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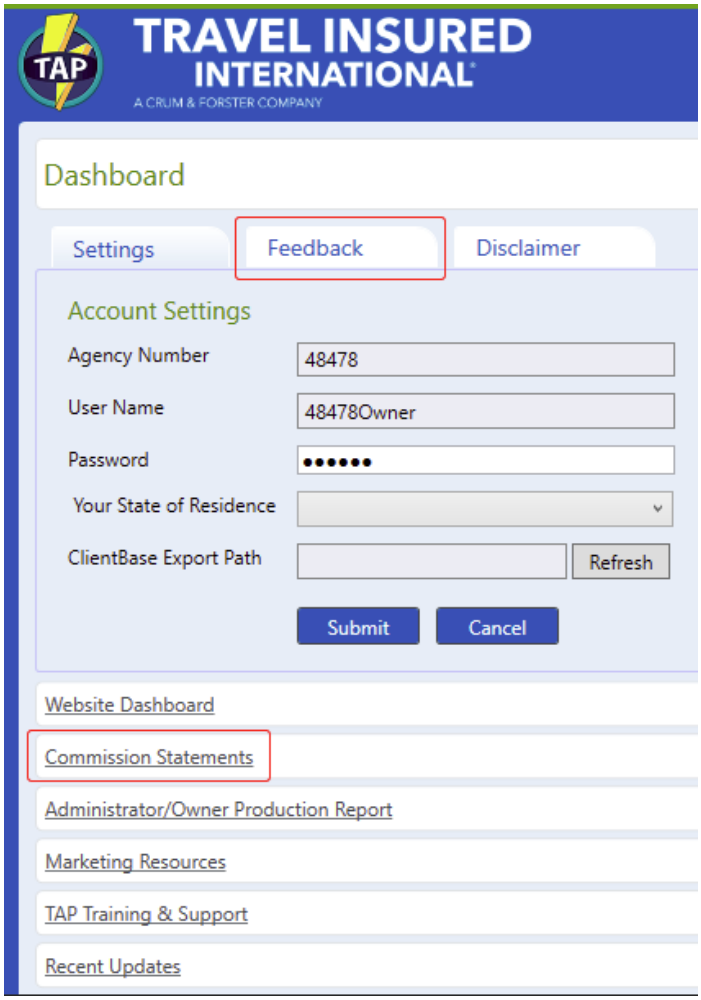
Travel Insured Agent Portal

TAP Overview & Workflow

NOTE: TAP is currently not available to Mac users.

If you're installing TAP for the first time, the program will open to the TAP **Dashboard** where you should enter your Travel Insured login credentials then click Submit. The TAP software application will reside on your desktop and remain in "Quick Quote" mode on the home screen.

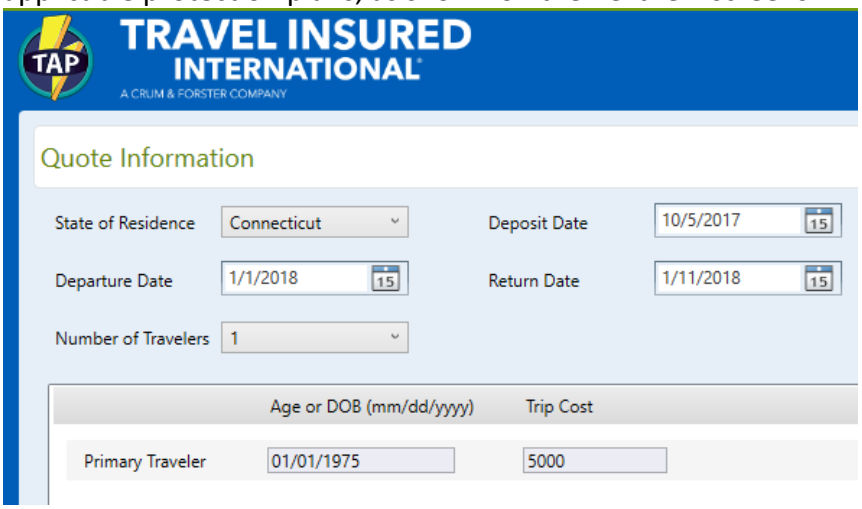


The **Feedback** tab will allow you to let Travel Insured know what you do and do not like about TAP. We value your comments!

On the TAP Dashboard, agency owners/administrators will be able to easily view **Commission Statements**. The link will bring you right to our Agent Dashboard to access the statements.

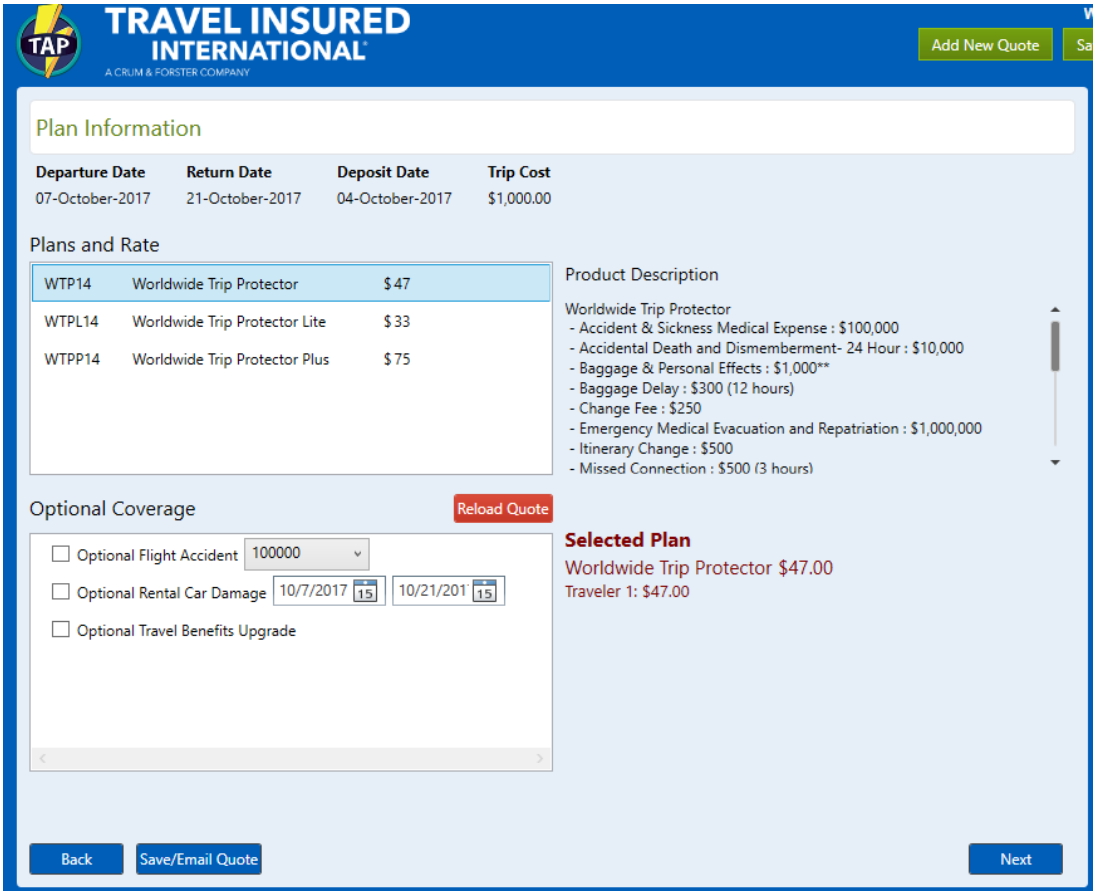
Getting a Quote

It's very important to input the correct *State of Residence* because of regulatory state changes. Once you enter the necessary data for a quote, click the **"Get Quote"** button to retrieve a list of applicable protection plans, as shown on the next few screens:



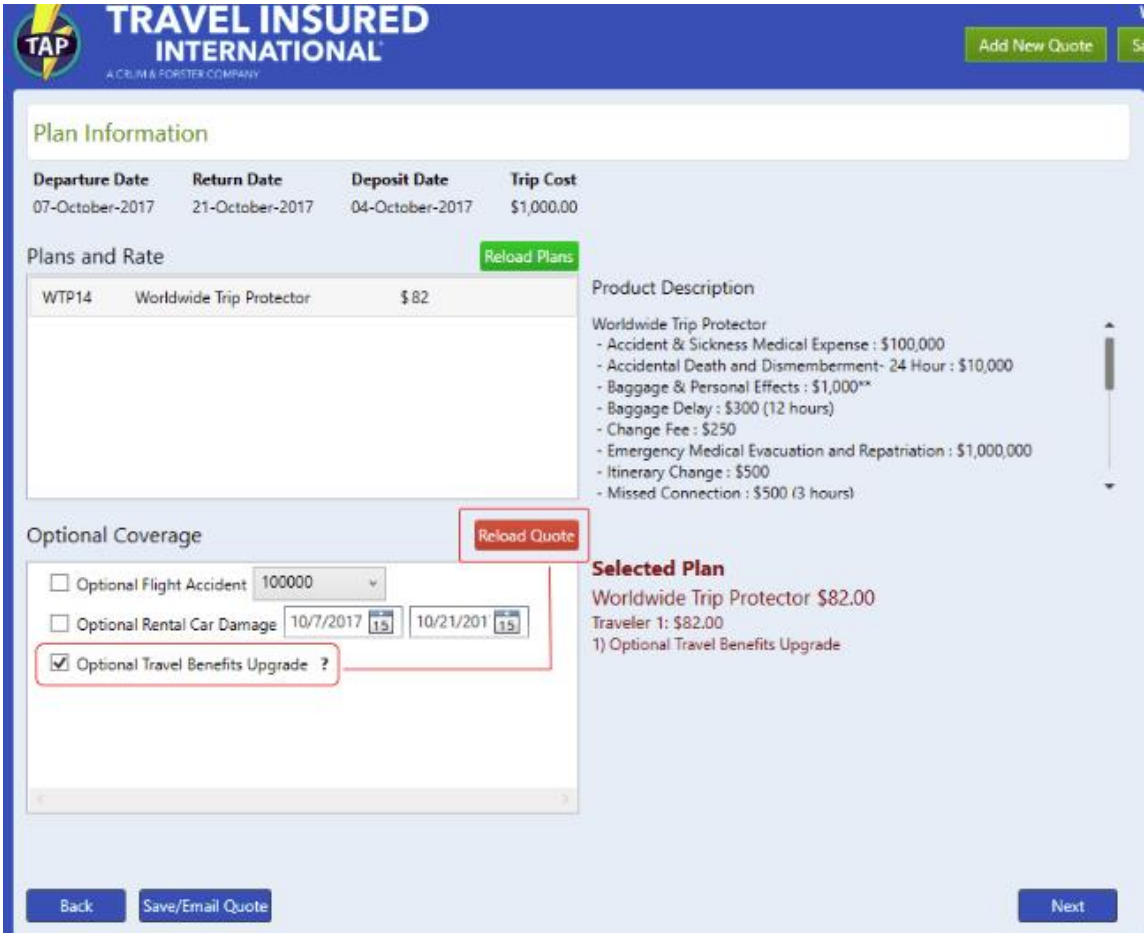
Plans are displayed, and as you select each one, the Product Description changes on the right.

NOTE: The benefits listed under Product Description are listed in alphabetical order.



Adding Optional Coverage:

Select your optional coverage and then click the Reload Quote button for pricing.

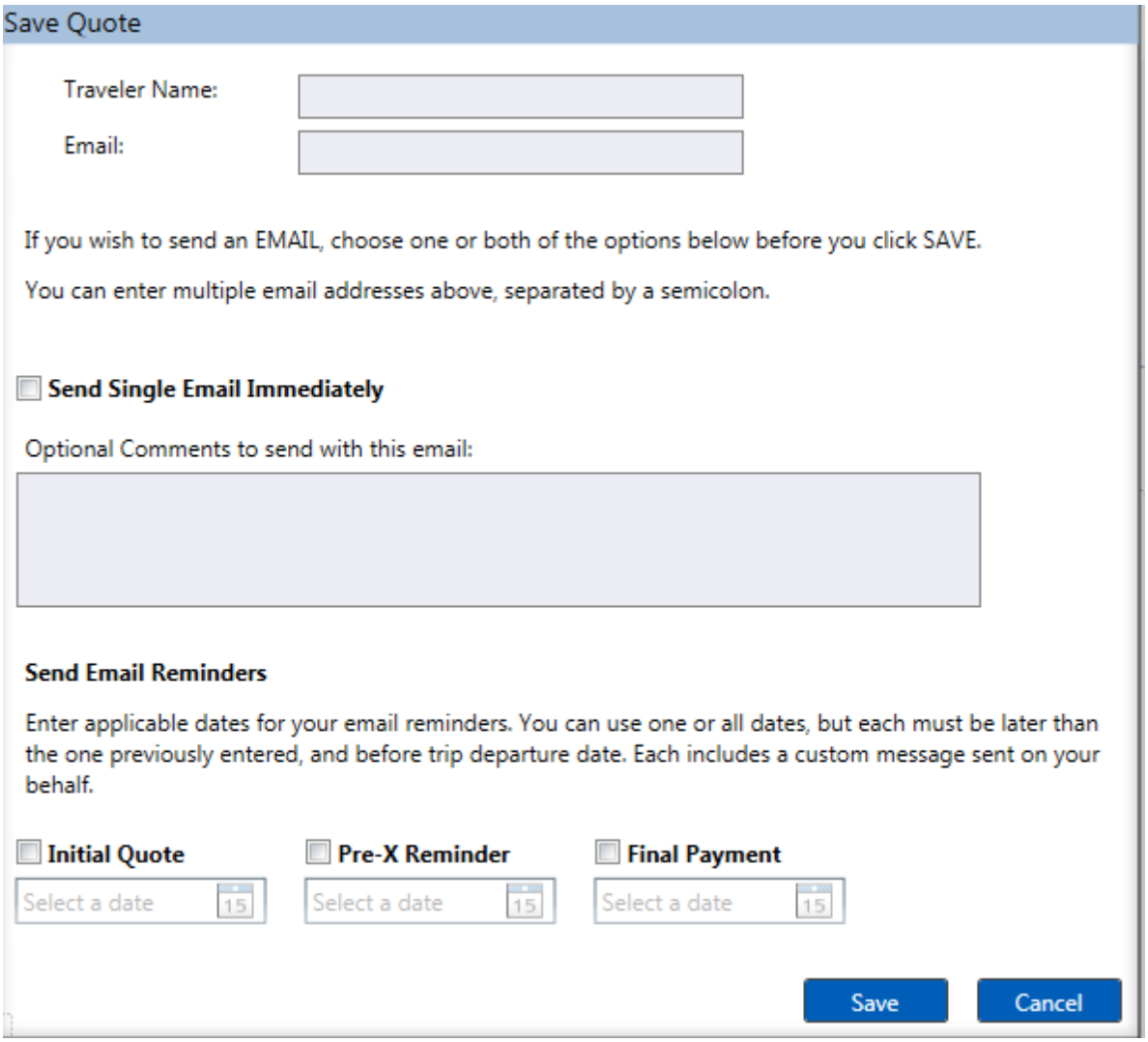


Make sure your Optional Coverage is added to the pricing summary displayed on the right before proceeding to the next step.

Once you have the plan you wish to save, click the **"Save/Email Quote"** button at the bottom of the page.

Save/Email Quote:

You only need a customer name and email to save your quote. You also have the option to send an immediate email or email reminders (3 Opportunities) as shown in the screenshot here:

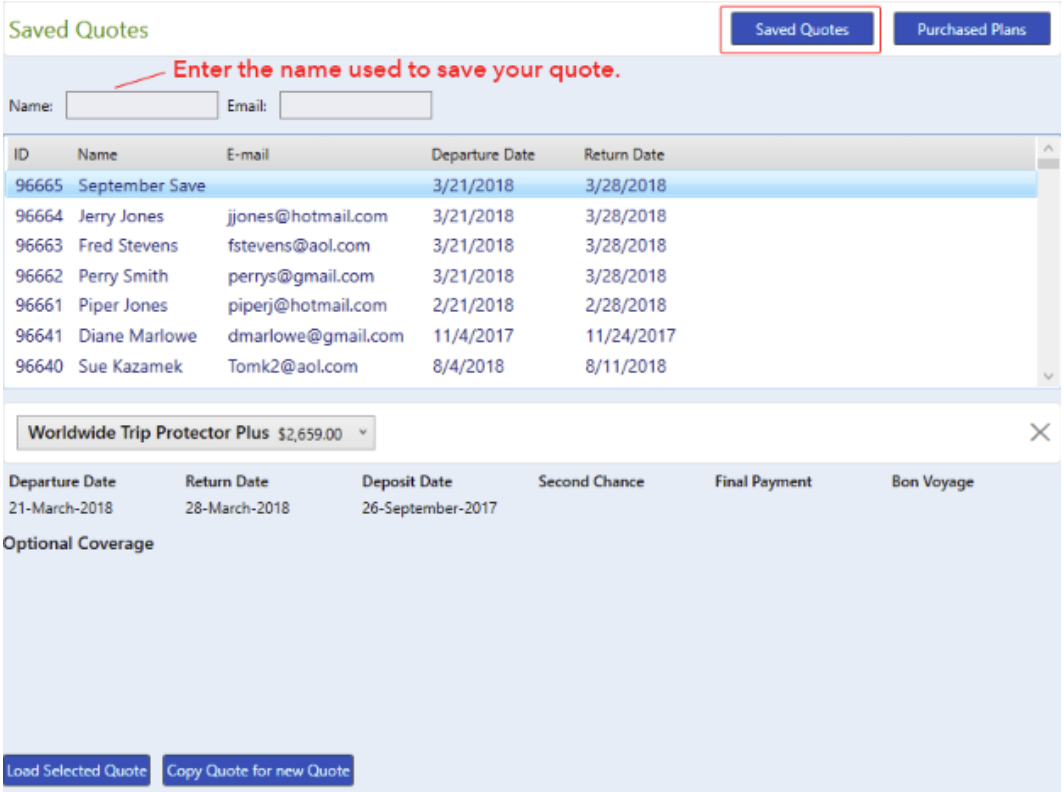


Once your quote is saved, you will receive a confirmation message from the Travel Insured server.

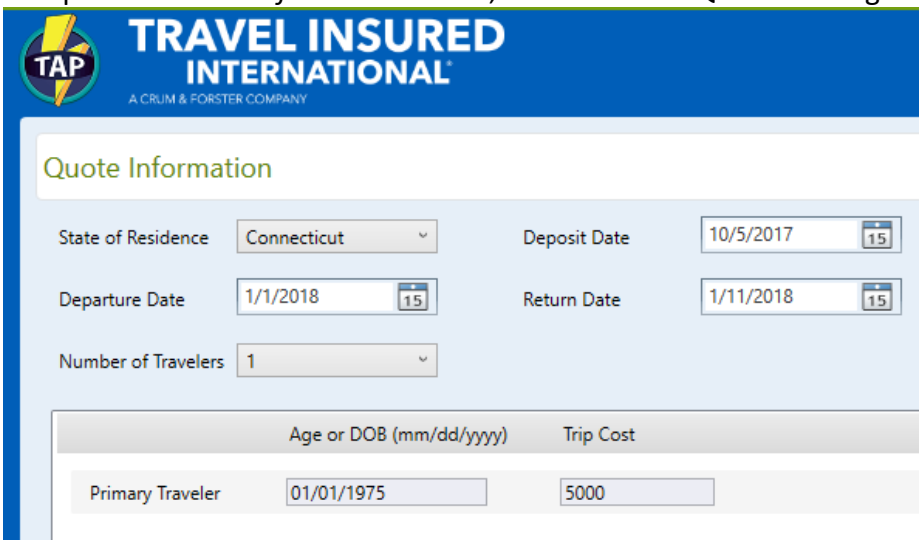
Retrieving a Saved Quote:

To find this quote in TAP, click on the **"Saved Quotes & Plans"** button at the top right of the screen.

Find the saved quote and select it. Click the **"Load Selected Quote"** button at the bottom left of this screen, to see how easy it is to purchase this plan.

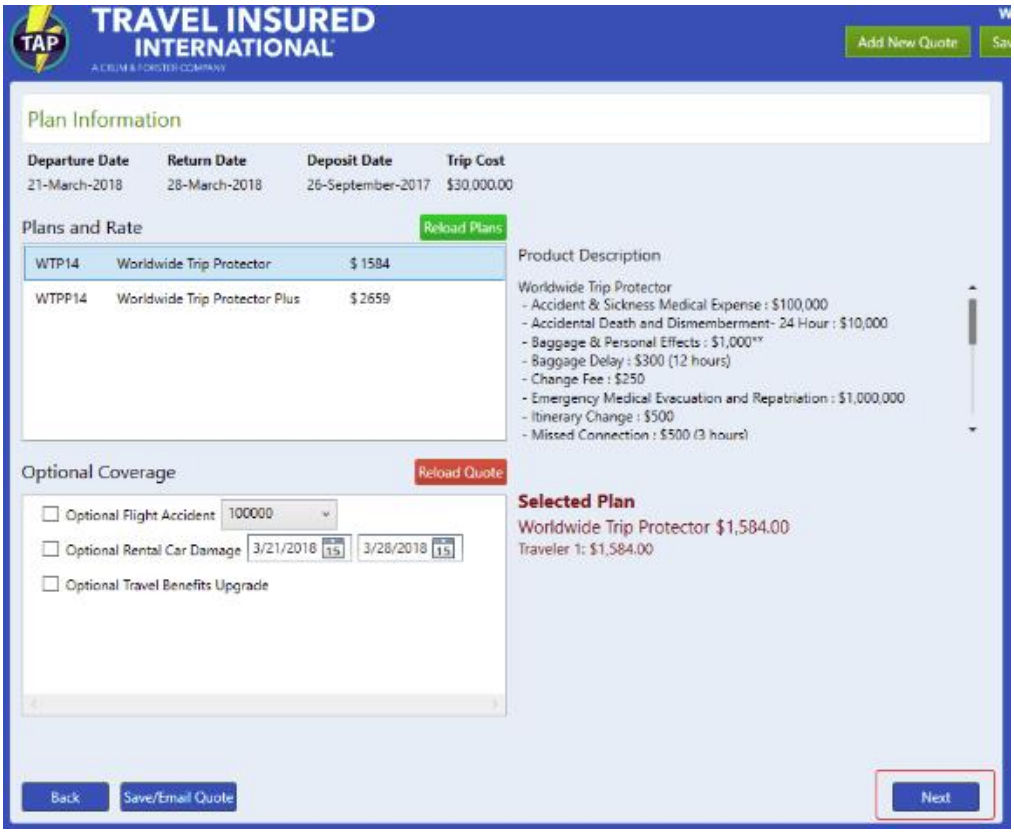


Complete the *State of Residence* field, and click **"Get Quote"** to begin the purchase process:



TAP displays the plan and optional coverage selected in the original saved quote.

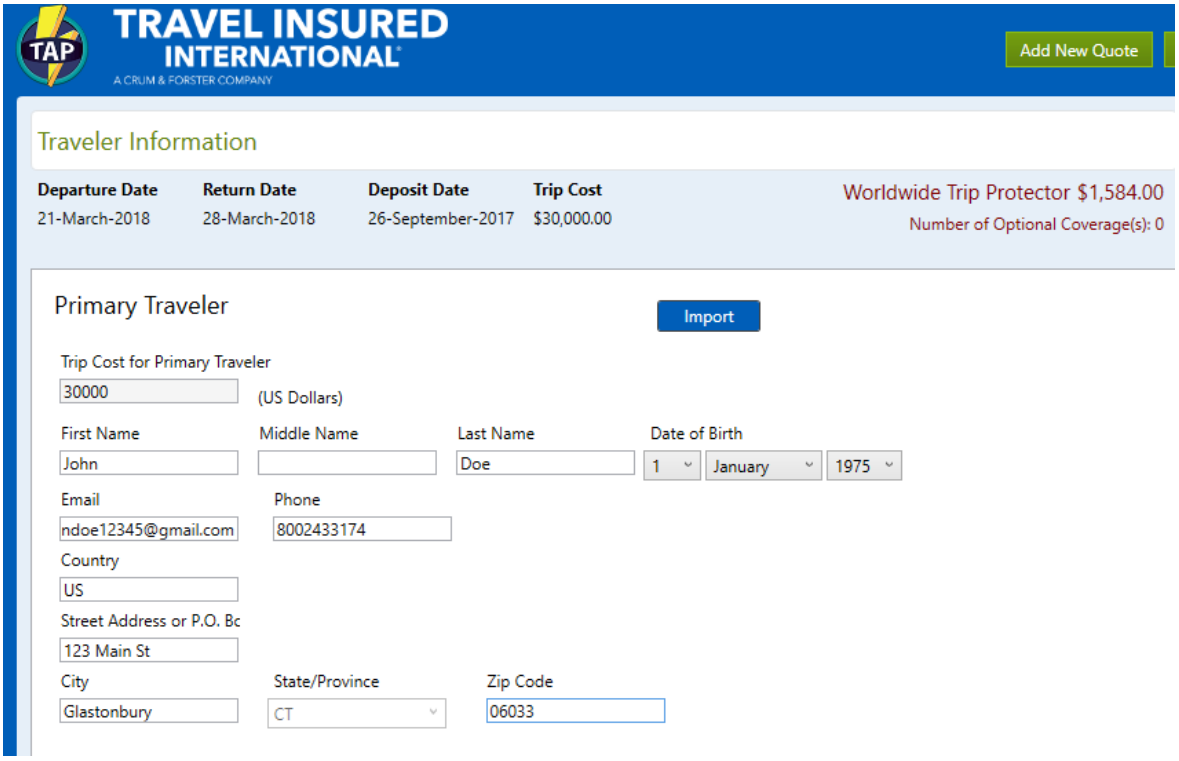
Click the **"Next"** button at the bottom right of your screen to proceed.



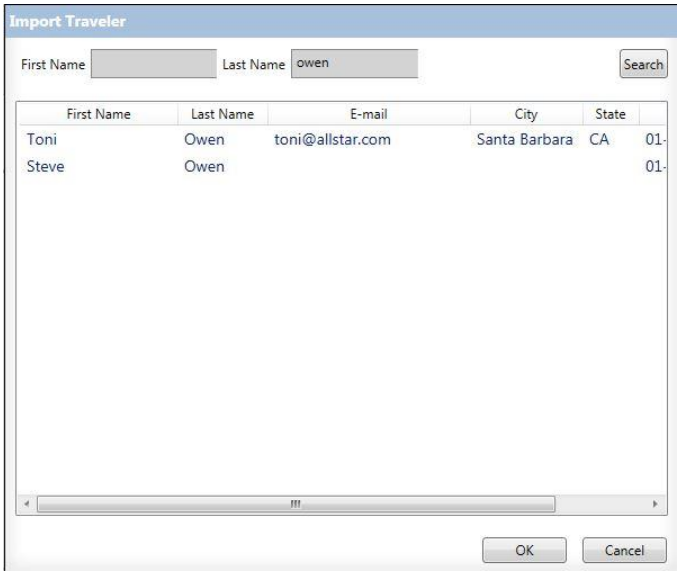
Traveler Information:

You can enter your traveler information or choose the **"Import"** button to retrieve data from past plans for repeat travelers. This saves a lot of time when purchasing plans.

NOTE: The email address entered on this page is used to send a confirmation email.

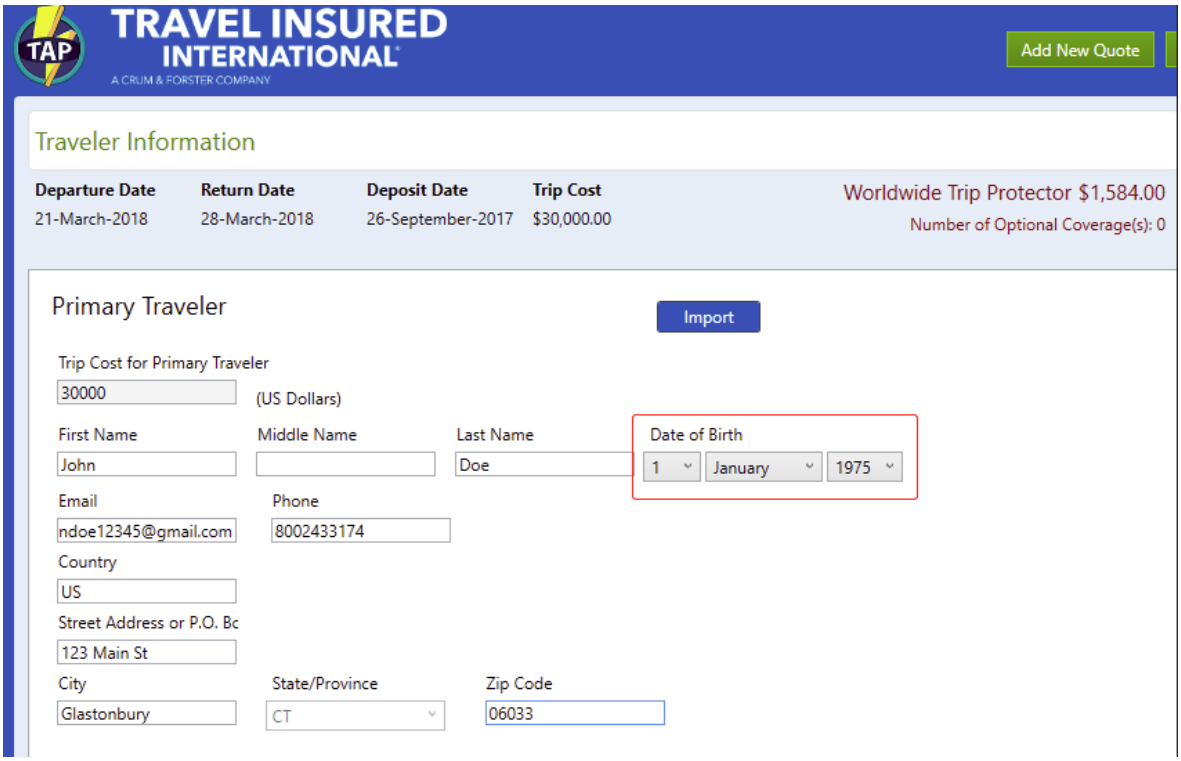


When clicking the **"Import"** button, enter the last name of the traveler you wish to import and click the **"Search"** button to view past plan data. Select the one you wish to import, and click "OK."



Contact information fields are auto-populated.

Verify that all data is accurate, especially the *Date of Birth*.



Once you review all data fields, click the **"Import"** button next to Traveler #2 to import name and *Date of Birth* for the companion traveler (if any).

TAP completes the search criteria for you based on the primary traveler entered in the previous step.

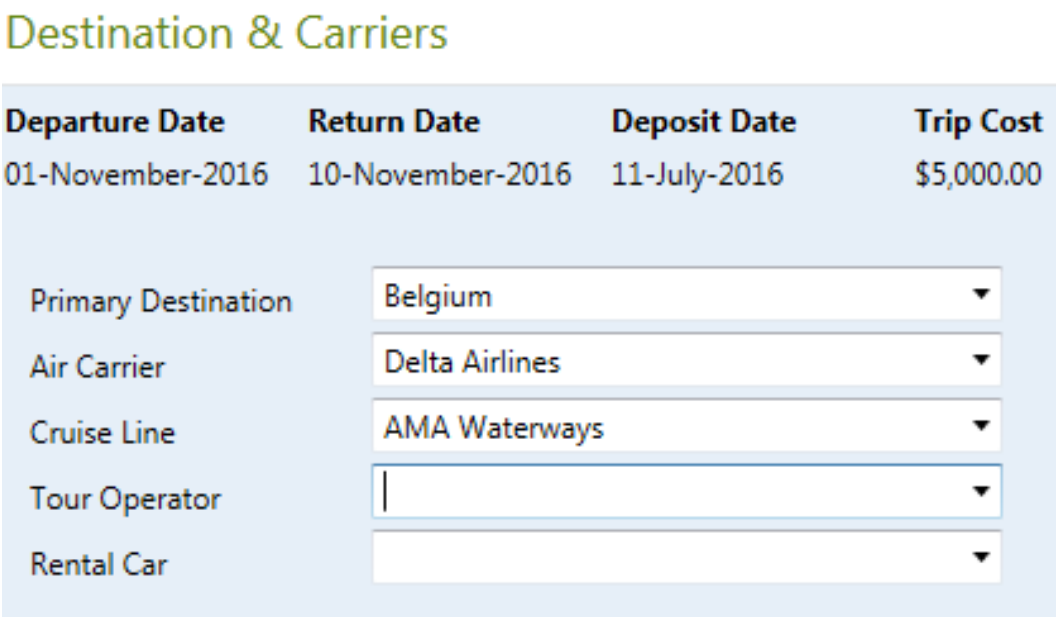
Simply click the **"Search"** button, and then select the traveler you wish to import, and click OK.

The name and date of birth are auto-populated. Click the **"Next"** button to proceed.

Destination & Carriers:

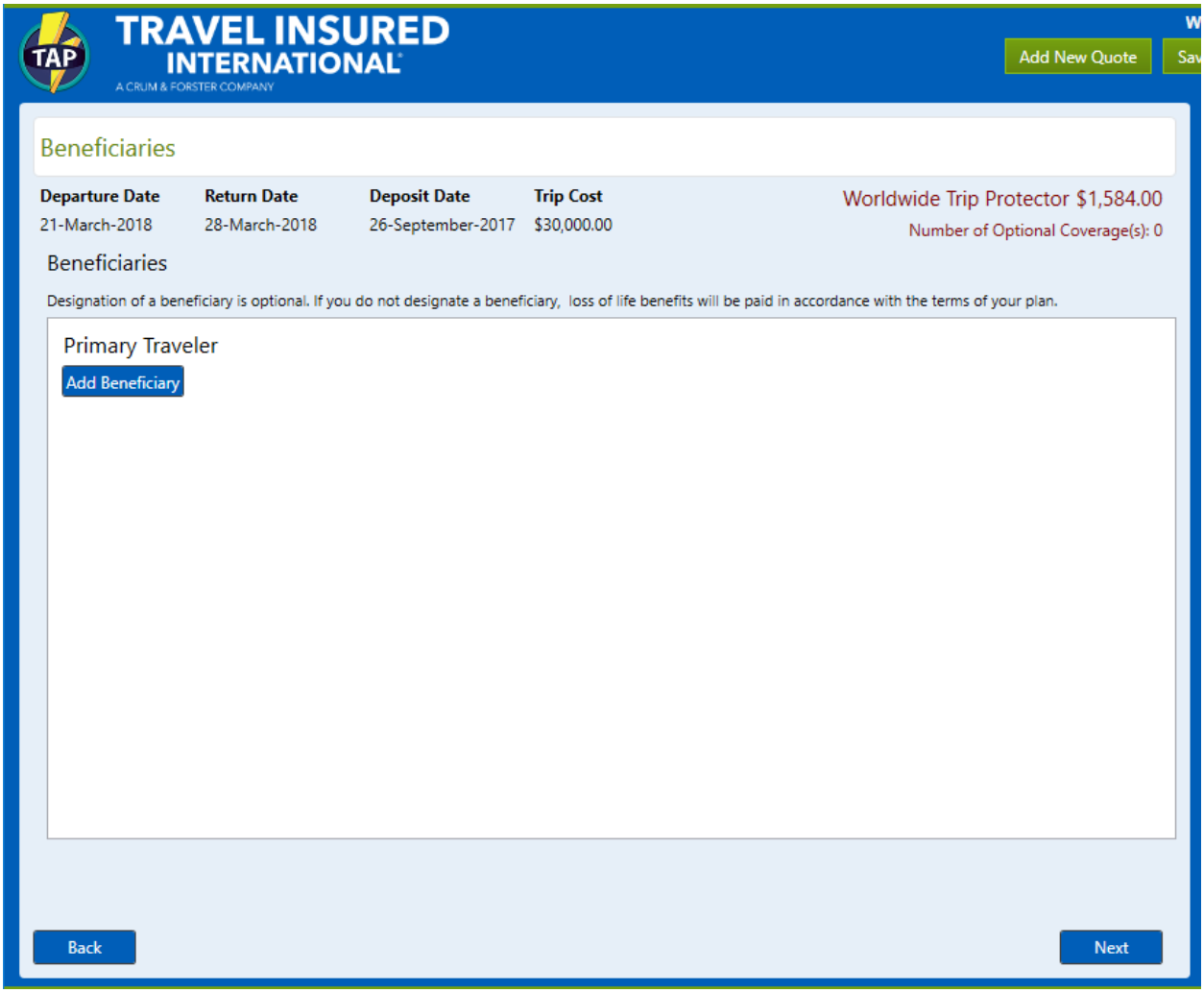
The Primary Destination field is mandatory, all other fields are optional. If there are multiple carriers you can put just one, or leave it blank. If the carrier name is not listed as an option, you can also leave it blank. The fields auto populate as you type.

When complete, click the **"Next"** button to add beneficiaries and proceed to the Payment Information screen.



Add Beneficiaries:

Listing beneficiaries is optional. You can also use our Modify Request feature to add a beneficiary later.



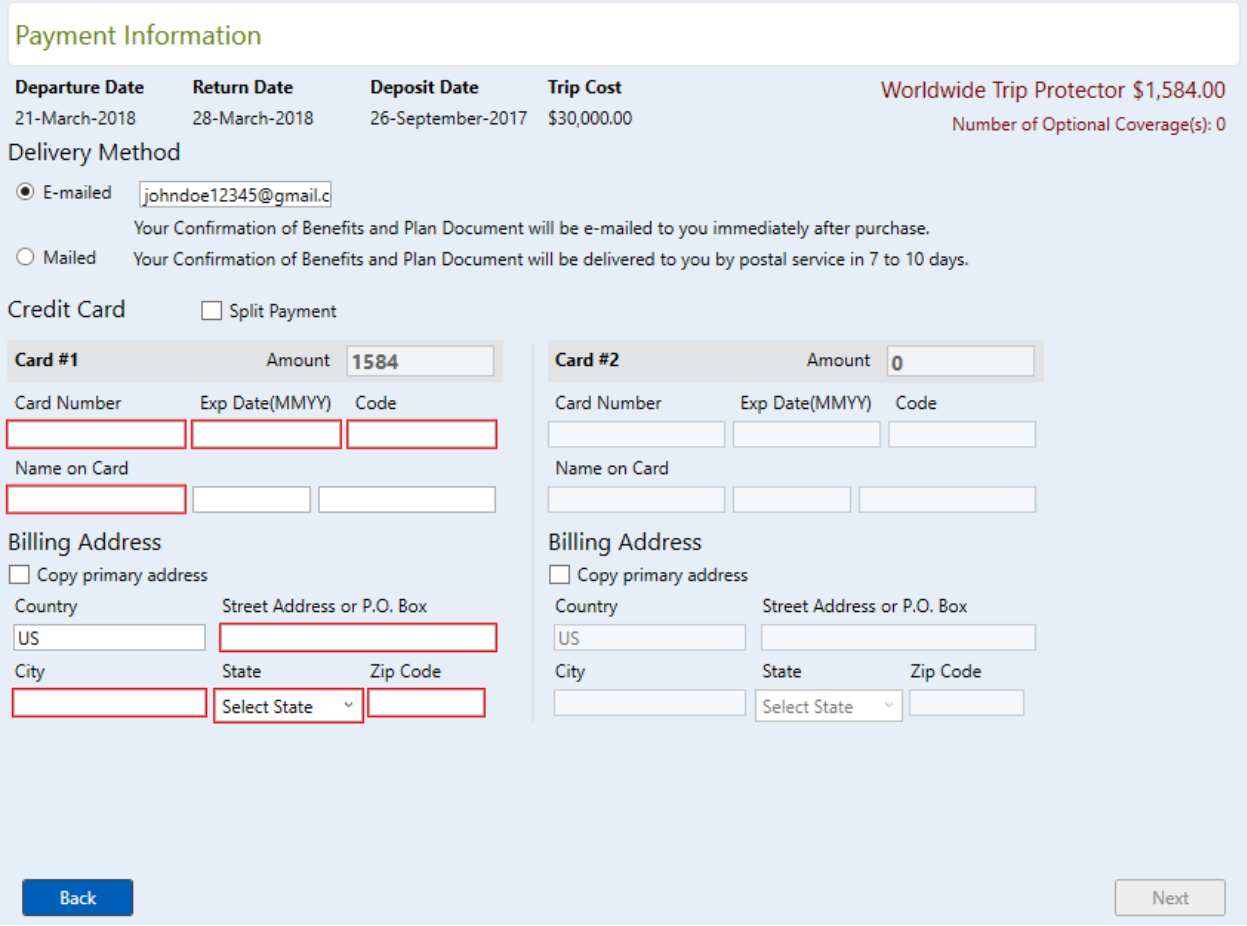
Payment Information:

You can overwrite the email in the **Delivery Method** section on this page if you wish to send confirmation to a second party. Confirmation emails are automatically sent to the email provided for the primary traveler, as well as the email indicated on this Payment page.

If both emails are the same, only one confirmation is sent.

You can split your payment on up to two credit cards, if necessary. The payment can be split in any way you'd like. For example, you can split a $200 plan with $100 on each card, or you can put $50 on one card and $150 on the other.

NOTE: Credit card numbers are never imported for security purposes. Therefore, you will have to input the card number every time.

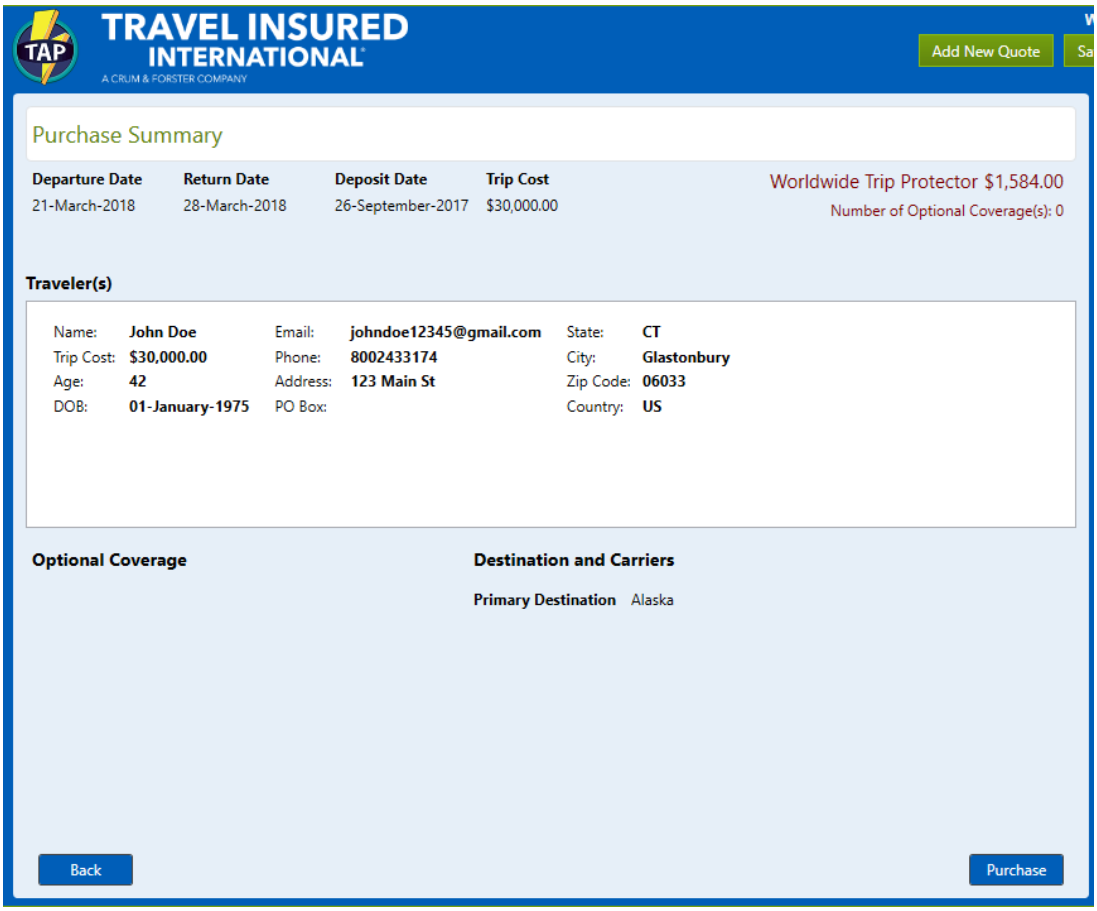
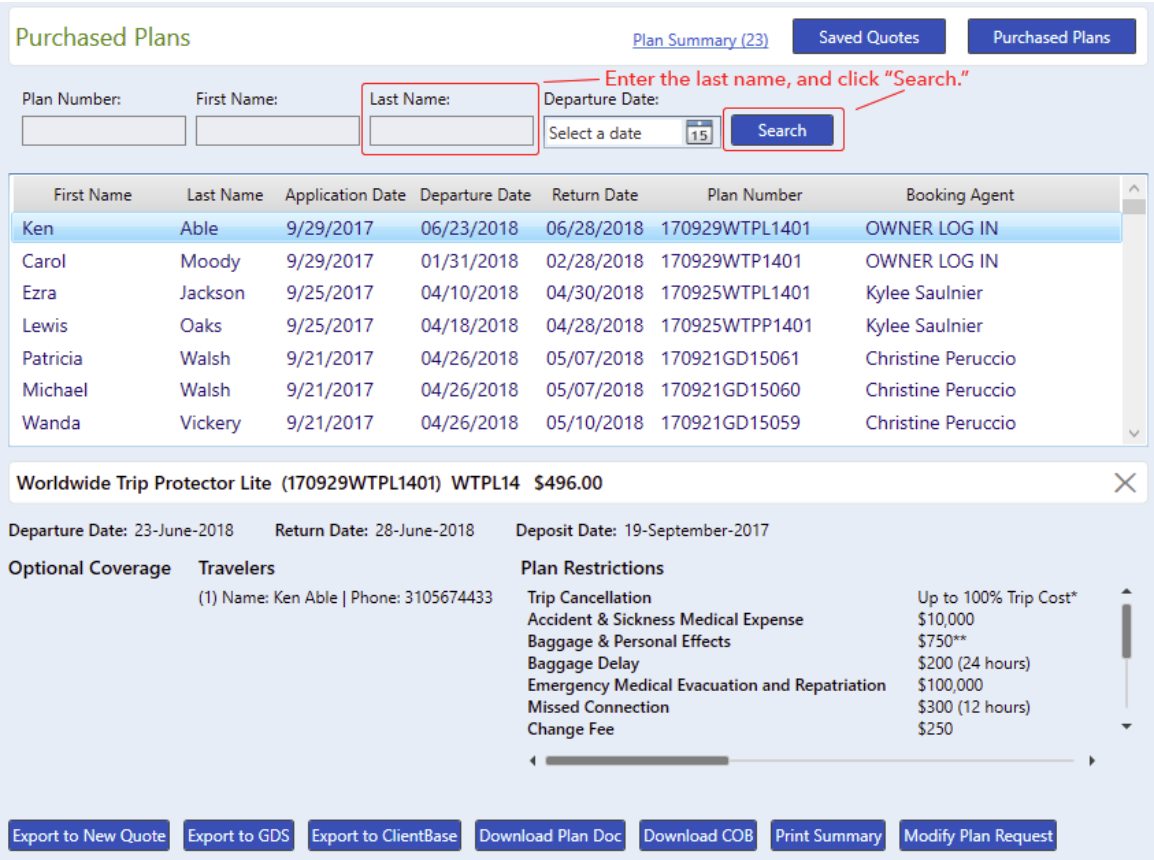


Once all data is complete, click the **"Next"** Button for a final review.

Plan Review:

After data is reviewed, click the **"Purchase"** button in the lower right and wait for confirmation from the server.

NOTE: If there are multiple travelers, you may need to scroll to view them all.



To find this plan in TAP, simply go back to the **Saved Quotes & Plans** screen, and select the **"Purchased Plans"** button. Enter the name of your traveler and click the **"Search"** button.