



GROUP TRAVEL OVERVIEW GUIDE

The ability to sell to groups of travelers (large and small) is now available in AgentMax Online. For those agents that utilize the current feature in the desktop version, you can now start to migrate to AgentMax Online if this was holding you back.

If your agency/contract allows you to sell to groups then you will have this feature enabled in AgentMax Online. The Manage Groups button will appear on the homepage [screenshot]. This allows you to book and manage travel for groups. You simply start by building and naming your group and from there you can manage the travelers gradually or in a single setting – it is your choice! Maintain your group(s) by naming them based on trip title, group nicknames, or any method in which you like to organize them. In this booking method you can book travel for groups in a single transaction if you choose by way of uploading your list of travelers (see Excel template) or by adding individual travelers to your designated groups. Group Travel within AgentMax Online allows you to pay utilizing individual credit cards or agency credit cards in a single or multiple transactions.

QUICK TIPS:

- i** You can activate/deactivate notifications at agency and advisor administration levels (they must be activated at the agency level first)
- i** Notifications refresh after each AgentMax Online login and remain in your queue for 60 days (MaxMail and QuoteMax sales) or until the expiration date (Benefit Alerts)
- i** Updates are displayed for the agent currently logged into AgentMax Online

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GROUP CREATION

Easy access from the top-right corner of every page

Now, wherever you are in AgentMax Online, you'll notice a blue Notifications tab at the top of the page. A red dot will appear inside the tab when you have a new sale from MaxMail or QuoteMax, and also when a customer's eligibility for pre-existing conditions coverage is expiring soon.

POLICIES TAB

This section is where you add the travelers to your group and then select to manage those pre and post purchase. This is done by uploading a group traveler list (utilizing our template) or adding travelers individually. As a reminder if you plan to use a combination of these methods, please start your group with the upload first; then modify the group by adding individual travelers.

POLICIES CONFIRMATION

The Group Travel the purchase receipt or policy confirmation within AgentMax Online has been updated to include the Group Name.

GROUP TRAVEL QUEUE

This tab shows a list of all of the groups you have created. It provides a quick view of general details about the group such as group name and create date, group dates (if provided), destination information (if provided), payment status information, and more.

Allianz will assign a unique identifier to each group called a Group Ref ID, should you need it for troubleshooting or your own use. This ID will also be captured on the Policy Confirmation page within AgentMax Online upon viewing individual traveler policies.

Please reach out to your district representative for more information or a full training guide on the Group Travel feature within AgentMax Online or Agent Services.

Terms, conditions, and exclusions apply. Insurance benefits are underwritten by Jefferson Insurance Company (NY, Administrative Office: Richmond, VA), rated "A+" (Superior) by A.M. Best Co., under Jefferson Form No. 101-C series or 101-P series. 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 and an affiliate of Jefferson Insurance Company. Plans include insurance benefits and assistance services. 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 may be 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.

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