUP TRAVEL

The ability to sell to groups of travelers (large and small) is now available in AgentMax Online. For those who currently sell to groups using the desktop version, you can now migrate to AgentMax Online if this was holding you back.

If your agency/contract allows you to sell to groups, you'll have this feature enabled in AgentMax Online. The *Manage Groups* button will appear on the homepage and this allows you to book and manage travel insurance plans for groups.

This is your guide to booking protection for Group Travel within the AgentMax Online application.

GROUP TRAVEL OVERVIEW & ACCESS



Group Travel is managed through the *Manage Groups* button on the homepage of AgentMax Online.

- Once in the Group Travel section, you can start by creating a new group or managing existing groups.
- Any groups previously booked in the desktop/software version will be present in AgentMax Online now.
- Policies that are confirmed within a group can also be viewed and managed in the Confirmed queues.
- This section of AgentMax Online can always be accessed by visiting the homepage – it will not have a tab on the top navigation bar.



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Welcome, Yolanda!

ACCESS AMERICA IVR/INTERNET TEST ACCT
F022884 UAT
ACCAM F022884

Switch Agency

Get Quote

State of Residence Select State	Departure Date MM/DD/YYYY
Total Trip Cost \$	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



GROUP TRAVEL

ADD A NEW GROUP



Use the + *New Group* button to start building your new group in AgentMax .

- Existing groups will appear in AgentMax Online, even if they were previously created in the software/desktop version of AgentMax.
- A Group Reference number/ID is assigned to each group created in case groups are not uniquely named.
- This view will act as the Group Travel Queue once you start building groups.
- The initial step of adding a new group will take you to the first section/form within the group travel section.

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

My Bookings All Bookings Sort by: Departure Date Newest Oldest [+ New Group](#) [Refresh](#)

Quotes Pending Confirmed **Group Travel**

Group Status Test - B2BAPC-1823 -

Create Date: 07/01/2020	Departure: 11/22/2020	Product: Group Advantage Plan	Group Total Price Paid: \$862.00
Agent ID: YBRANC	Status: Paid in Full	Destination:	Product ID: 001004715
Policies (Paid): 5(5)	Deposit Date: 07/01/2020		

User Experience Travel -

Create Date: 05/07/2020	Departure: 11/20/2020	Product: Group Advantage Plan	Group Total Price Paid: \$2,438.00
Agent ID: YBRANC	Status: Group Purchase Pending	Destination: LAX	Product ID: 001004715
Policies (Paid): 17(14)	Deposit Date: 05/07/2020		

Teal Water Dreams -

Create Date: 07/21/2020	Departure: 11/01/2020	Product: Group Advantage Plan	Group Total Price Paid: \$196.00
Agent ID: YBRANC	Status: Group Purchase Pending	Destination: Caribbean - Jamaica	Product ID: 001004715



GROUP DETAILS

ADD GROUP INFO

Group Details should be entered at the start of a new group; only the group name and supplier are required. Any data populated will carry over to all travelers added to the group (deposit date, departure/return date, destination).

- Product selection for the group takes place on this form.
- Group information can be modified for each record within the group as necessary prior to purchase. Once a purchase is confirmed within the group – details like departure date, return date, trip cost can only be changed through the normal policy modification process.
- The best practice is to complete all information for the group in this form, even if you need to edit for a few records or travelers within the group.



GROUP POLICIES ADDING RECORDS

Records/Policies (traveler details) are added to the group by either uploading a Traveler List (using the template) or adding each via the *Add Individual Policy* method.

- If you plan to use both methods in a single group, you must start with the list upload first. A traveler list cannot be uploaded to a group once you have started adding individual travelers (same as the desktop method).
- Remember, trip details may already be populated if you previously entered this data on the group *Details* page. You can make modifications for individual travelers if necessary.

The screenshot shows the AgentMax web interface. At the top right, there is a phone icon with the number 855-524-3687 and a Notifications bell icon. Below this is a dark blue navigation bar with links for HOME, ADMINISTRATION, USER OPTIONS, RESOURCE CENTER, WAIVER, REPORTS, HELP, and LOGOUT. Underneath is a filter bar with radio buttons for 'All Insureds' and 'Primary Insureds', a 'Sort by:' dropdown set to 'Departure Date', and radio buttons for 'Newest' and 'Oldest', along with a 'Refresh' button. A 'Modify Group' section contains tabs for 'Details', 'Policies', and 'Agent Payment'. Below this, the group name 'Test/Demo Group III' is displayed, followed by two checkboxes: 'Select to pay all ready Agency Credit Card' and 'Select to pay all ready Cash Withheld'. At the bottom of this section are two blue buttons: 'Add Individual Policy' and 'Upload Traveler List', both of which are highlighted with green arrows. To the right of these buttons are 'Exit' and 'Pay Now' buttons.

The footer section features the Allianz Global Assistance logo on the left. To the right, it contains the following text: '© 2020 Allianz Global Assistance. All Rights Reserved | Privacy | Covered Suppliers'. Below this, it states: 'Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.' A paragraph follows: 'Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and KS. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.' Another paragraph states: 'Insurance benefits underwritten by BCS Insurance Company, Jefferson Insurance Company or Nationwide Mutual Insurance Company and Affiliated Companies, depending on Insured's state of residence and plan type. Plan(s) only available to U.S. residents and may not be available in all jurisdictions. Allianz Global Assistance and Allianz Travel Insurance are brands of AGA Service Company. AGA Service Company is the licensed producer and administrator of these plans and an affiliate of Jefferson Insurance Company. The insured shall not receive any special benefit or advantage due to the affiliation between AGA Service Company and Jefferson Insurance Company. Non-insurance benefits/products are provided and serviced by AGA Service Company. Consumer is responsible for charges incurred from outside vendors for assistance or concierge services. Contact AGA Service Company at 800-284-8300 or 9950 Mayland Drive, Richmond, VA 23233 or customerservice@allianzassistance.com.' At the bottom, there are logos for USA and ASTA.

GROUP POLICIES

UPLOAD TRAVELER LIST



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

All Insureds Primary Insureds

Sort by: Newest Oldest

Refresh

< Modify Group

Details **Policies** Agent Payment

Test/Demo Group III

Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

Add Individual Policy **Upload Traveler List**

Exit Pay Now



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Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.

Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and K.S. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.

Insurance benefits underwritten by BCS Insurance Company, Jefferson Insurance Company or Nationwide Mutual Insurance Company and Affiliated Companies, depending on insured's state of residence and plan type. Plan(s) only available to U.S. residents and may not be available in all jurisdictions. Allianz Global Assistance and Allianz Travel Insurance are brands of AGA Service Company. AGA Service Company is the licensed producer and administrator of these plans and an affiliate of Jefferson Insurance Company. The insured shall not receive any special benefit or advantage due to the affiliation between AGA Service Company and Jefferson Insurance Company. Non-insurance.

Select File to upload policies to group: Test/Demo Group III

Select File

Upload File

Close

Get Template

View Instructions

Adding records by using *Upload Traveler List* allows you to bypass manual data entry of each record. This may be beneficial whenever you have a large list of travellers and at least the trip details are the same or similar for each record.

- Once you hit the *Upload Traveler List* button, you will be prompted to select your file and then upload the file.
- The template should be used and modified by replacing the template data with the information for all travelers in your group.
- Select the *Upload Traveler List* to access the template, along with tips/instructions on using the document.
- The template is also available in the *Resource Center*.



GROUP POLICIES UPLOAD HELP

We have provided a template (Excel) that should be used each time you want to upload a traveler list.

- Just like the desktop version of AgentMax, the template is the only accepted format for a traveler list upload.
- The template has instructions/tips located within the Excel file – click on the red triangular symbols within the top row of each column for instructions.
- There is also a one-page PDF document that contains helpful tips on using and uploading the template.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	
	First Name	Last Name	Date of Birth	Payment Group ID	Address 1	Address 2	City	State	Zip	Phone	E-Mail	Fulfillment Method	Total Trip Cost Per Person	Initial Deposit Date	Final Payment Date	Departure Date	Return Date	Airport Code (Final Destination)	Payment Type		
1					9950 Mayland Dr	Ste 100	Richmond	VA	23233	(804)673- 5478	test@tes t.com	Email	1000.00	04/01/2013	04/17/2013	11/01/2014	11/10/2014	LAX	CW		
2	Test	Test 1	11/05/1982	1234	9950 Mayland Dr	Ste 100	Richmond	VA	23233	(804)673- 5478	test@tes t.com	Email	1000.00	04/01/2013	04/17/2013	11/01/2014	11/10/2014	LAX	CW		
3	Test	Test 2	01/05/1976	1234	123 Main St		Richmond	VA	23111	(804)123- 4568	test@tes t.com	Email	1250.00	03/01/2013	04/16/2013	10/30/2014	11/10/2014	LAX	CC		
4	Test	Test 3	04/08/1952		33 e 2nd Ave		Richmond	VA	23258	(804)123- 3352	test@tes t.com	Mail	1125.32	05/01/2013	12/20/2013	10/30/2014	11/10/2014	LAX	AC		
5	Test	Test 4	03/08/1971																		
6																					
7																					
8																					
9																					
10																					
11																					
12																					



GROUP POLICIES LIST UPLOAD

The *Policies* page will be populated with the records once an upload is complete.

- Once the upload is successful, you can select records for updates and payments from this list.
- The main policyholder for each record is listed and has a drop down menu that allows you to interact with each record in the group.
- If you are ready to pay for records in the group, you can simply select one or multiple records and start the payment process.
- Payment by customer credit card can be processed only from individual records (not multiple records).

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

All Insureds Primary Insureds Sort by: Newest Oldest

< Modify Group

Details **Policies** Agent Payment

Policy upload successful

Test/Demo Group III Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

<input type="checkbox"/> Test, Jan -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$166.00	Status: Ready For Purchase
<input type="checkbox"/> Tester, Alex -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$137.00	Status: Ready For Purchase
<input type="checkbox"/> Testing, Jenny -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input type="checkbox"/> Blue, Chris -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input type="checkbox"/> Orange, Gia -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input type="checkbox"/> Gray, Lisa -	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$137.00	Status: Ready For Purchase



GROUP POLICIES UPLOAD ERROR

When a traveler list upload is unsuccessful, you will be notified by error messaging within the upload section.

- The rows in which the error(s) are present are displayed. If multiple rows have errors, all will be disclosed.
- A description of the exact issue causing the upload error is described in the error message(s).
- Simply review the errors and select the *Close* button to get back to your Excel file.
- Once you make updates to correct any errors, save the file and attempt the traveler list upload again, following the previous steps.

Select File to upload Policies to group: Test - Payment Group ID

File Selected: 20200825_GroupRosterSample_PolicyGroupingExample_v2.xlsx

Buttons: Select File, Upload File, Close, Get Template, View Instructions

Error Message:

- Rows - 2 - 3 Multiple details exist for same Payment GroupID:123.
- Rows - 4 - 6 - 9 - 12 Multiple details exist for same Payment GroupID:456.
- Rows - 7 - 11 - 15 Multiple details exist for same Payment GroupID:789.

Payment Group ID



GROUP POLICIES LIST OF RECORDS (POLICIES)

The view of records (called Policies) within a group will display the same, regardless of the method used to add to the group; Upload of Traveler List or Addition of Individual Policy

- The *Policies* page will show the status of the individual records within the group, so you always know where you left off.
- The next step options are also presented at the bottom of the page for next steps: *Add* more policies, *Pay Now* (pay for selected policy(s)) or *Exit* the group (no additional action, or finish later).

The screenshot displays the Allianz Group Policies interface. At the top, there are filters for 'All Insured' and 'Primary Insured', and a 'Sort by' dropdown set to 'Departure Date' with 'Newest' selected. A 'Refresh' button is in the top right. Below this is a 'Modify Group' section with tabs for 'Details', 'Policies', and 'Agent Payment'. The 'Policies' tab is active, showing a table of records for 'Test Group 123'. The table has columns for 'Departure Date', 'Agent ID', and 'Status'. A green arrow points to the 'Ready For Purchase' status of the first record, a purple arrow points to the 'Confirmed' status of the third record, and a red arrow points to the 'Incomplete Record' status of the fourth record. Below the table are buttons for 'Add Individual Policy', 'Upload Traveler List', 'Exit', and 'Pay Now'. At the bottom, there is a footer with the Allianz logo and a copyright notice: '© 2020 Allianz Global Assistance. All Rights Reserved | Privacy | Covered Suppliers'. Small text below the footer reads: 'Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub-territory may apply. Rental Car Damage and Theft coverage when purchased as part of an annual plan, is not available to TX, NY and KS. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.'

Record Name	Payment Type	Confirmation #	Departure Date	Purchased Date	Agent ID	Total Price	Status
Red, Zachary	Agency Credit Card				YBRANC	\$142.00	Ready For Purchase
Green, Olivia	Customer Credit Card				YBRANC	\$108.00	Ready For Purchase
Teal, Jackson	Customer Credit Card	E12175588407	11/01/2020	8/26/2020	YBRANC	\$285.00	Confirmed
Tan, Lindsay	Customer Credit Card				YBRANC	\$142.00	Incomplete Record
Charcoal, Karl	Customer Credit Card		12/01/2020		YBRANC	\$137.00	Ready For Purchase
Tester, Mindy	Agency Credit Card		12/01/2020		YBRANC	\$226.00	Ready For Purchase
Tester, Millie	Customer Credit Card		12/01/2020		YBRANC	\$166.00	Ready For Purchase
Test, Nicholas	Customer Credit Card		12/01/2020		YBRANC	\$566.00	Ready For Purchase

GROUP POLICIES

ADDING INDIVIDUAL POLICY



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

All Insureds Primary Insureds Sort by: Departure Date Newest Oldest Refresh

Modify Group

Details **Policies** Agent Payment

Test/Demo Group V

Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

Add Individual Policy

Upload Traveler List

Exit

Pay Now

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Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.

Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and KS. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.

Insurance benefits underwritten by BCS Insurance Company, Jefferson Insurance Company or Nationwide Mutual Insurance Company and Affiliated Companies, depending on insured's state of residence and plan type. Plan(s) only available to U.S. residents and may not be available in all jurisdictions. Allianz Global Assistance and Allianz Travel Insurance are brands of AGA Service Company. AGA Service Company is the licensed producer and administrator of these plans and an affiliate of Jefferson Insurance Company. The insured shall not receive any special benefit or advantage due to the affiliation between AGA Service Company and Jefferson Insurance Company. Non-insurance benefits/products are provided and serviced by AGA Service Company. Consumer is responsible for charges incurred from outside vendors for assistance or concierge services. Contact AGA Service Company at 800-284-8300 or 9950 Mayland Drive, Richmond, VA 23233 or customerservice@allianzassistance.com.



Individual Traveller Details

- Once you hit *Add Individual Policy*, you will be taken to a form to add the traveler, trip and cost details.
- The manual addition of records to a group should follow this process; repeat the steps for the record/policy that needs to be added to the group.
- If multiple travellers are required on the policy, this option is presented under the *Traveler Information* section.
- The group name will always be displayed on the *Policies* page to confirm you are in the correct group.

INDIVIDUAL RECORD (POLICY) TRAVELER & TRIP INFO



TEST Group 123

Traveler Information

Primary Traveler Information

First Name <input type="text" value="Jane"/>	Last Name <input type="text" value="Tester"/>	Date Of Birth [Age: 42] <input type="text" value="08/12/1978"/>
Address <input type="text" value="111 Main St"/>	Address 2 <input type="text"/>	City <input type="text" value="Anytown"/>
State Of Residence <input type="text" value="CT-Connecticut"/>	Zip Code <input type="text" value="99999"/>	Phone <input type="text" value="(801) 882-1234"/>
Email <input type="text" value="yolanda.branch@allianz.com"/>		

Other Travelers [Add Traveler](#)

Traveler #2: [Remove](#)

First Name <input type="text" value="James"/>	Last Name <input type="text" value="Tester"/>	Date Of Birth [Age: 45] <input type="text" value="07/12/1975"/>
---	---	---

Trip Information

Total Trip Cost <input type="text" value="\$"/>	Average Cost Per Traveler <input type="text" value="\$"/>	Departure Date <input type="text" value="11/01/2020"/>
Destination		Return Date

Individual Policy details are added record by record and may consist of a single or multiple travellers (when they live in the same household).

- Once you hit *Add Individual Policy*, you will be taken to the form to add the traveller, trip and cost details.
- *Traveler Information*, *Trip Information*, product, and the price quote are all accessed in this form.
- Use the *Add Traveler* link to add multiple travelers to a single record.
- *Total Trip Cost* or *Average Cost Per Traveler* can be entered initially and the system will calculate the opposite field based on the number of travelers.

INDIVIDUAL RECORD (POLICY) TRIP COST & QUOTE



The premium price for the individual record/policy is updated automatically once trip cost information is entered within the form. Prior to this data entry, the system will still calculate a cost, but it will be based on a trip cost of zero.

You can always double-check your premium cost at the end of this form by using the *Check Price* button.

Product benefits and coverage amounts are displayed just as they are in the regular sections of AgentMax Online. This information can be hidden using the caret symbol.

Trip Information

Total Trip Cost ⓘ	Average Cost Per Traveler	Departure Date
\$ 7850.56	\$ 3925.28	11/01/2020
Destination		Return Date
<input type="text"/>		11/07/2020
Suppliers ⓘ Add Supplier		Initial Deposit Date
Ama Waterways	Remove	08/23/2020

Travel provided by the suppliers listed here is not necessarily covered for trip cancellation due to financial default. [Click here](#) to view the current covered suppliers list

Products

Group Advantage Plan	Price
	\$508.00

Benefit	Coverage
Trip Cancellation	\$4,000.00
Trip Interruption	\$6,000.00
Travel/Trip Delay Coverage	\$750.00
Baggage Coverage	\$1,500.00
Baggage Delay Coverage	\$500.00
Emergency Transportation	\$250,000.00
Emergency Medical/Dental Coverage	\$50,000.00
24-Hour Hotline Assistance	Included

INDIVIDUAL RECORD (POLICY) SAVE RECORD/PAYMENT OPTIONS



Confirmation Method

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

Email

Primary Email Address

Secondary Email Address

US Mail

Complete Purchase

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

Customer has agreed to the [Plan and Pricing Details for Group Advantage Plan](#).

Once you select PURCHASE, we will charge your card **\$283.00**

Our promise to you

If you're not completely satisfied, you have 10 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.

Once all information on the individual policy form are completed, you will be presented with options based on the data populated on the form.

- If the form is incomplete – you will only be able to *Save Record to Group*.
- If all required data for payment is complete, you will either be able to *Save Record to Group* or *Purchase* (individual CC payment only).
- If using Agency Credit Card as the payment option, you will need to *Save Record to Group* first.



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Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.

Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and K.S. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.

Insurance benefits underwritten by BCS Insurance Company, Jefferson Insurance Company or Nationwide Mutual Insurance Company and

INDIVIDUAL RECORD (POLICY) POLICIES – OPEN/PAYMENT



Once an individual record has been added to the group, you will be routed back to the group's Policies view.

- The status of the record is updated in real-time, based on the action(s) completed on each record. Some examples are: *Ready for Purchase*, *Confirmed*, *Purchase Rejected*.
- The primary policyholder's name for each record is a link to the options available for that record and you can open/view, delete, print/email, modify – all based on the record's status.

Tester, Millie -		Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase
Open	Credit Card	Purchased Date:	Total Price: \$166.00	
Delete				
Print/Email				
Payment Type: Customer Credit Card		Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase
Confirmation #:		Purchased Date:	Total Price: \$566.00	

[Add Individual Policy](#) [Upload Traveler List](#) [Exit](#) [Pay Now](#)

HOME ADMINISTRATION

Test/Demo Group III

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Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.
Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and KS. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.

Traveler Information

Primary Traveler Information

First Name	Last Name	Date Of Birth [Age - 49]
Millie	Tester	11/15/1970
Address	Address 2	City
101 Main St		Park City
State Of Residence	Zip Code	Phone
UT Utah	99999	(801) 999 1254
Email yolanda.branch@allianz.com		
Other Travelers Add Traveler		

Trip Information

Total Trip Cost	Average Cost Per Traveler	Departure Date
\$ 2400	\$ 2400	12/01/2020
Destination		Return Date
Caribbean - Jamaica		12/15/2020
Suppliers		Initial Deposit Date
A To Z Travel	Remove	08/24/2020

Travel provided by the suppliers listed here is not necessarily covered for trip cancellation due to financial default. [Click here to view the current covered suppliers list](#)

INDIVIDUAL RECORD (POLICY) PAYMENT – CUSTOMER CC



Payment using Customer Credit Card will take you through a checkout experience that differs from the other options.

- This checkout flow is similar to the normal non-group checkout in AgentMax Online.
- Remember that all records in the group must be submitted separately with credit card details when using this checkout method.

Checkout

Payment Method

Credit Card Cash Withheld Agency Credit Card

Total Price : **\$166.00**

Name on Card **Credit Card Number** **Expiration Date**

Millie Tester 4111111111111111 4 2023

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**

millietester@test.com yolanda.branch@testcompany.com

US Mail

Complete Purchase

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

Customer has agreed to the [Plan and Pricing Details](#) for Group Advantage Plan.

Once you select PURCHASE, we will charge your card **\$166.00**

Our promise to you

If you're not completely satisfied, you have 10 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.

GROUP TRAVEL PURCHASE RECEIPT/VIEW



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Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT



< Policy Confirmation

View / Print

Send E-mail

Policy Details

E2173392702 - Group Advantage Plan

Payment Type

Customer Credit Card

Insureds

Millie Tester

Group Name

Test/Demo Group III

Purchase Date

8/27/2020

Card Number

XXXX-XXXX-XXXX-4444

Total Price

\$166.00

Trip dates

12/01/2020-12/15/2020

Confirmation Method

Email

Email Address

millietester@test.com

Policy Confirmation or the purchase receipt from any group travel record with a status of Confirmed can be accessed from the *Policies* page under the primary policyholder's name.

The drop down options will present the option of View – this provides the traditional AgentMax Online purchase receipt detail view.

- The *Group Name* will be listed on the confirmation.

INDIVIDUAL RECORD (POLICY) STATUS & ACTIONS



Charcoal, Karl -

Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Ready For Purchase
Confirmation #: Purchased Date: Total Price: \$137.00

Tester, Mindy -

Payment Type: Agency Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Confirmed
Confirmation #: E2173392699 Purchased Date: 8/27/2020 Total Price: \$226.00

Tester, Millie -

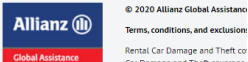
Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Confirmed
Confirmation #: E2173392702 Purchased Date: 8/27/2020 Total Price: \$166.00

Test, Nicholas -

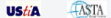
Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Ready For Purchase
Confirmation #: Purchased Date: Total Price: \$566.00

[Add Individual Policy](#) [Upload Traveler List](#)

[Exit](#) [Pay Now](#)



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Rental Car Damage and Theft or Car Damage and Theft coverage Insurance benefits underwritten by Affiliated Companies, depending on availability in all jurisdictions. All is the licensed producer and admin special benefit or advantage due benefits/products are provided a assistance or concierge services. customer.service@allianzasistance.com



Charcoal, Karl -

Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Ready For Purchase
Confirmation #: Purchased Date: Total Price: \$137.00

Tester, Mindy -

Payment Type: Agency Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Confirmed
Confirmation #: E2173392699 Purchased Date: 8/27/2020 Total Price: \$226.00

Tester, Millie -

Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Confirmed
Confirmation #: E2173392702 Purchased Date: 8/27/2020 Total Price: \$166.00

- View
- Modify
- Cancel
- Email
- Print

Payment Type: Customer Credit Card Departure Date: 12/01/2020 Agent ID: YBRANC Status: Ready For Purchase
Confirmation #: Purchased Date: Total Price: \$566.00

[Add Individual Policy](#) [Upload Traveler List](#)

[Exit](#) [Pay Now](#)



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Terms, conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and sub limits may apply.

Rental Car Damage and Theft coverage, when purchased as part of an annual plan, is not available to TX, NY and KS. For WA residents, Rental Car Damage and Theft coverage may not be available in all plans. See your plan details for additional information.

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The *Policies* page for Individual Policy updates remains the same, regardless of entry method used (manual entry or record upload).

- The Status of each record will determine what the drop down options are for the respective record.

GROUP TRAVEL

PAYMENT OF MULTIPLE RECORDS



Test/Demo Group III

Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

<input type="checkbox"/> Test, Jan ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	
Confirmation #:	Purchased Date:	Total Price: \$166.00		
<input type="checkbox"/> Tester, Alex ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	
Confirmation #:	Purchased Date:	Total Price: \$137.00		
<input type="checkbox"/> Testing, Jenny ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	
Confirmation #:	Purchased Date:	Total Price: \$108.00		
Blue, Chris ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Confirmed	
Confirmation #: E2173392688	Purchased Date: 8/27/2020	Total Price: \$108.00		
Orange, Gia ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Confirmed	
Confirmation #: E2173392690	Purchased Date: 8/27/2020	Total Price: \$108.00		
Gray, Lisa ▾				
Payment Type: Cash Withheld	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Confirmed	
Confirmation #: E2173392689	Purchased Date: 8/27/2020	Total Price: \$137.00		
<input type="checkbox"/> Test, Katelyn ▾				
Payment Type: Agency Credit Card	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	
Confirmation #:	Purchased Date:	Total Price: \$108.00		
<input type="checkbox"/> Purple, James ▾				
Payment Type: Agency Credit Card	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	
Confirmation #:	Purchased Date:	Total Price: \$137.00		
<input type="checkbox"/> Pink, Lina ▾				
Payment Type: Agency Credit Card	Departure Date: 12/01/2020	Agent ID: YBRANC	Status: Ready For Purchase	

Payment of multiple records in a group is possible when you are using the checkout or Customer Credit Card payment type.

- The *Policies* page gives this option at the top, using the Select to Pay buttons; you can select all and then deselect as necessary.
- Payment by *Agency Credit Card* can be used whenever you are using your agency or group's company/ corporate card to pay for the policies all at once.
- If your agency is approved to use the *Cash Withheld* payment option, this method can group policies of this payment type and pay all at once.

GROUP POLICIES

PAYMENT OPTIONS (AGENCY CREDIT CARD)



Payment by Agency Credit Card can be completed all at once, with individual transactions, or by groups of transactions. This is up to each AgentMax Online user.

- There is an option to select all with this payment type and you can deselect as needed (all or policy by policy).
- You can also select each individual record and proceed through payment transactions that way.
- Only policies with the Ready for Purchase status can be selected for payment.

Details	Policies	Agent Payment
Test/Demo Group III		
		<input checked="" type="checkbox"/> Select to pay all ready Agency Credit Card <input type="checkbox"/> Select to pay all ready Cash Withheld
<input type="checkbox"/> Test, Jan	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date: Agent ID: YBRANC Total Price: \$166.00 Status: Ready For Purchase
<input type="checkbox"/> Tester, Alex	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date: Agent ID: YBRANC Total Price: \$137.00 Status: Ready For Purchase
<input type="checkbox"/> Testing, Jenny	Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date: Agent ID: YBRANC Total Price: \$108.00 Status: Ready For Purchase
Blue, Chris	Payment Type: Cash Withheld Confirmation #: E2173392688	Departure Date: 12/01/2020 Purchased Date: 8/27/2020 Agent ID: YBRANC Total Price: \$108.00 Status: Confirmed
Orange, Gia	Payment Type: Cash Withheld Confirmation #: E2173392690	Departure Date: 12/01/2020 Purchased Date: 8/27/2020 Agent ID: YBRANC Total Price: \$108.00 Status: Confirmed
Gray, Lisa	Payment Type: Cash Withheld Confirmation #: E2173392689	Departure Date: 12/01/2020 Purchased Date: 8/27/2020 Agent ID: YBRANC Total Price: \$137.00 Status: Confirmed
<input checked="" type="checkbox"/> Test, Katelyn	Payment Type: Agency Credit Card Confirmation #:	Departure Date: 12/01/2020 Purchased Date: Agent ID: YBRANC Total Price: \$108.00 Status: Ready For Purchase
<input checked="" type="checkbox"/> Purple, James	Payment Type: Agency Credit Card Confirmation #:	Departure Date: 12/01/2020 Purchased Date: Agent ID: YBRANC Total Price: \$137.00 Status: Ready For Purchase

AGENT PAYMENT AGENCY CREDIT CARD



Group Advantage Plan

Agency Credit Card Cash Withheld

Test/Demo Group III

Agency Credit Card Policies To Be Paid	Premium
Test, Katelyn	\$108.00
Purple, James	\$137.00
Pink, Lina	\$166.00
Red, Zachary	\$137.00
Tester, Mindy	\$226.00

Total Agency Credit Card: \$774.00

Name on Card Credit Card Number Expiration Date

Billing Address

Address 1 Address 2 City
State Of Residence Zip Code Phone

Complete Purchase

- Customer has agreed to the [Purchase Terms and Disclosures](#)
 Customer has agreed to the [Plan and Pricing Details](#) for Group Advantage Plan.
Once you select PURCHASE, we will charge your card \$774.00

Red, Zachary \$137.00
Tester, Mindy \$226.00
Total Agency Credit Card: \$774.00

Name on Card Credit Card Number Expiration Date

Billing Address

Address 1 Address 2 City
111 Meadowland Lane Salt Lake City
State Of Residence Zip Code Phone
UT Utah 84002-0000

Complete Purchase
 Customer has agreed to the [Purchase Terms and Disclosures](#)
 Customer has agreed to the [Plan and Pricing Details](#) for Group Advantage Plan.
Once you select PURCHASE, we will charge your card \$774.00

Our promise to you
If you're not completely satisfied, you have 30 days for a money-back guarantee. No questions asked. Refund available within 30 days of purchase. For the details, see our [refund policy](#).

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Terms, Conditions, and exclusions apply. Please see your plan for full details. Benefits/Coverage may vary by state and can change over time.
Benefit/Coverage and Third-Party Coverage are provided as part of an annual plan. Not available for all plans. For the details, see our [Benefit/Coverage and Third-Party Coverage](#) page. Not available in all states. See your plan details for additional information.

Once policies ready for purchase are selected and the Pay Now button is hit, you will be taken to the Agent Payment page.

- This is the section where the Agency Credit Card details (including credit card information) will be completed.
- Individual customer credit card payments should **not** be completed this way.
- This page will display all records you've selected to complete payment for and the total to be charged to your agency credit card.

AGENT PAYMENT AGENCY CARD – SUCCESS



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

The Test/Demo Group III group policy purchase succeeded.

All Insureds Primary Insureds

Sort by:

Newest Oldest

Refresh

Modify Group

Details Policies Agent Payment

Test/Demo Group III

Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

Test, Jan

Payment Type: Cash Withheld

Departure Date: 12/01/2020

Agent ID: YBRANC

Status: Ready For Purchase

Confirmation #:

Purchased Date:

Total Price: \$166.00

Tester, Alex

Payment Type: Cash Withheld

Departure Date: 12/01/2020

Agent ID: YBRANC

Status: Ready For Purchase

Confirmation #:

Purchased Date:

Total Price: \$137.00

Testing, Jenny

Payment Type: Cash Withheld

Departure Date: 12/01/2020

Agent ID: YBRANC

Status: Ready For Purchase

Confirmation #:

Purchased Date:

Total Price: \$108.00

Blue, Chris

Upon a successful purchase transaction of all selected records paid by the Agency Credit Card option, you will see a banner displayed.

- The banner only remains in view for ten seconds and indicates success (or failure, when applicable).

GROUP POLICIES

PAYMENT OPTIONS (CASH WITHHELD)



Payment by Cash Withheld method (if available to your agency) can be completed all at once, by individual transactions, or by grouped transactions. This is up to each AgentMax Online user.

- There is an option to select all with this payment type and you can deselect as needed (all, or policy by policy).
- You can also select each individual record and proceed to the payment transactions that way.

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

All Insureds Primary Insureds Sort by: Newest Oldest

< Modify Group

Details Policies Agent Payment

Test/Demo Group III Select to pay all ready Agency Credit Card Select to pay all ready Cash Withheld

<input checked="" type="checkbox"/> Test, Jan - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$166.00	Status: Ready For Purchase
<input checked="" type="checkbox"/> Tester, Alex - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$137.00	Status: Ready For Purchase
<input checked="" type="checkbox"/> Testing, Jenny - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input checked="" type="checkbox"/> Blue, Chris - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input checked="" type="checkbox"/> Orange, Gia - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$108.00	Status: Ready For Purchase
<input checked="" type="checkbox"/> Gray, Lisa - Payment Type: Cash Withheld Confirmation #:	Departure Date: 12/01/2020 Purchased Date:	Agent ID: YBRANC Total Price: \$137.00	Status: Ready For Purchase
<input type="checkbox"/> Test, Katelvn -			

AGENT PAYMENT CASH WITHHELD



Once policies ready for purchase are selected and the *Pay Now* button is hit, you will be taken to the *Agent Payment* page.

- This is the section where the Cash Withheld payment transaction is started and completed.
- After a successful purchase transaction of all selected records paid by the Agency Credit Card option, you will see a banner displayed.
- The banner only remains in view for ten seconds and indicates success (or failure, when applicable).

Modify Group

Details Policies Agent Payment

Group Advantage Plan

Agency Credit Card Cash Withheld

Test/Demo Group III

Cash Withheld Policies To Be Paid	Premium
Blue, Chris	\$108.00
Orange, Gia	\$108.00
Gray, Lisa	\$137.00

Total Cash Withheld: \$353.00

Complete Purchase

- Customer has agreed to the [Purchase Terms and Disclosures](#)
- Customer has agreed to the [Plan and Pricing Details](#) for Group Advantage Plan.

Purchase



Our promise to you

If you're not completely satisfied, you have 10 days to request a refund, provided you haven't started refundable after this period.

The screenshot shows the 'Agent Payment' page with a green success banner at the top: 'The Test/Demo Group III group policy purchase succeeded.' Below the banner is a table of policies with columns for Name, Department, Agent, and Status. The table lists three policies: Blue, Chris; Orange, Gia; and Gray, Lisa.

Name	Department	Agent	Status
Blue, Chris	130501000	Y55AHC	Ready for Purchase
Orange, Gia	130510000	Y55AHC	Ready for Purchase
Gray, Lisa	130510000	Y55AHC	Ready for Purchase

GROUP TRAVEL

GROUP QUEUES – OVERVIEW



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

My Bookings All Bookings Sort by: Departure Date Newest Oldest + New Group Refresh

Quotes Pending Confirmed **Group Travel**

Mountain Hikers Test Group - Create Date: 07/26/2020 Agent ID: YBRANC Policies (Paid): 5(0)	Departure: 05/02/2021 Status: Open Deposit Date: 07/26/2020	Product: Group Advantage Plan Destination: Australia	Group Total Price Paid: \$0.00 Product ID: 001004715
Test/Demo Group II - Create Date: 08/25/2020 Agent ID: YBRANC Policies (Paid): 14(11)	Departure: 01/03/2021 Status: Paid in Full Deposit Date: 08/25/2020	Product: Group Advantage Plan Destination: South America - Brazil	Group Total Price Paid: \$1,449.00 Product ID: 001004715
Test/Demo Group I - Create Date: 08/23/2020 Agent ID: YBRANC Policies (Paid): 4(1)	Departure: 01/01/2021 Status: Paid in Full Deposit Date: 08/20/2020	Product: Group Advantage Plan Destination: Canada	Group Total Price Paid: \$342.00 Product ID: 001004715

The *Group Travel* queues page will provide an overview of each group's details.

- The status of the group is available and updated in real-time (i.e. payments, travel dates) and when policies are confirmed, the total premium amount paid is also updated.
- The total number of records/policies within the group is displayed with the number of paid policies.
- At this time, groups cannot be deleted.

GROUP TRAVEL QUEUES – OPEN GROUP



The Group Travel queues tab will automatically appear once you enter the section by the Manage Groups button on the homepage of AgentMax Online.

- Groups can be sorted by varying parameters like Departure Date, Create Date, and Saved Date.
- Access to other group bookings may be available – check with your AgentMax Online administrator.

Quotes	Pending	Confirmed	Group Travel
Mountain Hikers Test Group			
Create Date: 07/26/2020	Agent ID: YBRANC	Policies (Paid): 5(0)	Departure: 05/02/2021 Status: Open Deposit Date: 07/26/2020
			Product: Group Advantage Plan Destination: Australia Group Total Price Paid: \$0.00 Product ID: 001004715
Test/Demo Group II			
Open Group Group Ref. No. 51241			Departure: 01/03/2021 Status: Paid in Full Deposit Date: 08/25/2020
			Product: Group Advantage Plan Destination: South America - Brazil Group Total Price Paid: \$1,449.00 Product ID: 001004715
Test/Demo Group I			
Create Date: 08/23/2020	Agent ID: YBRANC	Policies (Paid): 4(1)	Departure: 01/01/2021 Status: Paid in Full Deposit Date: 08/20/2020
			Product: Group Advantage Plan Destination: Canada Group Total Price Paid: \$342.00 Product ID: 001004715
Test - Payment Group ID			

GROUP TRAVEL QUEUES – OPEN GROUP



855-524-3687

Notifications

HOME ADMINISTRATION USER OPTIONS RESOURCE CENTER WAIVER REPORTS HELP LOGOUT

Modify Group

Details Policies Agent Payment

Enter group information. Please fill all group information and select a product

Group Details

Group Name
Test/Demo Group III

Departure Date
12/01/2020

Destination
Caribbean - Jamaica

Return Date
12/15/2020

Suppliers [Add Supplier](#)
A To Z Travel

Travel provided by the suppliers listed here
trip cancellation due to financial default. Click
covered suppliers list

Additional Information

Group Ref. No. 16081

Agent ID
YBRANC

Trip ID (Optional)

Products

Group Advantage Plan

Travel Protection for Groups (NY and WA)

Whenever you go back to the group travel section you will be taken to the *Details* page once you select Open Group from the drop down menu under each group name.

- Details of the group can be modified, as long as travel has not started; OR you can simply bypass this tab and continue managing/adding in the Policies tab.
- Once a group is saved, the unique *Group Reference number* will be added to the *Details* (and the policy confirmation on purchased policies).



ADDITIONAL TOOLS & TIPS

Group Travel Tools & Tips

- Groups are saved automatically on the *Details* page once you have all required information and have selected a product. You can update group details after creating the group – update the respective information and then reselect a product (the page will refresh).
- At this time, deleting groups is not an option; an alternative consider is renaming the groups you want to ignore. For example, you could append the name with something like “CANCELED GROUP – Current Group Name” or “NULL GROUP – Current Group Name”
- Policies that are confirmed within a group can also be viewed and managed within the normal AgentMax Online Confirmed Queues page(s); updates made in either section of the queues (Confirmed or Group Travel) will be reflected within the group page.
- Within the group travel section, you are not automatically taken to the policy confirmation/purchase receipt view after payment – you must navigate to this page from the *Policies* page (within Group Travel) and then select the *View* option from the dropdown menu.
- If you do not currently have access to group travel, please see your AgentMax administrator.



GROUP TRAVEL

Thank you and we hope you enjoy using the new Group Travel feature in AgentMax Online. Please share questions and feedback with your district representative.