AGENTMAX ONLINE
NEW FEATURE – GROUP TRAVEL

September 2020

Strictly Confidential

Allianz Partners

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.

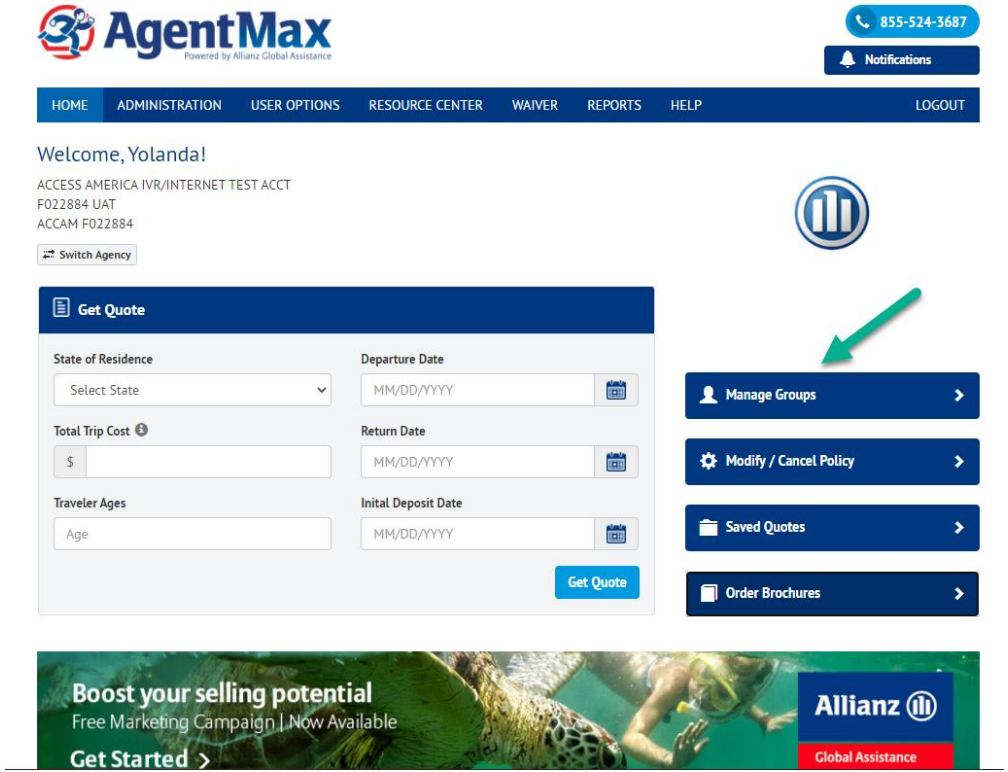
This is your guide to booking protection for Group Travel within the AgentMax Online application.

© Copyright Allianz Partners

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.

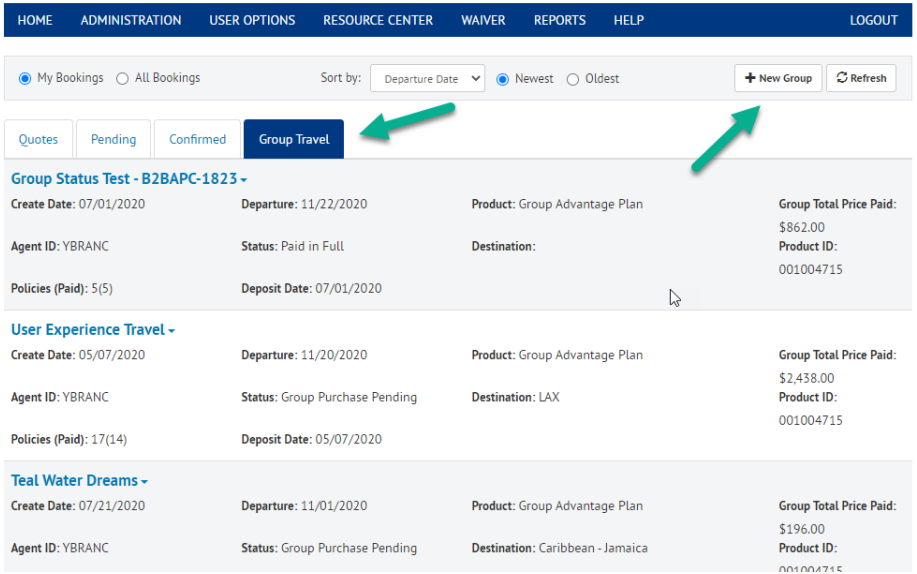


© Copyright Allianz Partners

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.

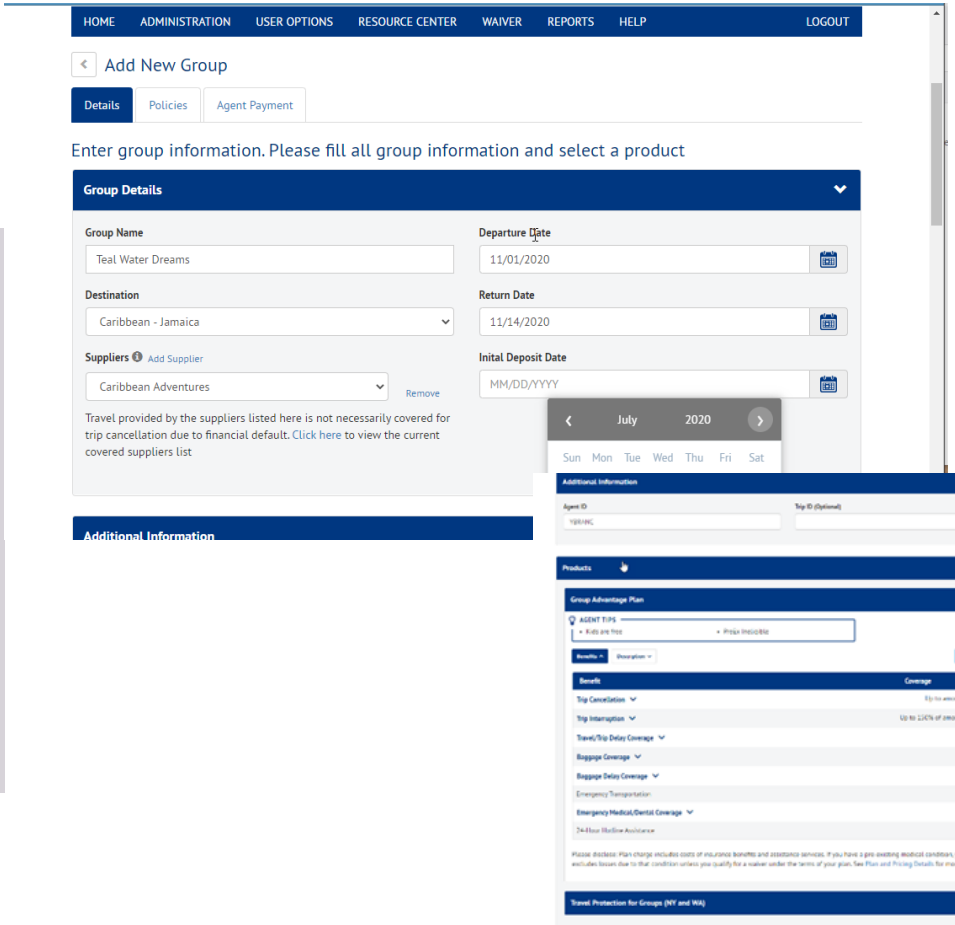


© Copyright Allianz Partners

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.

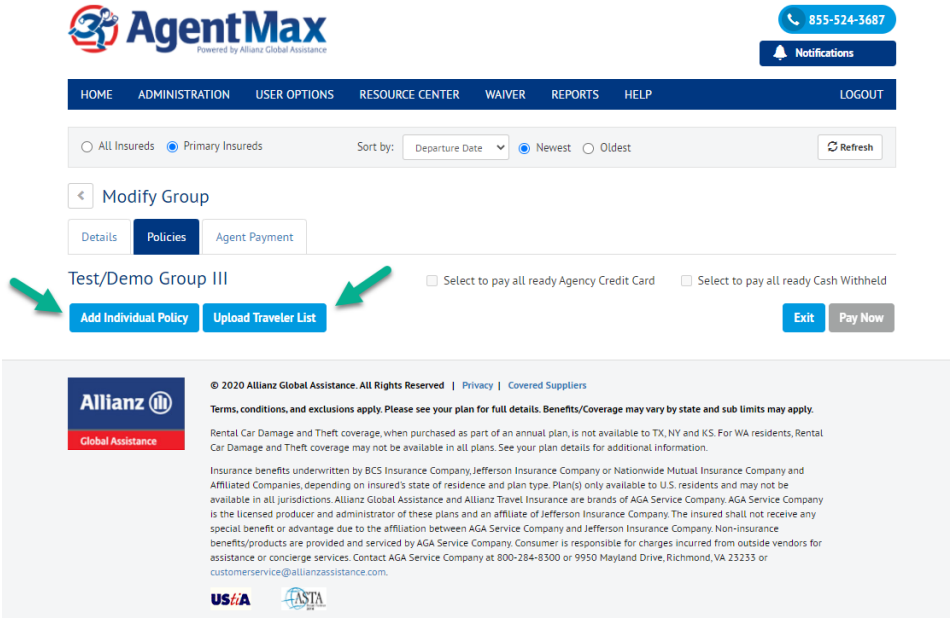


© Copyright Allianz Partners

GROUP POLICIES
ADDING RECORDS

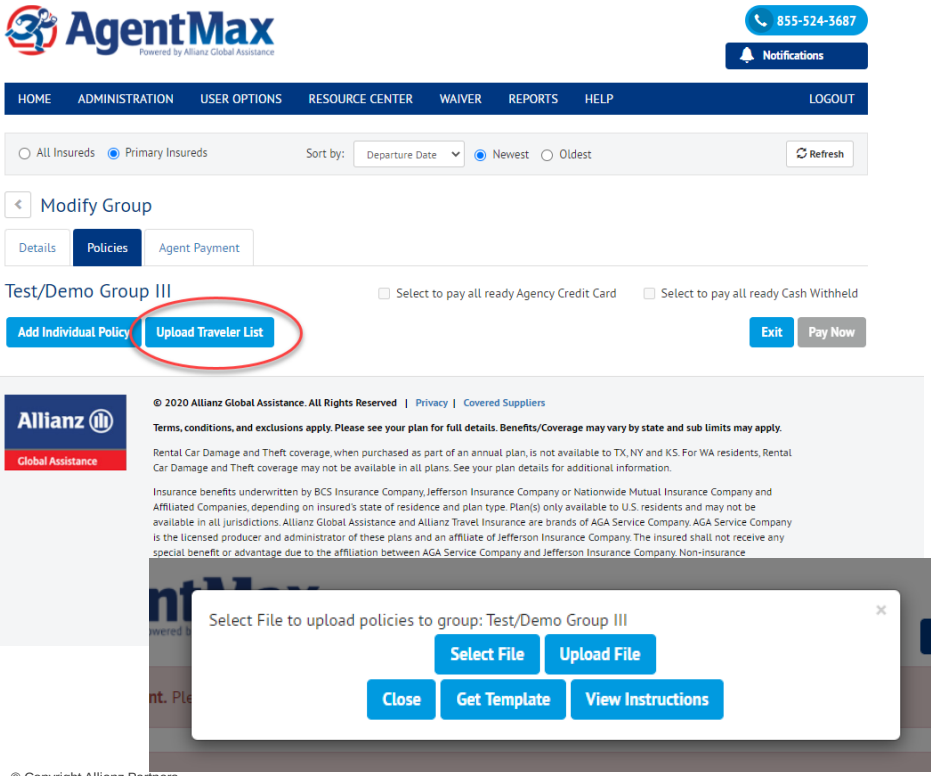
Records/Policies (traveler details) are added to the group by either uploading a Traveler List (using the template) or adding each via the *Add Individual Policy* method.

- 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.



© Copyright Allianz Partners

GROUP POLICIES
UPLOAD TRAVELER LIST



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.

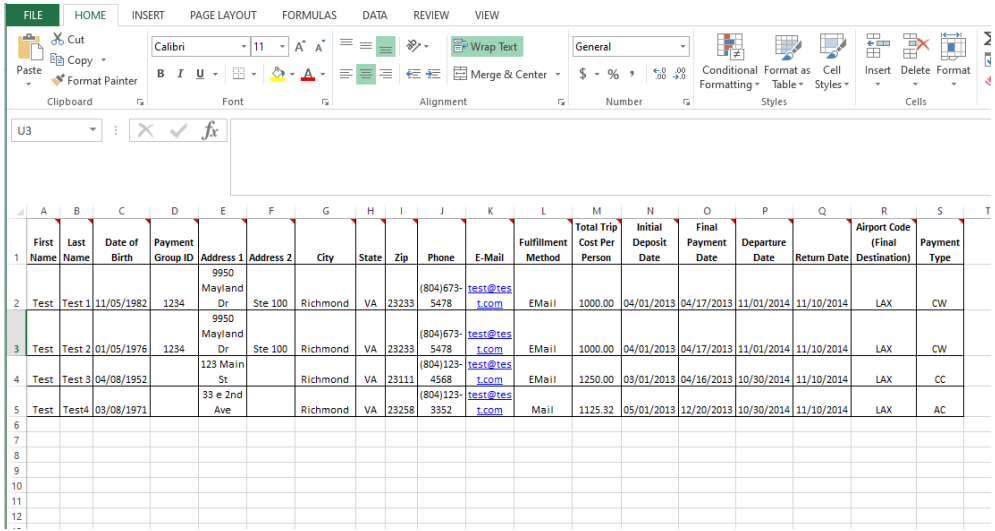
- Once you hit the *Upload Traveler* List button, you will be prompted to select your file and then upload the file.
- The template should be used and modified by replacing the template data with the information for all travelers in your group.
- Select the *Upload Traveler List* to access the template,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

© Copyright Allianz Partners

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.



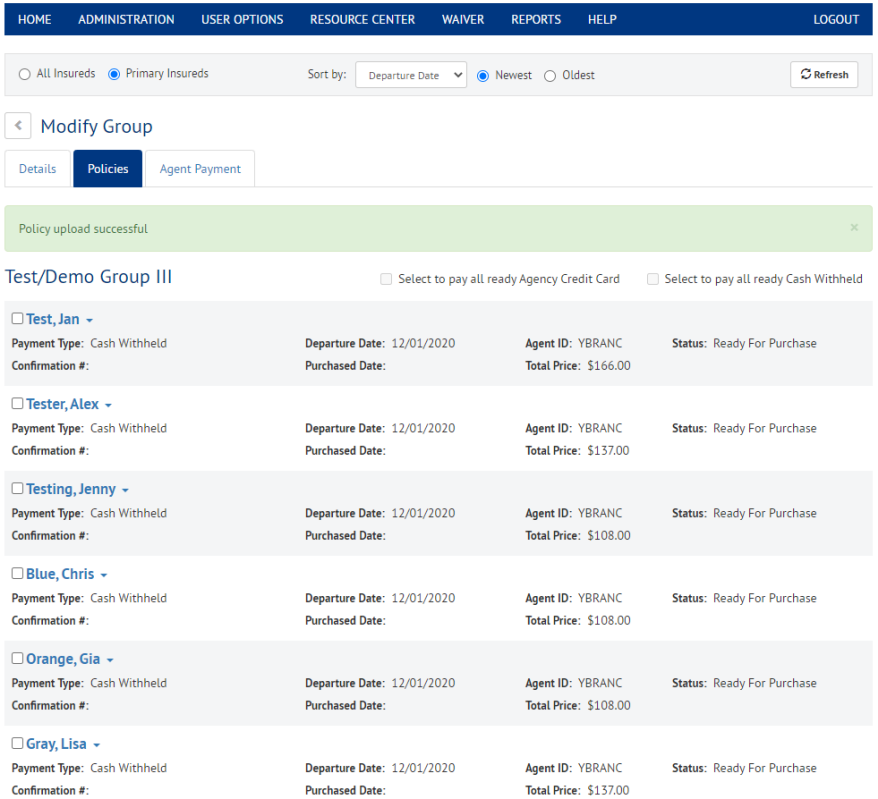
First Name	Last Name	Date of Birth	Payment Group ID	Address 1	Address 2	City	State	Zip	Phone	E-Mail	Fulfillment Method	Total Trip Cost Per Person	Initial Deposit Date	Final Payment Date	Departure Date	Return Date	Airport Code (Final Destination)	Payment Type
Test	Test 1	11/05/1982	1234	9950 Mayland Dr	Ste 100	Richmond	VA	23233	(804)673-5478	test@test.com	EMail	1000.00	04/01/2013	04/17/2013	11/01/2014	11/10/2014	LAX	CW
Test	Test 2	01/05/1976	1234	9950 Mayland Dr	Ste 100	Richmond	VA	23233	(804)673-5478	test@test.com	EMail	1000.00	04/01/2013	04/17/2013	11/01/2014	11/10/2014	LAX	CW
Test	Test 3	04/08/1952		123 Main St		Richmond	VA	23111	(804)123-4568	test@test.com	EMail	1250.00	03/01/2013	04/16/2013	10/30/2014	11/10/2014	LAX	CC
Test	Test4	03/08/1971		33 e 2nd Ave		Richmond	VA	23258	(804)123-3352	test@test.com	Mail	1125.32	05/01/2013	12/20/2013	10/30/2014	11/10/2014	LAX	AC

© Copyright Allianz Partners

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).

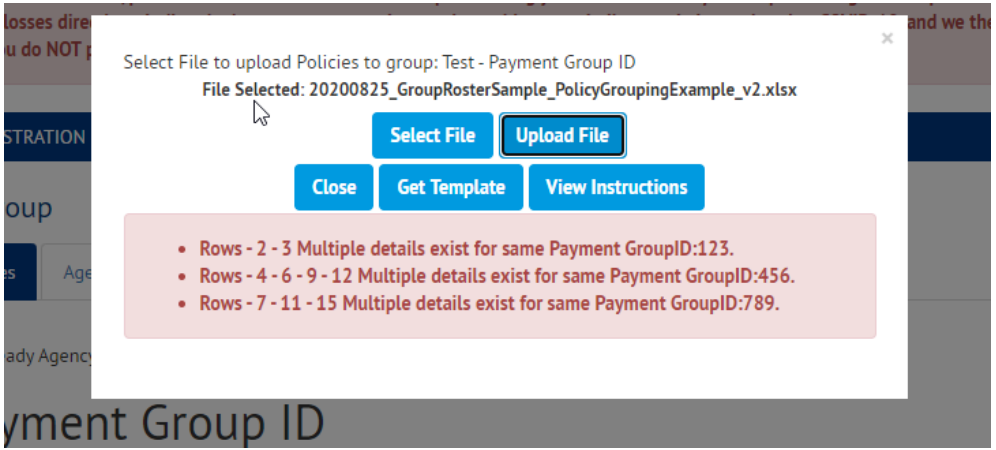


© Copyright Allianz Partners

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.

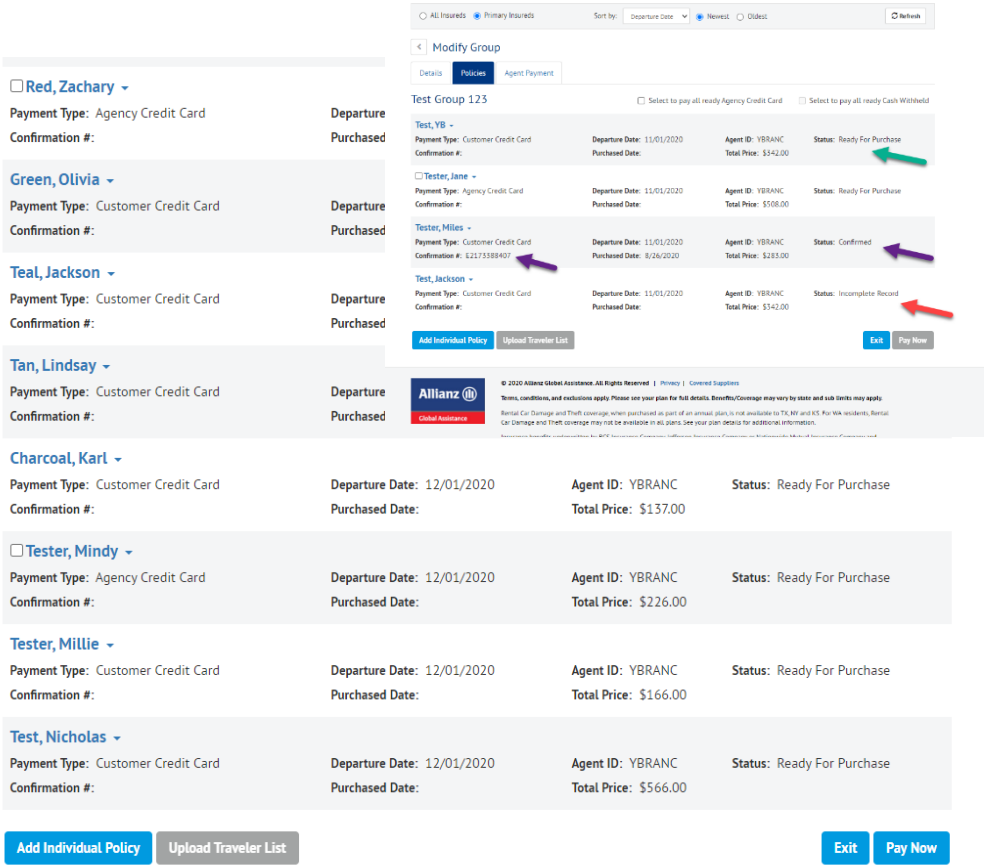


© Copyright Allianz Partners

GROUP POLICIES
LIST OF RECORDS (POLICIES)

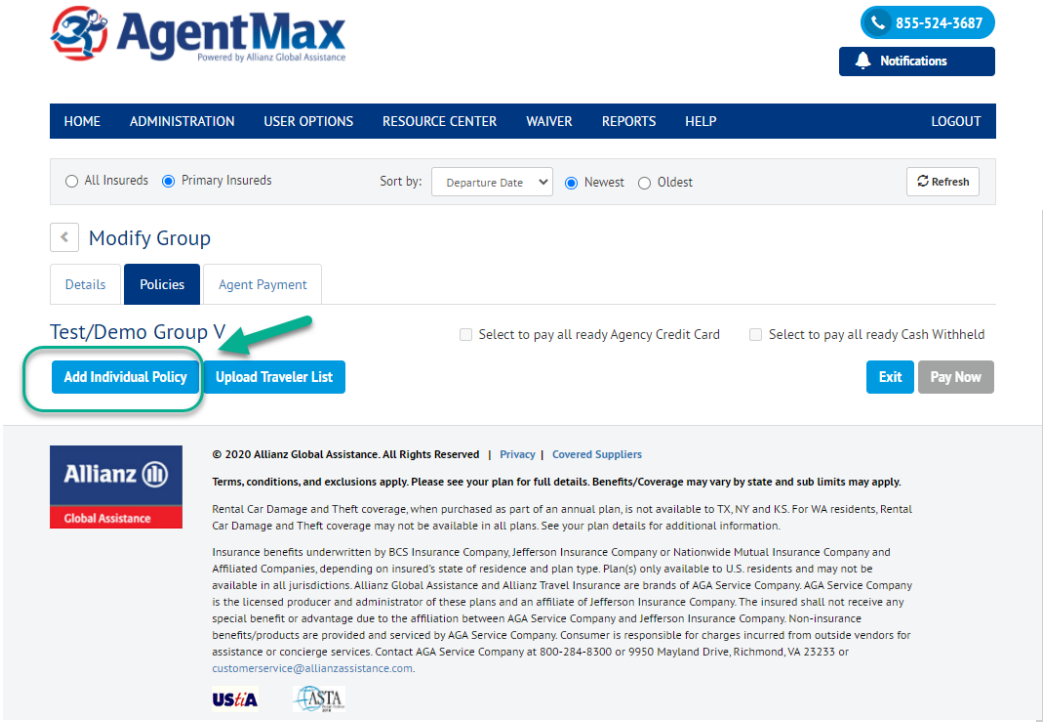
The view of records (called Policies) within a group will display the same, regardless of the method used to add to the group; Upload of Traveler List or Addition of Individual Policy

- 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).



© Copyright Allianz Partners

GROUP POLICIES
ADDING INDIVIDUAL POLICY

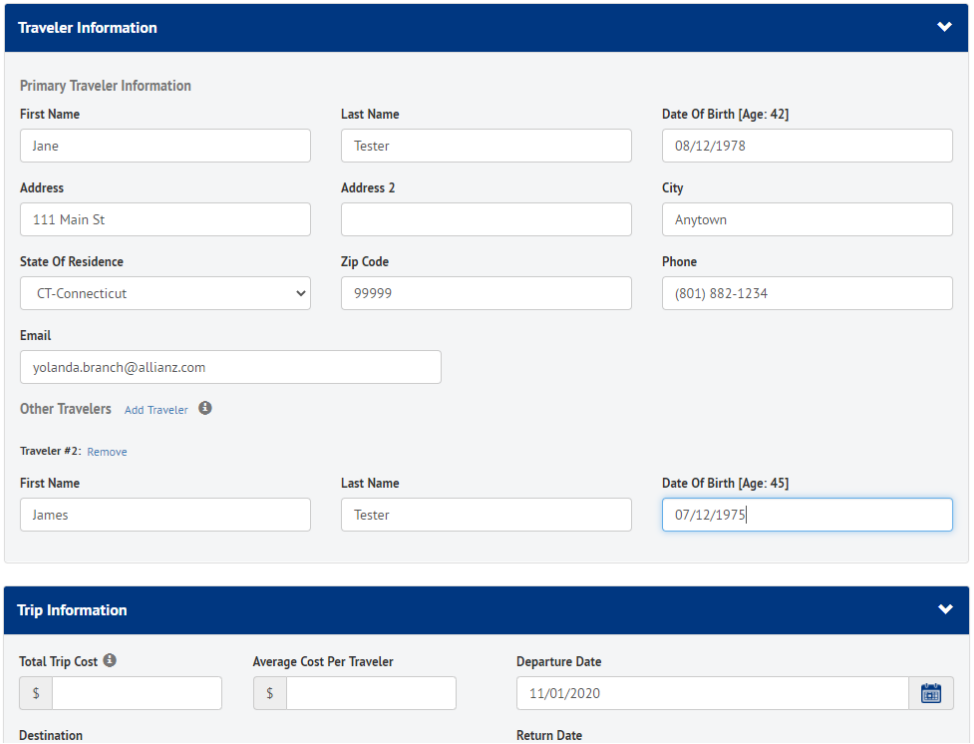


Individual Traveller Details

- 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.

© Copyright Allianz Partners

INDIVIDUAL RECORD (POLICY)
TRAVELER & TRIP INFO



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.

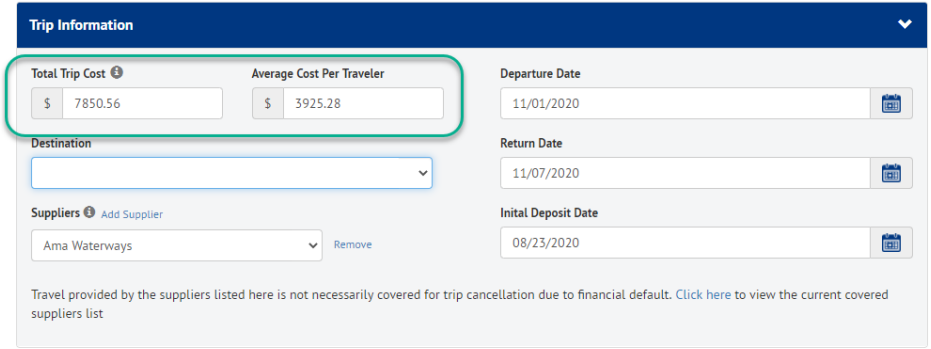
© Copyright Allianz Partners

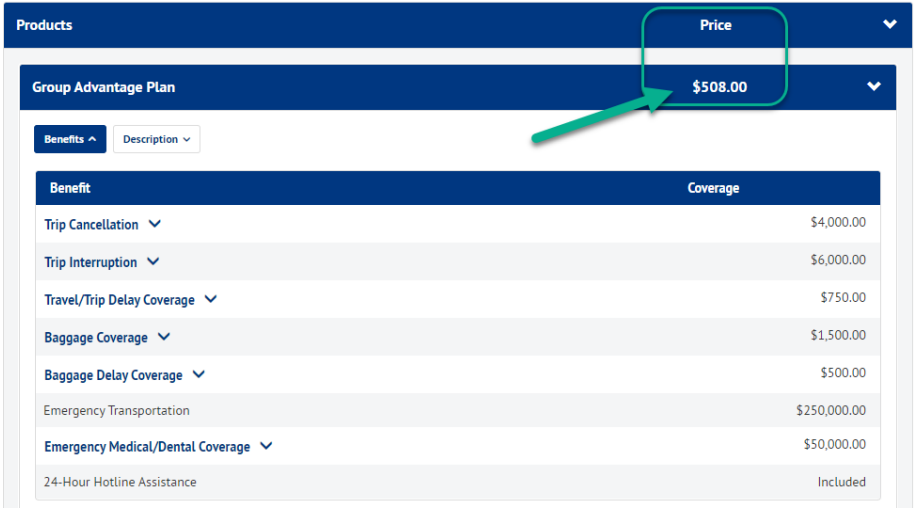
INDIVIDUAL RECORD (POLICY)
TRIP COST & QUOTE

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.

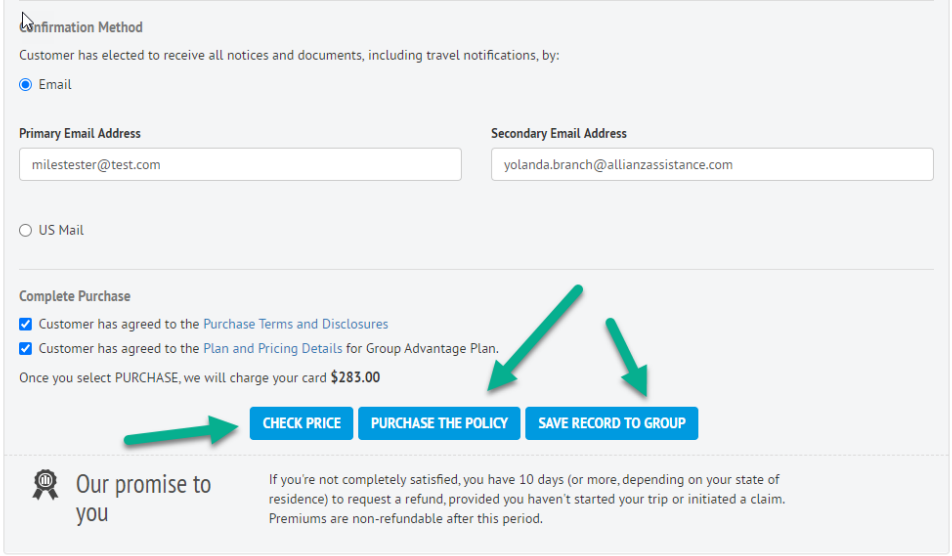
Product benefits and coverage amounts are displayed just as they are in the regular sections of AgentMax Online. This information can be hidden using the caret symbol.

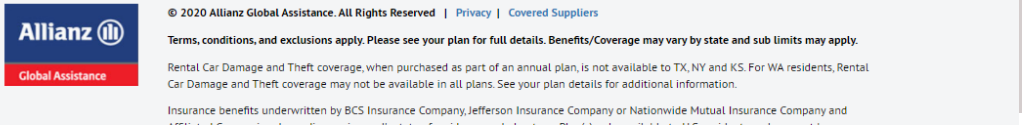




© Copyright Allianz Partners

INDIVIDUAL RECORD (POLICY)
SAVE RECORD/PAYMENT OPTIONS





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

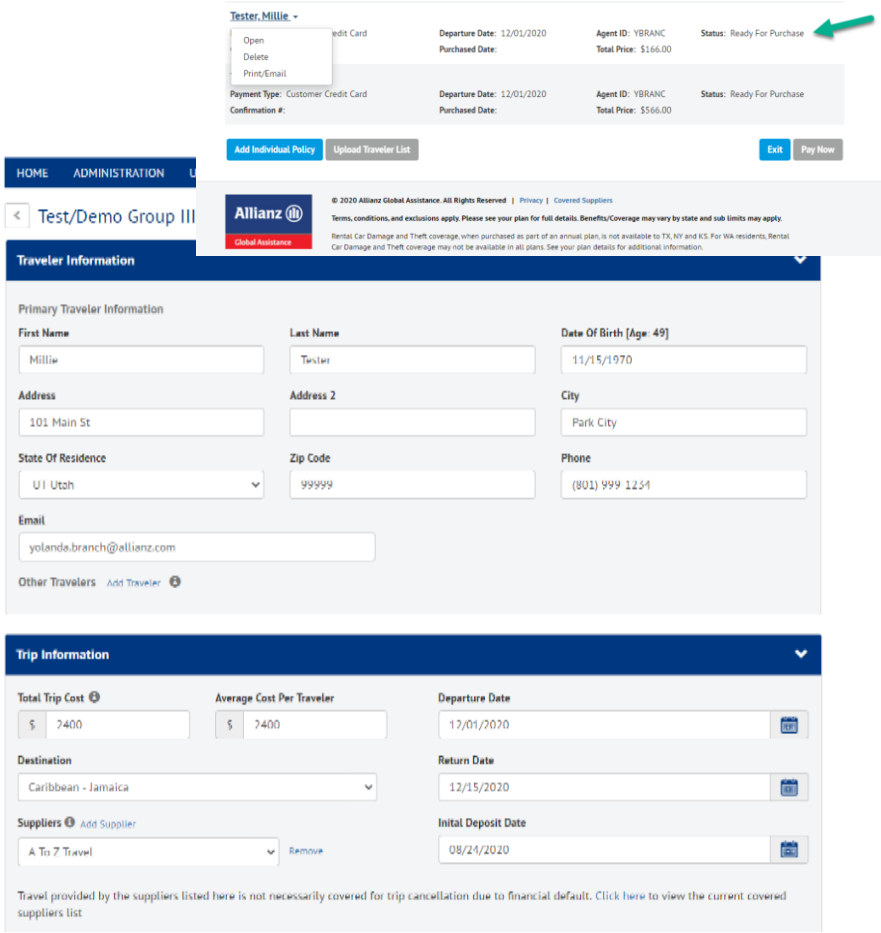
- If the form is incomplete – you will only be able *to Save Record to Group.*
- If all required data for payment is complete, you will either be able to *Save Record to Group* or Purchase (individual CC payment only).
- If using Agency Credit Card as the payment option, you will need to *Save Record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

© Copyright Allianz Partners

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.

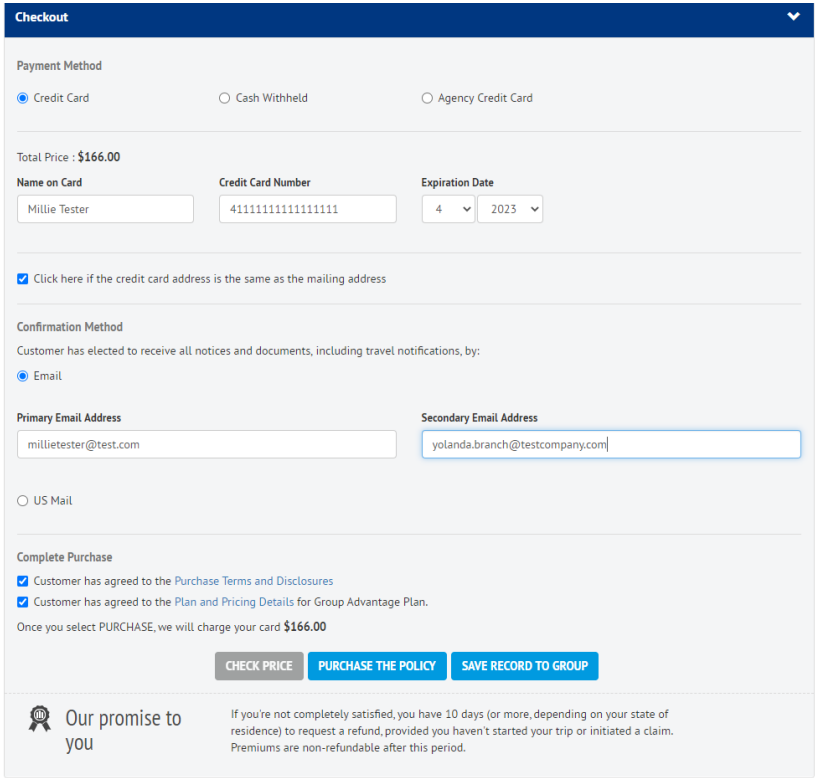


© Copyright Allianz Partners

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.



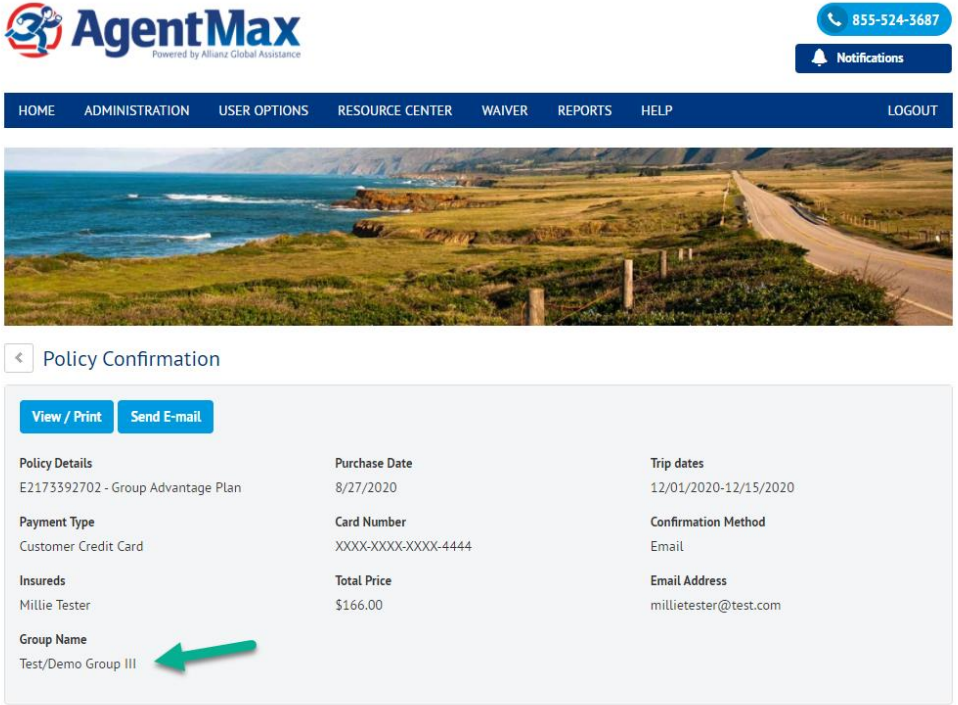
© Copyright Allianz Partners

GROUP TRAVEL
PURCHASE RECEIPT/VIEW

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

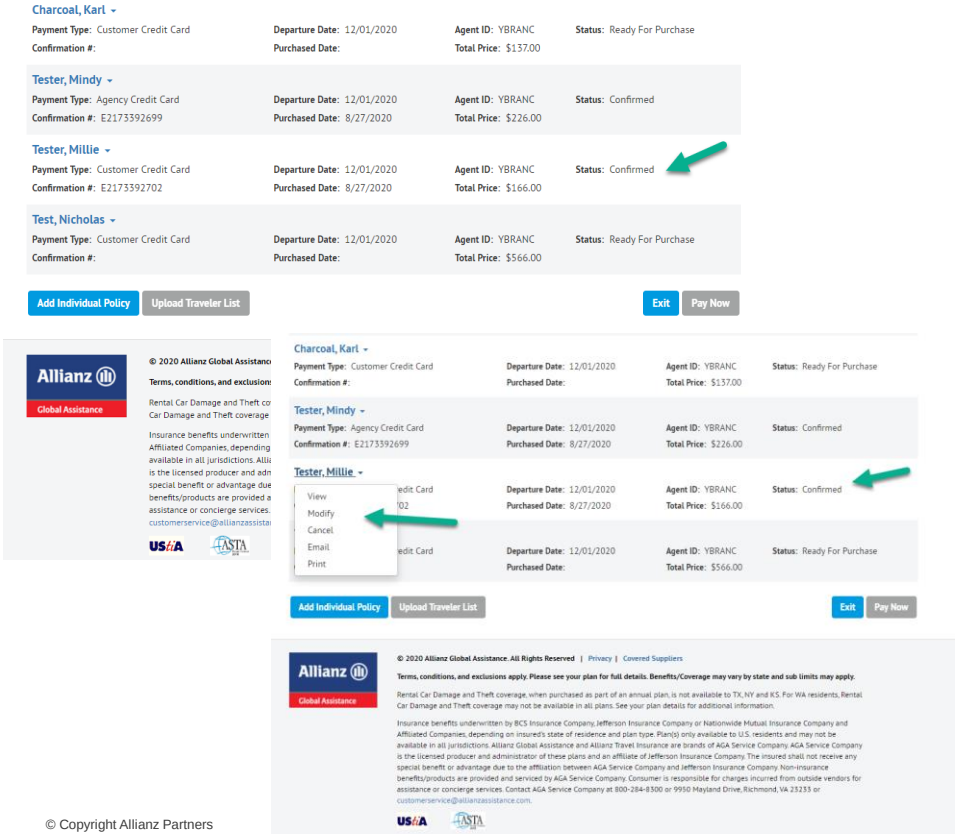
The drop down options will present the option of View – this provides the traditional AgentMax Online purchase receipt detail view.

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



© Copyright Allianz Partners

INDIVIDUAL RECORD (POLICY)
STATUS & ACTIONS



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.

© Copyright Allianz Partners

GROUP TRAVEL
PAYMENT OF MULTIPLE RECORDS

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

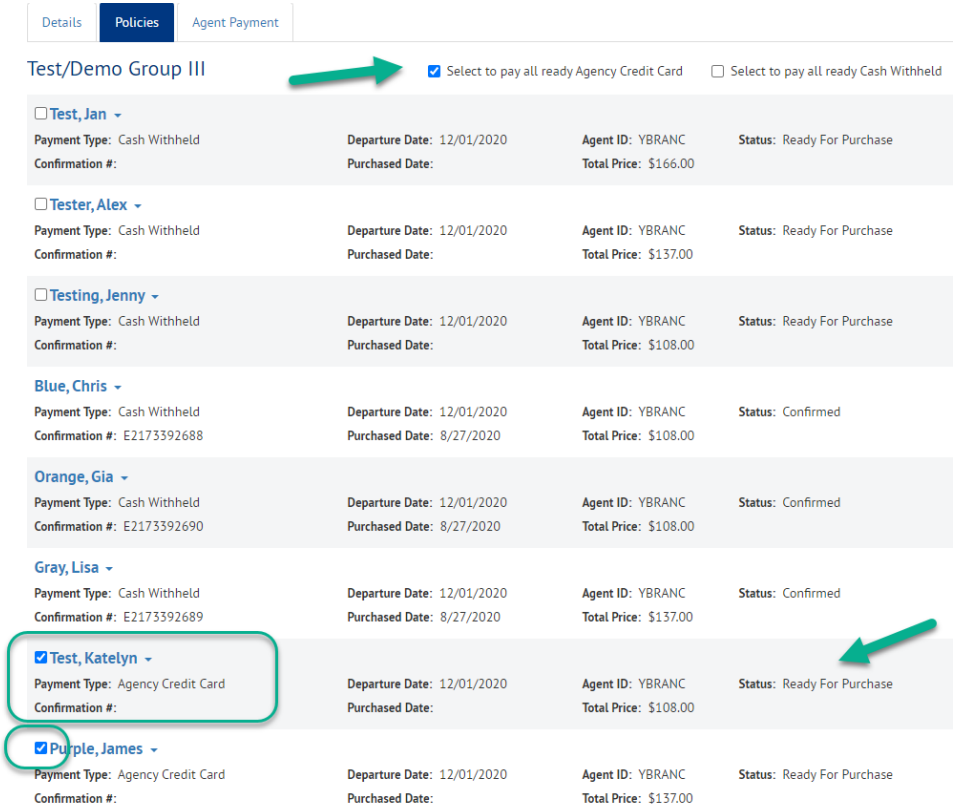
- The *Policies* page gives this option at the top, using the Select to Pay buttons; you can select all and then deselect as necessary.
- Payment by *Agency Credit Card* can be used whenever you are using your agency or group's company/ corporate card to pay for the policies all at once.
- If your agency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

© Copyright Allianz Partners

GROUP *POLICIES*
PAYMENT OPTIONS (AGENCY CREDIT CARD)

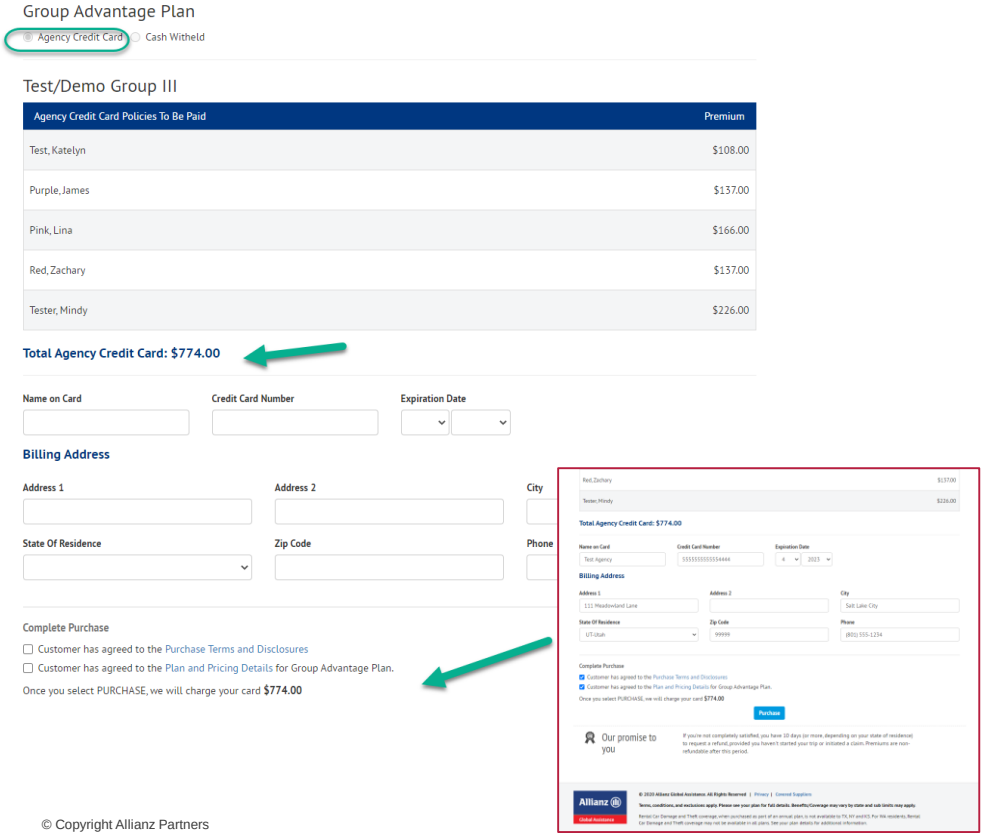
Payment by Agency Credit Card can be completed all at once, with individual transactions, or by groups of transactions. This is up to each AgentMax Online user.

- 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.



© Copyright Allianz Partners

AGENT PAYMENT
AGENCY CREDIT CARD

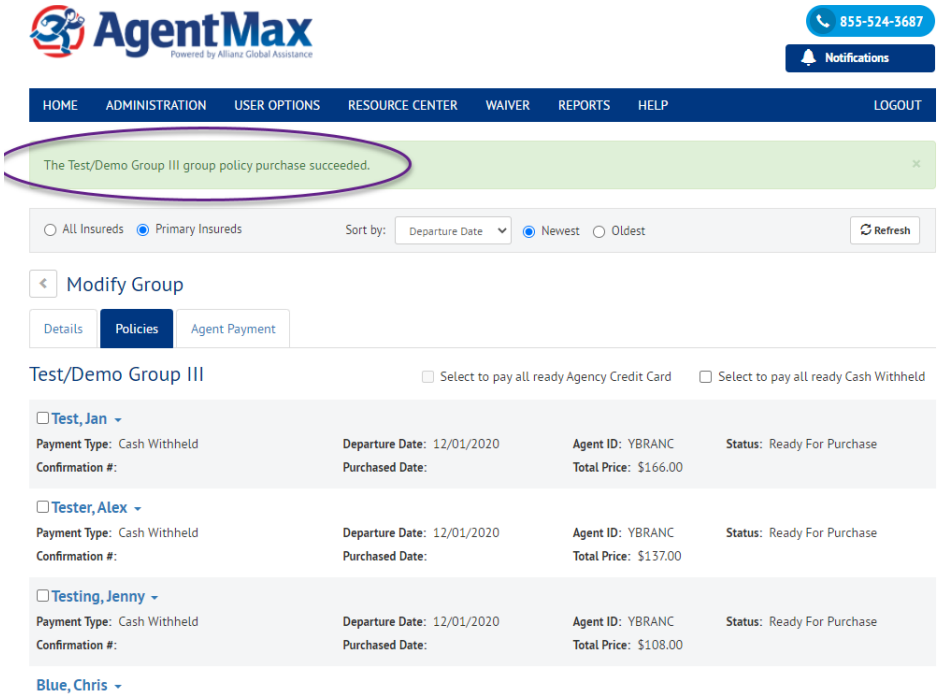


Once policies ready for purchase are selected and the Pay Now button is hit, you will be taken to the Agent Payment page.

- This is the section where the Agency Credit Card details (including credit card information) will be completed.
- Individual customer credit card payments should **no**t 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.

© Copyright Allianz Partners

AGENT PAYMENT
AGENCY CARD – SUCCESS



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

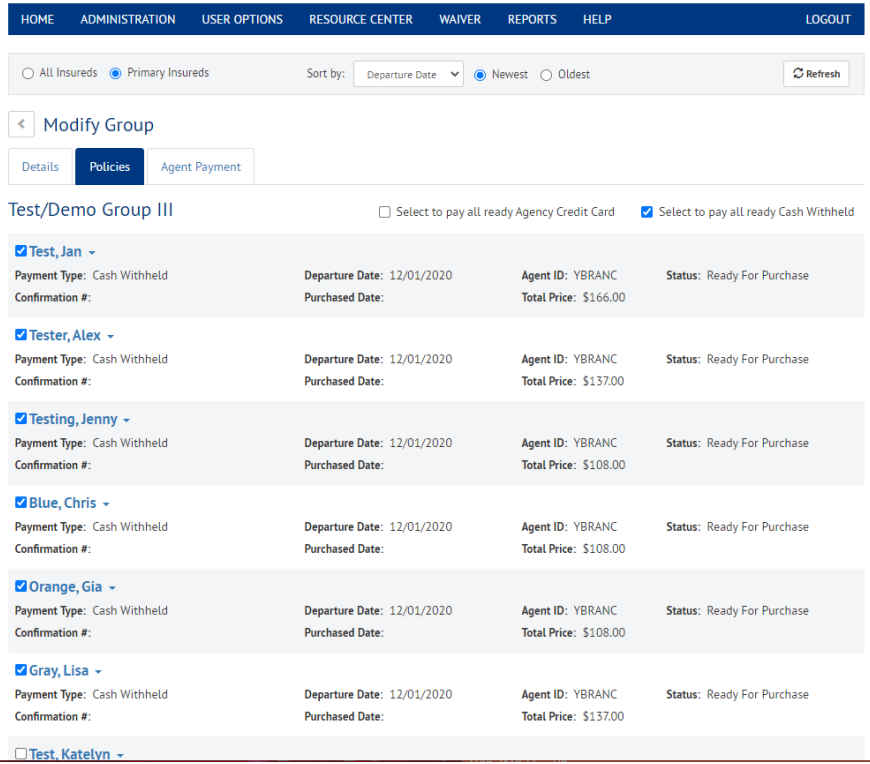
- The banner only remains in view for ten seconds and indicates success (or failure, when applicable).

© Copyright Allianz Partners

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.

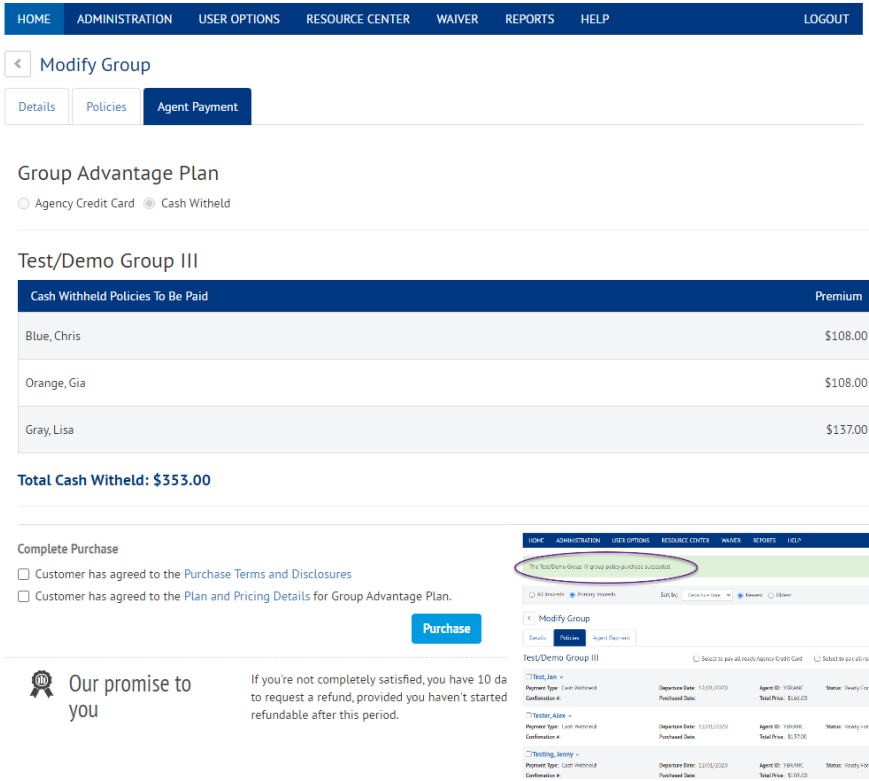


© Copyright Allianz Partners

AGENT PAYMENT
CASH WITHHELD

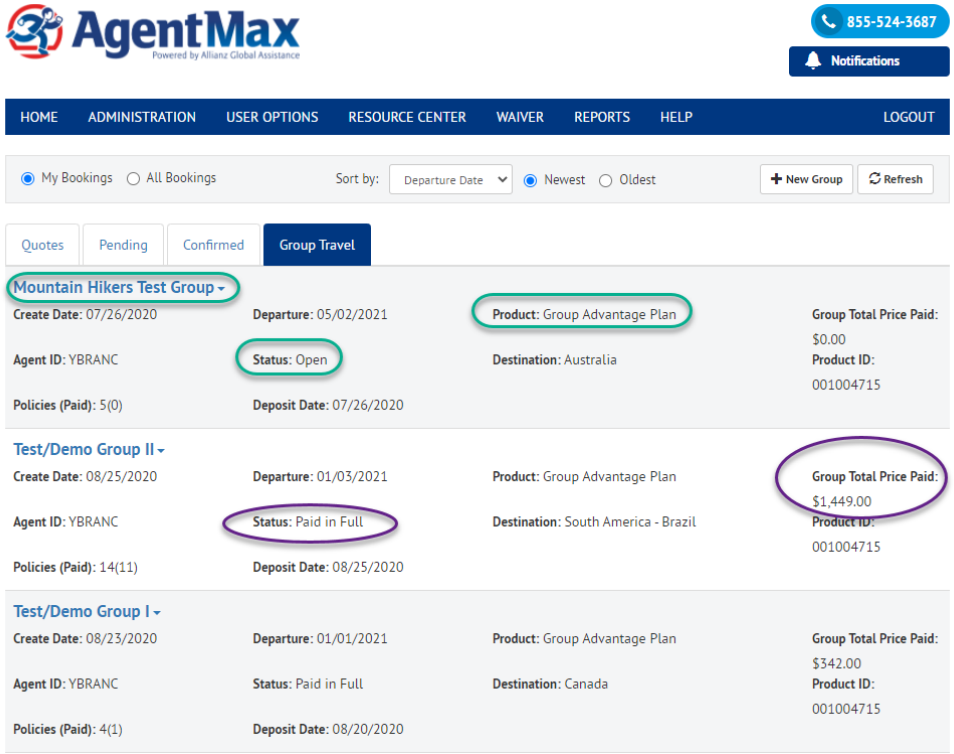
Once policies ready for purchase are selected and the *Pay Now* button is hit, you will be taken to the *Agent Payment* page.

- 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).



© Copyright Allianz Partners

GROUP TRAVEL
GROUP QUEUES – OVERVIEW



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

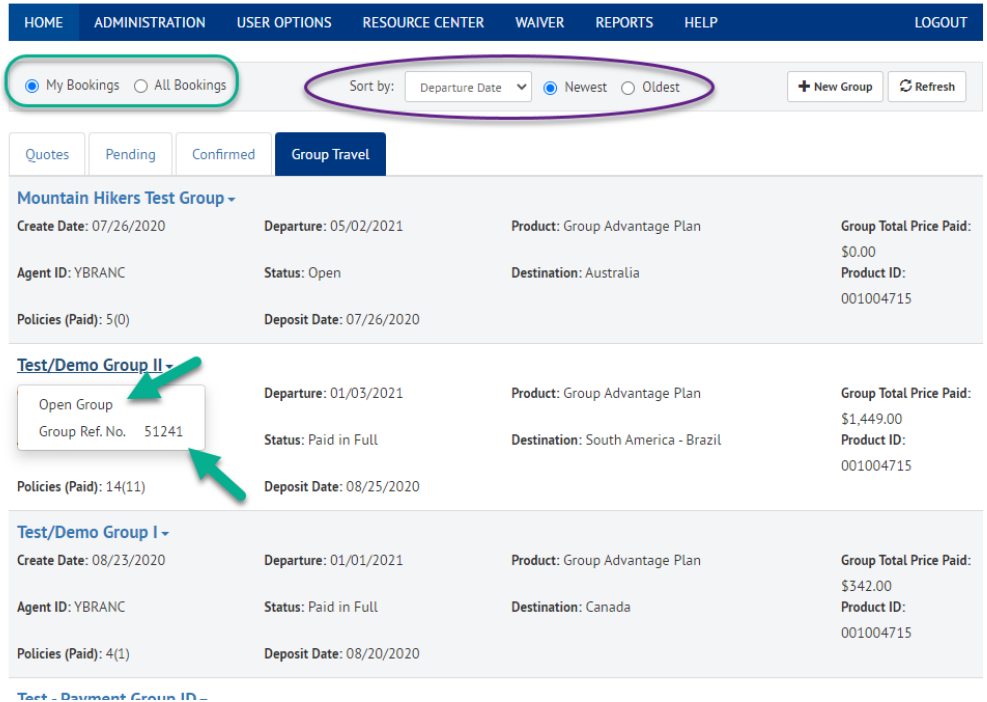
- The status of the group is available and updated in real-time (i.e. payments, travel dates) and when policies are confirmed, the total premium amount paid is also updated.
- The total number of records/policies within the group is displayed with the number of paid policies.
- At this time, groups cannot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

© Copyright Allianz Partners

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.

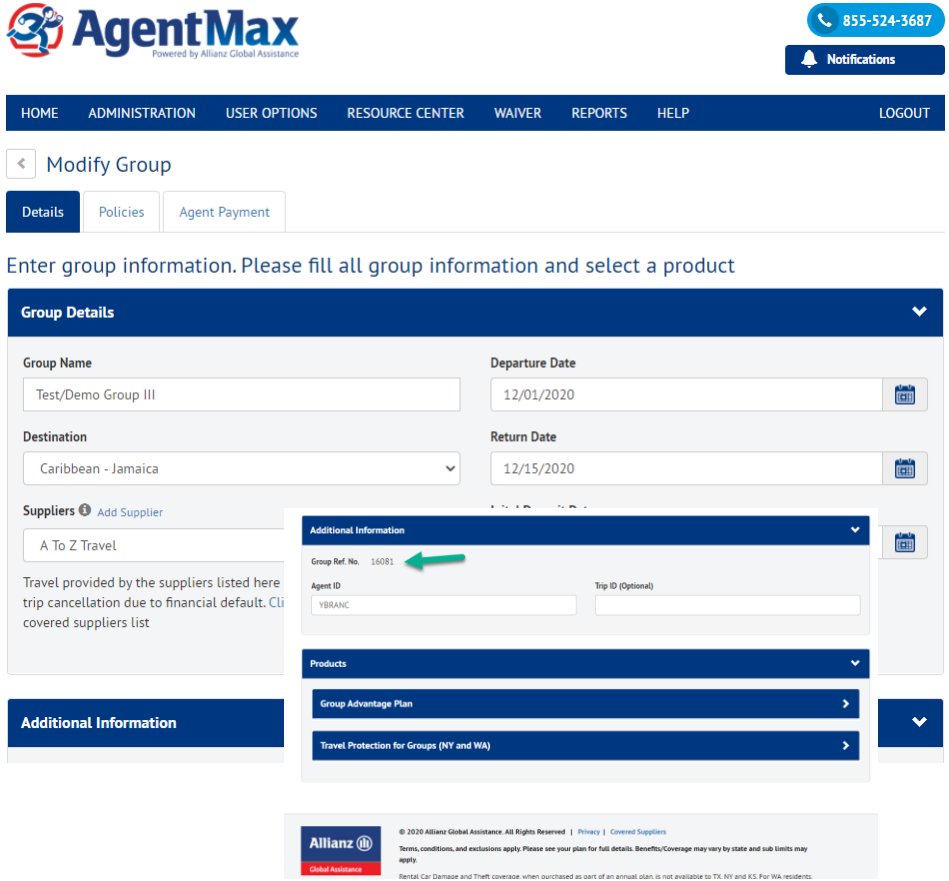


© Copyright Allianz Partners

GROUP TRAVEL
QUEUES – OPEN GROUP

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).



© Copyright Allianz Partners

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.

© Copyright Allianz Partners

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.

© Copyright Allianz Partners