

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

Allianz (II) Partners



2) Selection of a product

Summary —	Policyholder information -
Tover period Insurance for one trip	Individual Company
Deporture date 12/06/2021	Ms. Ms. The v First None* Lost None*
Return Dote -26y08/2021	Obj04/1074 Errol Address*
Destrution	Childra Codet V CH +41 V Phone number*
Product type Combined coverage Cancellation fees Other	Street* Street Number*
An Type of Insurance 🖉	Select Country" V Selection for the selection of the sele
Number of insured Persons	Information on insured persons -
C Update products Travel Protection Package Classic	Insured persons 1: Ms. Title w

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

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

3) Enter personal data

Trip details	Products Insured persons Payment Confirmatio	1
Summary —	Payment information	-
Cover period Insurance for one trip	Select Payment type	w.
Departure date 12.08.2021 Return Date 26.08.2021	Secured Payment by @worldpay	
Destination Europe	BACK	
Product type Combined coverage Cancellation fees Other		
Type of insurance Individual		
Aumber of insured persons		
Travel Protection Package Classic		
66,00 CHF		
Terms and conditions of insurance		

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.

4) Payment



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.

5) Confirmation

AND THAT WILL ALSO PLEASE THEM

0.0					A					1. 1. 1		
Poucy nu	nber				First name of po	ucynolder			Last M	ame or pourcyn	older	
Cover per	lod		Ŧ		Policy status Active			1	Produc	t nome		
Insurance St Date:	art DD/	мм/үүүүү	60	to	DD/MM/YYYY				Partne	rname		
Purchase da	te DD/	ммулллл	=	to	DD/MM/YYYYY				Portne	r number		
											SEARCH	
											EXPORT	
Policy number	Policyholder	Purchase date	APolicy dat	Start e	Insurance end date	Premium	Status	P	oduct	Type	Sold by	Commissi Recipier
	Test ETCollection	24.03.21	24.03	.21	24.03.22	CHF 0,00	Active	mc_C	H_00001	Annual		
CLACHU1000 03003	Test David	09.03.21	09.03	.21	28.03.21	CHF 94,00	Active	HK f	ür Göste zel 50K 018 - 5.0	Insurance for one trip	bttCH_INTERN AL	ICHOOOD
			00.00	31	28.02.24	CHE 122.00	Artise	HK	ir Görte	Insurance for	HICH INTERN	100000

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.

Travel details						
Policy number	CLACHU200003010	16				
Status	Active	view insurance policy				
Purchase date	09.03.2021					
Sold by	bttCH INTERNAL	Commence of the second second second second second second				
Total Premium	CHE 235.00	View the general terms and conditions of insurance (GT				
Pourment Ereculancy	NI/A	view the general terms and contrations of insurance (or c)				
I dyment requercy	14/6					
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					
Dertion	Mining a second many many dubit					
Deservation data	v/orid					
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					
Palisyholder						
Policyholder						
Policyholder Solutation	Mc					
Policyholder Solutation First name	Mr. Test					
folicyholder Solutation First name Last name	Mr. Test Dovid					
Velicyholder Solutation First name Last name Date of birth	Ms. Test Dovid 0.0.1967					
olicyholder Solutation First nome Last nome Date of birth Street	Mr. Test Dovid 01.01.1987 Gordon Rd					
Veligholder Solution First nome Last nome Date of birth Street Street mumber	Mc. Test Devid 0.0.1997 Gordon Rd 34					
olicyholder Salutation Firstname Lastname Date of birth Street Street Street Gly	Mr. Test David 01.01.1987 Gordon Rd 34 Ealing					
Volicyholder Selutation Flort nome Last nome Date of birth Street Street Street Street under City Zip code	Me. Text Dovid 0.0.1397 Gordon Rd 34 Eoling 1001					
bilgholder Solutation Fistname Last nome Date of Ditti Street Street untober Zip ande Country	Mr. Test Dovid 010.1967 Gordon RJ Ealing 1001 Svise					
Folicyholder Solutation Fint name Last name Date of birth Street Street Street Chy Zip code Cap Code Construction Construc	Mr. Test Dovid 0.0.1097 Gordon Rd Ealing Ealing 101 so 'gealloncom					
Volicyholder Solutation First name Last name Date of birth Street Street turber Of prodo Country E-mail address naurd persons1	Mr. Test Dovid Gordon Rd Elag Elag Sotase * @ellion.com					
Volicyholder Soliatatan Fint name Last name Date of birth Street Date of birth Street under City Zip code Country E-mail oddress maured persons1 Soliatation	Mc. Test Devid 0.0.1.997 Gordon Rd 34 Eoling 1001 Suisse ' v@elilonz.com					
tolicyholder Solutation Fistname Lastname Date of birth Street Street unuber Street unuber Street unuber Street unuber Statode Caustry E-mail address sured penanal Solutation Fistname	Mr. Test Dovid 010.1967 Gordon Rd I Solase ' @elilion.com Mr. Test					
Volicyholder Solutaton Fich nome Date of birth Street Date of birth Street City Zip code Country E-mail coddress Insured pernons Solutation Fick nome Last nome	Mc. Test: Dovid 0.0.1.097 Gordon Rd 34 Eoling 1001 Svisse ' v@atilionz.com Mc. Test: Dovid					
Folicyholder Soluation Fint nome Last nome Date of birth Street Street turber Chy Zip code Cause Final coddress Fundi coddress Fundi coddress Fint nome Last nome Last nome Last nome	Mr. Test Dovid 0.0.1097 Gordon Rd Saling 1001 Salise ' @allionz.com Mr. Test Dovid 0.0.1097					
Volicyholder Solutation Fint name Date of birth Street Date of birth Street Street unber City Zip code Caurty Zip code E-mail coddress Final name E-mail coddress Solutation Fint name Lost name Date of Birth Ty post	Me, Test David 0.0.1987 Gordon Rd Ealing 1001 Suise ' @allianz.com Me, East David 0.10.1987 0.00 CHF					
Policyholder Solutation Fichr anne Last anne Date of birth Street Date of birth Street Country E-mail codress Street number Country E-mail codress Subtation Fichr anne Last anne Date of Birth Trip cost	Me, Test Dovid 01.0.1987 Gordon Rd 34 Eoling 1001 Svisse * @elilonz.com Me, Test Dovid 01.0.1.1987 0,00 CHF					
Voligholder Solutation Fint name Last name Date of birth Street Date of birth Street unwher Cuty Zip code Country E-mail coddress Named persons1 Solutation Fint name Last name Date of Birth Trip cost ddtional Information	Mc Test Dovid 0.0.1.987 Gordon Rd 34 Eoling 1001 Svisse ' v@elilon.com Mc Test Dovid 0.1.0.1.987 0.00 CHF					

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.

Profile & Settings	My account	Create a new account	Security	Access monogement	
Please enter the deta	ils required to cre	ate a new account.			
Ä					
A user account		Multiple user account	5		
First name					
Last name					
E-mail address					
Portner number					
Agent ID (Optional)					
Agencio (optional)					

There are two types of users in AgentMax:

STANDARD USER

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

Example installation for standard users without administrator rights

Pronte & Secongs	My account	Create a new account	Security	Access management	
Please enter the detai	ls required to crea	ate a new account.			
8					
A user account		Multiple user account	5		
First name					
Last name					
E-mail address					
Partner number					
Agent ID (Optional)					

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. 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.

Cutorities your promotile information and account statings using the option below. Information Charge Posseeroit Old Plasment¹ Mere Passeeroit¹ Confirm New Passeeroit¹ Confirm New Passeeroit¹ Maria the norme of the street your grow coll¹ Moderation of your first scheet¹ Soccoox What is the norme of your first scheet¹ Soccoox

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.

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. 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



09-2021