

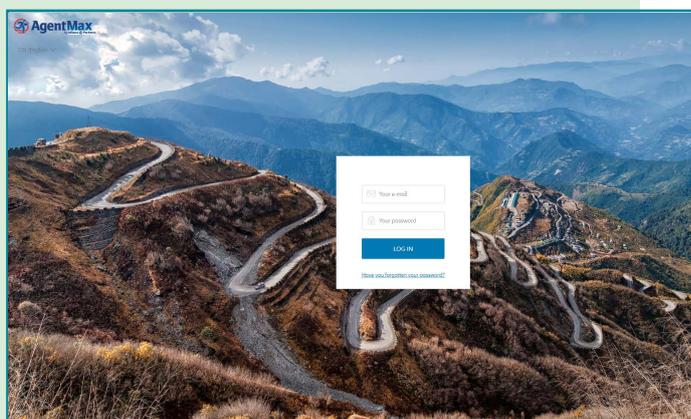
# QUICK GUIDE AGENT MAX

Status: November 2022

**Faster, more intuitive, more modern: our new insurance portal offers you comprehensive services for information and conclusion.**

## INSURANCE CONCLUSION IN 5 STEPS:

### LOGIN



Login

### LOGIN

You will receive your login data for AgentMax by e-mail. Your username is your e-mail address. Your password must consist of at least eight characters, a mix of upper and lower case letters, numbers, and special characters. The first time you log in, please change your password and set security questions. This is in case you forget your password and need to renew it. At "Forgotten password" you can then enter and confirm a new password after correctly answering the security questions.

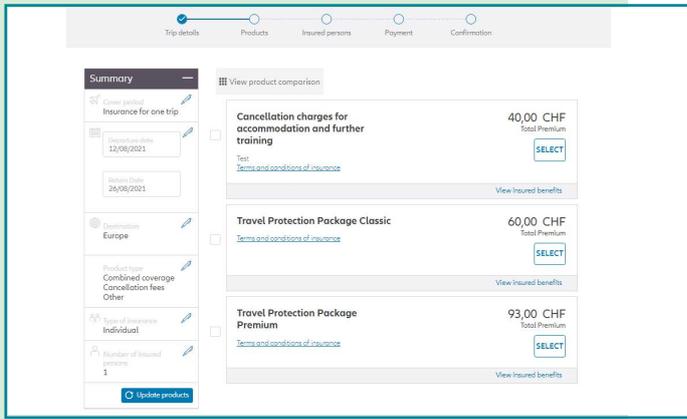
 Confirm language selection before each session in Agent Max (top left), even if correct language is already displayed

## BOOKING PROCESS

1) Entering the travel information

### 1. ENTRY OF TRAVEL INFORMATION

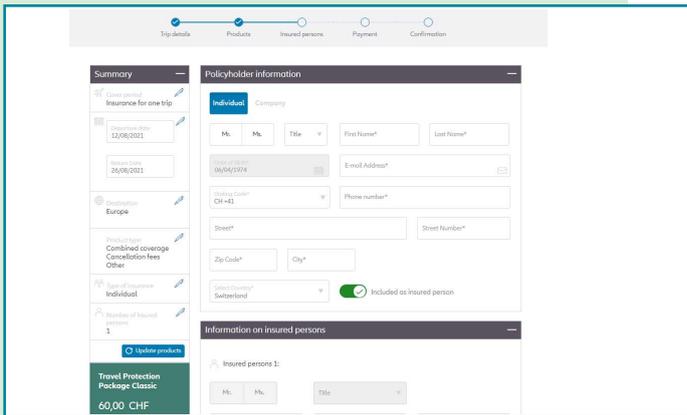
- Period of cover (annual/single insurance)
- Travel dates
- Destination (EU / Worldwide / Schengen)
- Product type
- Type of insurance
- Number of insured persons
- Age of insured persons
- Travel price



## 2) Selection of a product

## 2. SELECTION OF A PRODUCT

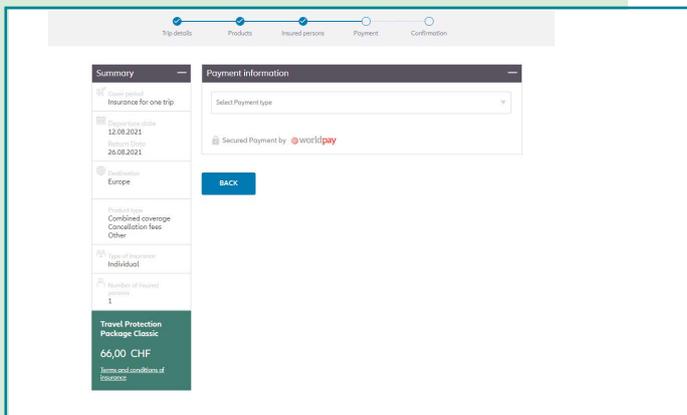
Our products are clearly displayed here. Select the product that best suits your customer. For each product, you can see the insurance amount, the scope of benefits, and the insurance conditions.



## 3) Enter personal data

## 3. ENTER PERSONAL DATA

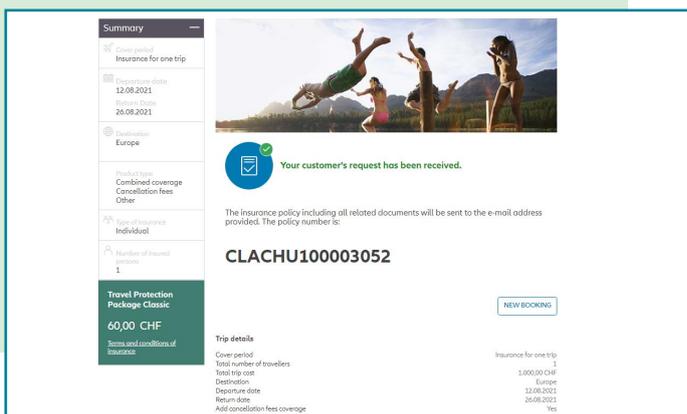
Enter the necessary information on the policyholder and all other insured persons here (incl. e-mail address, see point 5).



## 4) Payment

## 4. PAYMENT

To take out the insurance, confirm the insurance conditions. Then select the desired payment method, fill in the necessary information for the payment process and complete the process.



## 5) Confirmation

## 5. CONFIRMATION

The confirmation of the insurance contract is displayed in AgentMax. All associated documents (policy, insurance conditions, product sheet) are automatically sent to you and your customer by e-mail.

# AND THAT WILL ALSO PLEASE THEM

**Search for Policy**

to

to

Policy number	Policyholder	Purchase date	Policy start date	Insurance end date	Premium	Status	Product	Type	Sold by	Commission Recipient
	Test	24.03.21	24.03.21	24.03.22	CHF 0.00	Active	mc_CH_00001	Annual Insurance		
CLACHU200009010	Test David	09.03.21	09.03.21	28.03.21	CHF 94.00	Active	HK for State Einzel 50k 04/2018 - 50	Insurance for one trip	bitCH_INTERN AL	ICH00000
CLACHU20009011	Test David	09.03.21	09.03.21	28.03.21	CHF 132.00	Active	HK for State Familie 50k 04/2018 - 50	Insurance for one trip	bitCH_INTERN AL	ICH00000

## Search

## ADMINISTRATION

Select "Administration" in the navigation bar to get to the "Policy Search". You can search for an insurance policy according to the following criteria:

- Policy number
- Name of policyholder
- Type of insurance (annual / individual)
- Policy status
- Policy start date
- Conclusion date
- The search results are displayed in an overview. To see the details of a policy, simply click on the respective policy number in the search results.

**Policy details**

**Travel details**

Policy number: CLACHU200009010  
 Status: Active  
 Purchase date: 09.03.2021  
 Sold by: bitCH\_INTERN AL  
 Total Premium: CHF 235.00  
 Payment Frequency: N/A  
 Installment Amount: N/A  
 Payment method: Entrusted Collection  
 Commission Recipient: ICH00000  
 Last Modified on:  
 Last Modified by:

**Trip details**

Cover period: Annual Insurance  
 Product: Secure Trip Premium Individual  
 Destination: World  
 Departure date: 10.03.2021  
 Return Date: 09.03.2022  
 Type of insurance: Individual  
 Number of insured persons: 1  
 Total trip cost: 0,00 CHF

**Policyholder**

Solutation: Mr.  
 First name: Test  
 Last name: David  
 Date of birth: 01.01.1987  
 Street: Gordon Rd  
 Street number: 34  
 City: Essling  
 Zip code: 1001  
 Country: Suisse  
 E-mail address: @allianz.com

**Insured persons1**

Solutation: Mr.  
 First name: Test  
 Last name: David  
 Date of Birth: 01.01.1987  
 Trip cost: 0,00 CHF

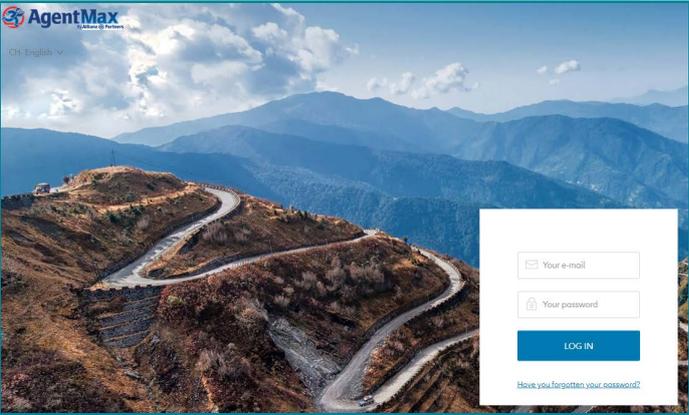
**Additional information**

## Modification and cancellation

## MODIFICATION AND CANCELLATION

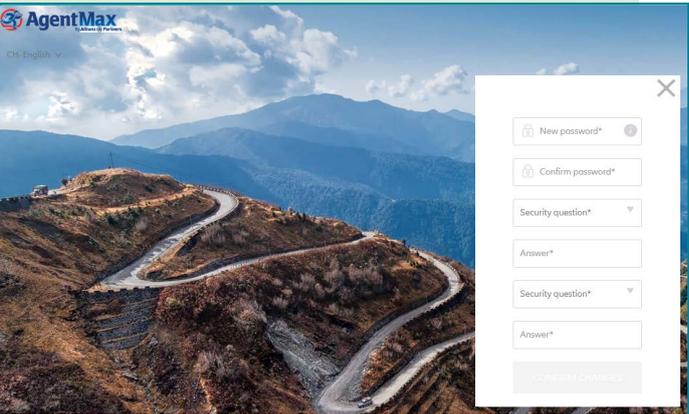
With AgentMax you can process existing insurance policies independently on the day they are taken out. If you want to cancel an insurance, click on "Cancel". If Allianz Partners has not yet triggered the invoice, only the cancellation will be confirmed. There is no credit advice. If, on the other hand, the invoice has already been issued, the credit note amount will also be shown on the cancellation. For subsequent changes that did not take place on the day of conclusion, please contact our Service Center at +41 44 283 32 22 or by e-mail at info.ch@allianz.com.

# INITIAL REGISTRATION / LOGIN:



## LOGIN

You will receive your login data for AgentMax by e-mail. Your user name is your e-mail address. Your password must consist of at least eight characters, a mix of upper and lower case letters, numbers and special characters.



## CHANGE PASSWORD

When you log in for the first time, please change your password and set security questions. This is in case you forget your password and need to renew it. After correctly answering the security questions, you can then enter and confirm a new password under "Forgotten password".

# ANNEXATION OF FURTHER USERS

It makes sense to create a separate user account for each employee to prevent misunderstandings when changing passwords or answering security questions. This also contributes to the stability and reliability of the system.

Please note that only one user account can be created per e-mail address.

If you use the same e-mail address for several offices, or if a user works in several offices at the same time, please contact our Service Centre on +41 44 283 32 22 or by e-mail at info.ch@allianz.com.

In this case, we will ensure by linking the respective accounts that it is possible to switch between the accounts via the settings tab.

**There are two types of users in AgentMax:**

## STANDARD USER

can query tariffs, issue policies and have access to policy administration in AgentMax.

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

Profile & Settings | My account | **Create a new account** | Security | Access management

Please enter the details required to create a new account.

A user account       Multiple user accounts

First name:

Last name:

E-mail address:

Partner number:

Agent ID (Optional):

Create a new account with admin rights

**Example installation for standard users without administrator rights**

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

Profile & Settings | My account | **Create a new account** | Security | Access management

Please enter the details required to create a new account.

A user account       Multiple user accounts

First name:

Last name:

E-mail address:

Partner number:

Agent ID (Optional):

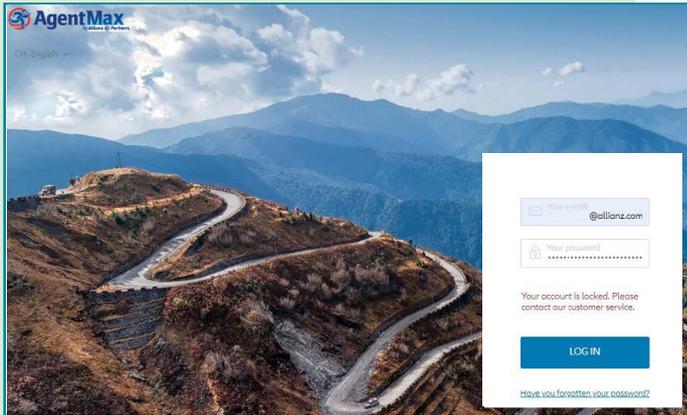
Create a new account with admin rights

**Example installation for users with administrator rights**

## USERS WITH ADMINISTRATOR RIGHTS

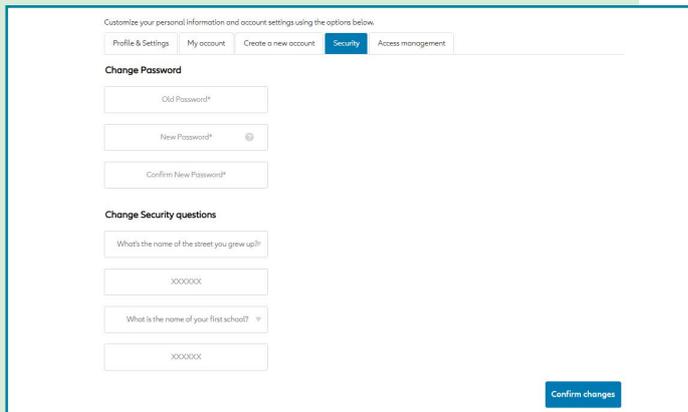
have the same rights as the standard users. In addition, further accounts can be created and deleted here via the user account management and, if necessary, unblocked.

# FAQ FOR LOGIN PROBLEMS



## WHAT DO I DO IF MY ACCESS HAS BEEN BLOCKED?

You probably did not change your password in time (after 120 days) or entered your password incorrectly several times. Please send an e-mail to [info.ch@allianz.com](mailto:info.ch@allianz.com). We will then activate your access. Please log in on the day of activation and change your password immediately afterwards. Otherwise your access will be blocked again. If you have not yet registered and have lost your activation email with password, we will be happy to send you another activation email with a new password to the email address you have provided.



## HOW / WHERE DO I UPDATE MY PASSWORD?

In AgentMax, click on the "Settings" tab and then on the sub-tab "Security" to access the area where you can change your password and, if necessary, the security questions.



## WHAT DO I DO IF I HAVE FORGOTTEN MY PASSWORD?

Please click in the login field of the AgentMax login page on "Forgot your password" and enter your email address (this must be the same as the email address you used to create your AgentMax account). You will now be asked to answer the security questions. Please then select a new password.

## WHAT DO I DO IF I HAVE FORGOTTEN THE SECURITY QUESTION?

Please send an e-mail to [info.ch@allianz.com](mailto:info.ch@allianz.com).

In this case, our service center will reset the account and send you new access data by e-mail. After logging in, please change your password and answer the security questions.

## I HAVE SO FAR FAILED TO REGISTER AND CAN NO LONGER FIND MY ACTIVATION EMAIL. WHAT CAN I DO?

Please send an e-mail to [info.ch@allianz.com](mailto:info.ch@allianz.com). In this case you will receive a new activation email with a new password. After logging in, please change your password and answer the security questions.

## CONTACT

If you have any questions about the new AgentMax portal or about our travel insurance in general, you can contact us at any time:

Phone: +41 44 283 32 22 (Monday - Friday, 8.00 a.m. - 6.00 p.m.)

E-mail: [info.ch@allianz.com](mailto:info.ch@allianz.com)