

AIG/TRAVEL GUARD INSURANCE INTEGRATION WITH AGENTMATE

USER GROUP:

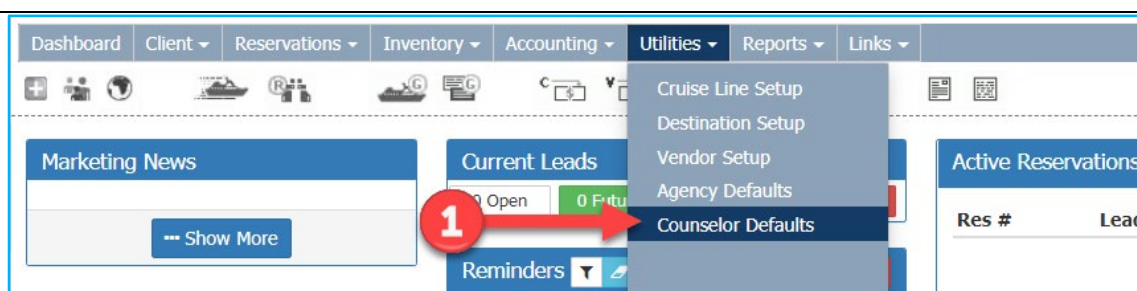
AgentMate users with AIG Travel Guard Integration

SUMMARY:

Guide to setup integration and add insurance line items in a reservation

SETUP:

1. Navigate to *Utilities>Counselor Defaults*
2. Click on **Integrations**
3. Scroll down to the **Links** section and select the **Insurance** radio button
4. Highlight **Travel Guard Insurance**
5. Enter username and password and click **Save**



Dashboard Client Reservations Inventory Accounting Utilities Reports Links

Marketing News

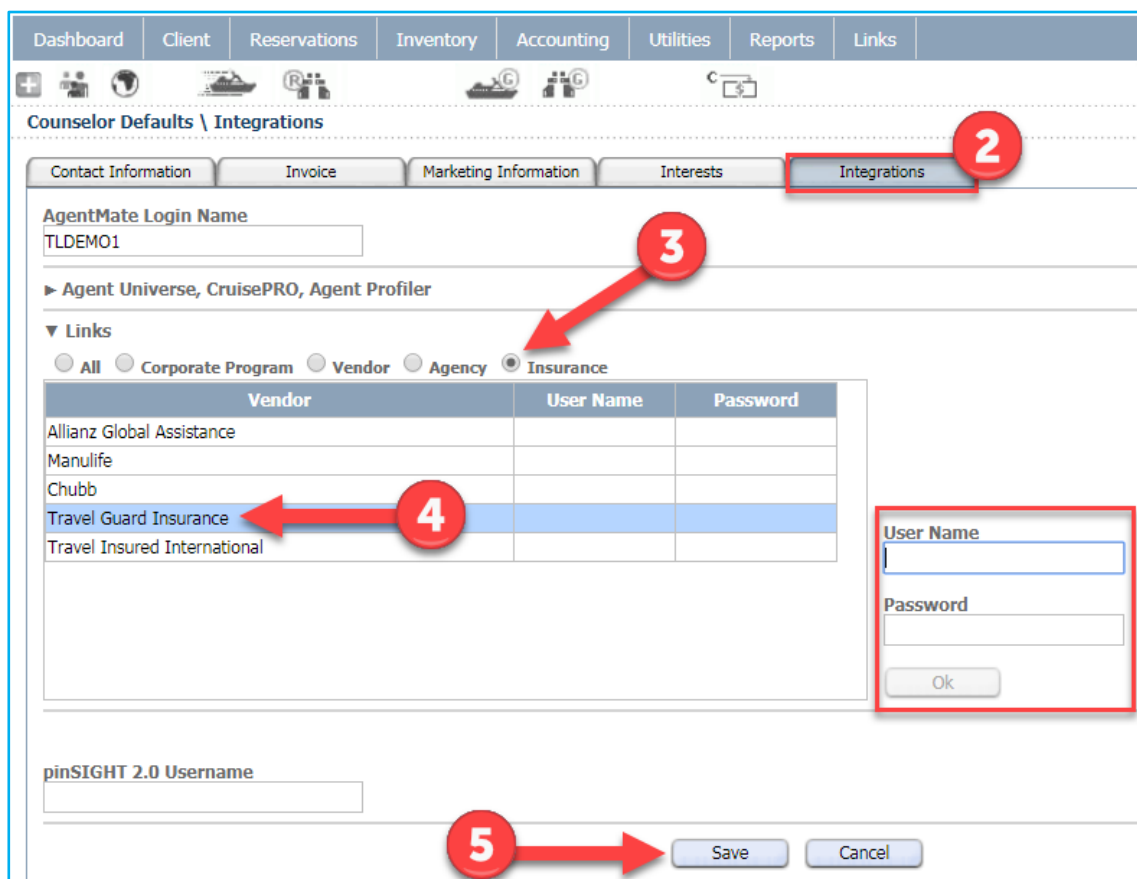
Current Leads

Reminders

Active Reservations

Res # Lead

1



Dashboard Client Reservations Inventory Accounting Utilities Reports Links

Counselor Defaults \ Integrations

Contact Information Invoice Marketing Information Interests Integrations

AgentMate Login Name

TLDEMO1

Agent Universe, CruisePRO, Agent Profiler

Links

All Corporate Program Vendor Agency Insurance

Vendor	User Name	Password
Allianz Global Assistance		
Manulife		
Chubb		
Travel Guard Insurance		
Travel Insured International		

pinSIGHT 2.0 Username

User Name

Password

Ok

Save Cancel

2

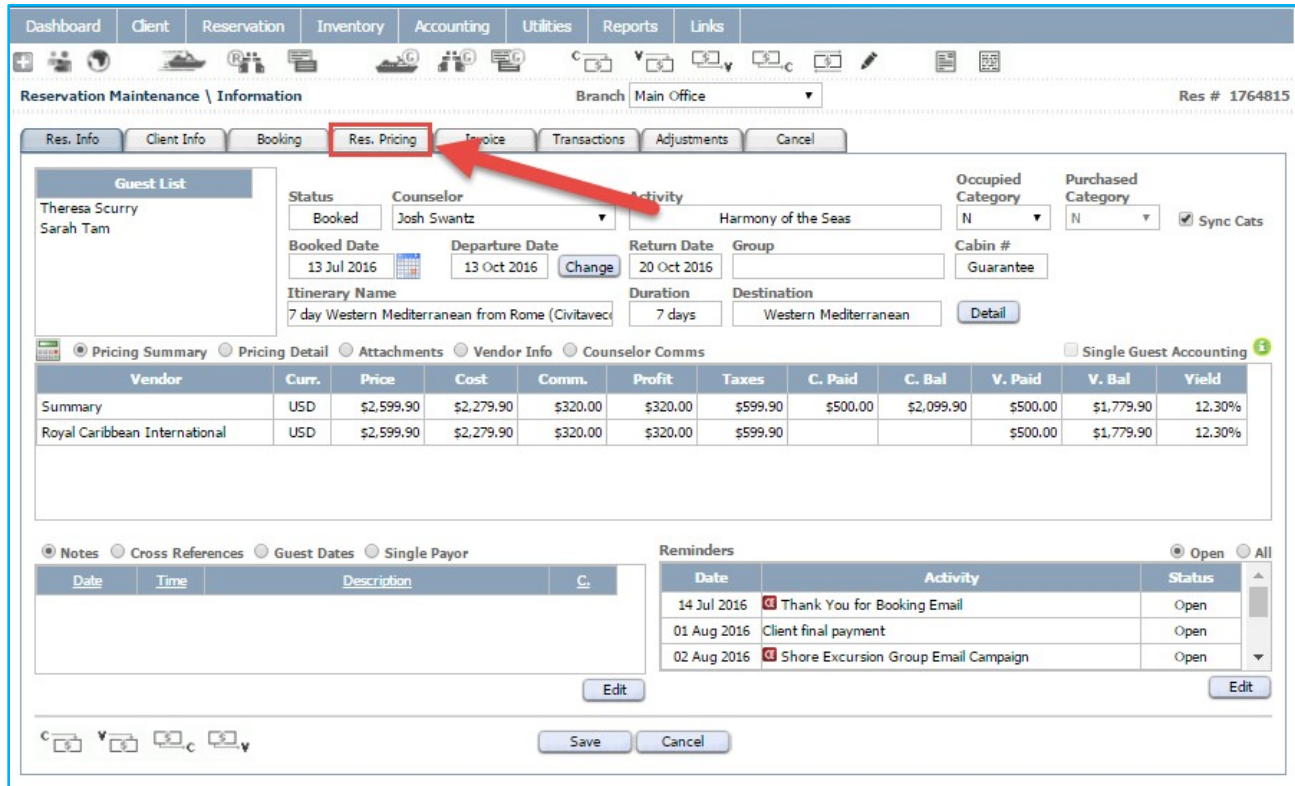
3

4

5

ADD INSURANCE LINE ITEM TO RESERVATION

- Open Reservation and click on Res Pricing



Reservation Maintenance \ Information Branch: Main Office Res # 1764815

Res. Info Client Info Booking **Res. Pricing** Invoice Transactions Adjustments Cancel

Guest List: Theresa Scurry, Sarah Tam

Status: Booked Counselor: Josh Swantz Activity: Harmony of the Seas Occupied Category: N Purchased Category: N Sync Cats: ☒

Booked Date: 13 Jul 2016 Departure Date: 13 Oct 2016 Return Date: 20 Oct 2016 Group: Cabin #: Guarantee

Itinerary Name: 7 day Western Mediterranean from Rome (Civitavecchia) Duration: 7 days Destination: Western Mediterranean Detail

Pricing Summary Pricing Detail Attachments Vendor Info Counselor Comms Single Guest Accounting

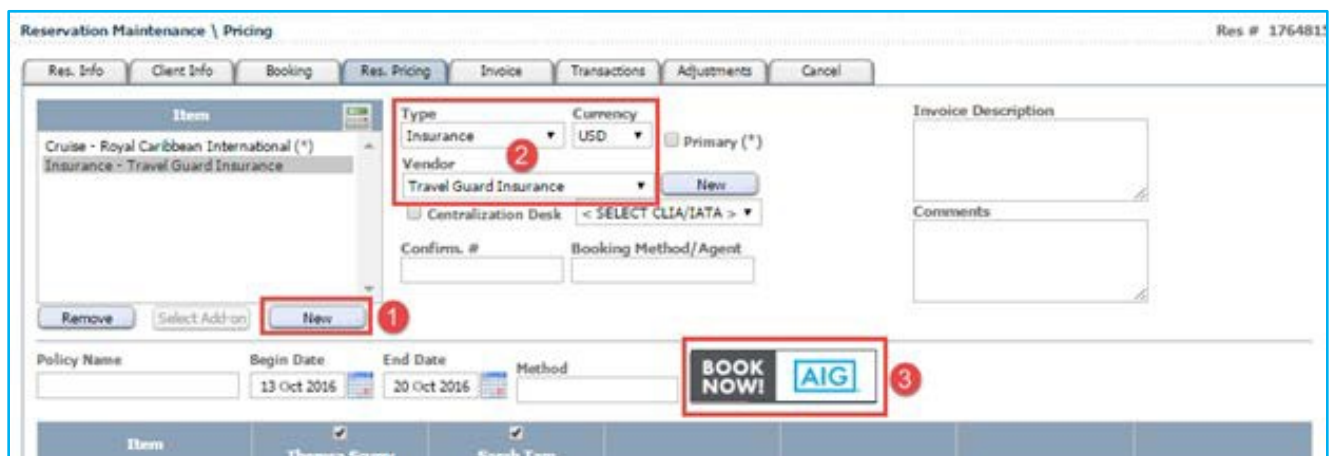
Vendor	Curr.	Price	Cost	Comm.	Profit	Taxes	C. Paid	C. Bal	V. Paid	V. Bal	Yield
Summary	USD	\$2,599.90	\$2,279.90	\$320.00	\$320.00	\$599.90	\$500.00	\$2,099.90	\$500.00	\$1,779.90	12.30%
Royal Caribbean International	USD	\$2,599.90	\$2,279.90	\$320.00	\$320.00	\$599.90			\$500.00	\$1,779.90	12.30%

Notes Cross References Guest Dates Single Payor Reminders

Date	Time	Description	C.
14 Jul 2016	04	Thank You for Booking Email	Open
01 Aug 2016		Client final payment	Open
02 Aug 2016	04	Shore Excursion Group Email Campaign	Open

Save Cancel

- Click on **New**.
- Select **Insurance** under **Type** and **Travel Guard Insurance** under **Vendor**
- Click on **Book Now**



Reservation Maintenance \ Pricing Res # 1764815

Res. Info Client Info Booking Res. Pricing Invoice Transactions Adjustments Cancel

Item: Cruise - Royal Caribbean International (*), Insurance - Travel Guard Insurance

Type: Insurance Currency: USD Primary (*): ☐

Vendor: Travel Guard Insurance New

Centralization Desk: < SELECT CLIA/IATA >

Confirms. #: Booking Method/Agent

Remove Select Add-on **New** 1

Policy Name: Begin Date: 13 Oct 2016 End Date: 20 Oct 2016 Method: **BOOK NOW!** **AIG** 3

Item: Theresa Scurry Sarah Tam

- The Travel Guard pop up will show the prepopulated DOBs and price per person. Click OK

BOOK NOW! - Travel Guard Insurance

	Passenger Name	Birth Date	Agency Price
☒	Theresa Scurry	05 Mar 1986	\$1,299.95
☒	Sarah Tam	05 Mar 1986	\$1,299.95



Begin Date

13 Oct 2016

End Date

20 Oct 2016

Total **\$2,599.90**

- Select the policy

BOOK NOW! - Travel Guard Insurance

Policy Code	Policy Name	Policy Description	Benefits	Price Type	Passenger Price	Total Price
NW6700	Plan Nationwide Gold	Details	Details		\$52.00	\$111.00
009027	Plan Nationwide Choice Plus (except MT)	Details	Details		\$61.00	\$129.00
NW6600	Plan Nationwide Platinum	Details	Details		\$86.00	\$179.00
NW7838	Plan Nationwide Basic	Details	Details		\$41.00	\$89.00
NW8838	Plan Nationwide Silver	Details	Details		\$42.00	\$91.00

- On the final screen, the client's credit card will populate. You will be able to lookup or add another card within the client profile. The client's email and address will also populate from their profile.
- Select the **Fulfillment Method** of either **Email** or **Regular Mail** for the policy.
- Check the **Terms and Conditions** box and click **OK**.

Note: The policy fee is automatically added to the first passenger of the policy.

- The completed policy will appear with the imported confirmation number from Travel Guard along with the policy name, begin/end date, and pricing

Reservation Maintenance \ Pricing Res # 1764815

Res. Info Client Info Booking Res. Pricing Invoice Transactions Adjustments Cancel

Item

Cruise - Royal Caribbean International (*)

Insurance - Travel Guard Insurance

Type Insurance Currency USD Primary (*)

Vendor Travel Guard Insurance New

Centralization Desk < SELECT CLIA/IATA >

Confirm. # 700010378 Booking Method/Agent

Invoice Description

Comments

Remove Select Add-on New

Policy Name Plan Nationwide Gold Begin Date 13 Oct 2016 End Date 20 Oct 2016 Method IMPORTED

Item	Theresa Scurry	Sarah Tam				
Brochure price						
Vendor price	\$52.00	\$52.00				
Agency price	\$52.00	\$52.00				
Markup / Discount	\$0.00	\$0.00				
Commission %	37.00%	37.00%				
Cost	\$32.76	\$32.76				
Commission \$	\$19.24	\$19.24				
Profit	\$19.24	\$19.24				
Policy Fee	\$7.00					
Gov't fees & taxes						