



TRAVEL INSURED AGENT PORTAL

9 TAP Tips

The following is a list of hints and tips based on the most frequently asked questions.

1. Add/Modify a Quote

To *add* a new quote, click on the **“Add New Quote”** button at the top right of your screen. Enter your criteria and click the **“Next”** button to view plans.

Add New Quote

To *modify* an existing quote, click the **“Saved Quotes & Plans”** button at the top right of the screen. Search for your quote, highlight it, and then select the **“Load Selected Quote”** button at the bottom left corner of your screen. This opens your quote. Enter the State of Residence, and click **“Get Quote.”** Make your changes and click on the **“Save/Email Quote”** button, or click the **“Next”** button to proceed to purchase.

Saved Quotes & Plans

2. Select the Correct State of Residence

Coverage and pricing may vary by state, so it is very important to get quotes using the correct state. Otherwise, you may provide clients with incorrect information.

3. Add Optional Coverage

After selecting your plan from the list on the TAP Plan Information page, select the optional coverage from the box below, and click on the red **“Reload Quote”** button. Your optional coverage will be added, and your price will be recalculated. Notice the red text to the right of the Optional Coverage box. You must click the **“Reload Quote”** button each time you add or remove optional coverage from your plan before you save, or click the **“Next”** button to proceed to purchase.

Reload Quote

4. Use 3 Opportunities (Email Reminders)

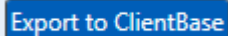
Travel Insured’s 3 Opportunities email program will allow you to stay on top of your clients without having to remember to. We will send reminder emails to them regarding important deadlines for purchasing travel protection.

5. Send Plan Data to ClientBase

In ClientBase, click on the **Utilities** dropdown menu, then select **Live Connect Providers** and add **TAP** as a new Live Connect provider. Change the *Import XML From* field to: **Local File** and click “OK.”

Link this TAP profile to your Vendor profile for Travel Insured: Open your Travel Insured Vendor Profile, click on the “**Live Connect Providers**” button at the bottom of the profile, and click on **Add**. Locate the profile for TAP from the drop down list, enter TAP into the Vendor Code Box, and click OK.

Once you complete these steps in ClientBase, you are ready to export from TAP. Click on the “**Saved Quotes & Plans**” button in TAP, and go to your Purchased Plans screen. Search for the plan you wish to export, highlight that plan from the list, and click on the “**Export to ClientBase**” button at the bottom of the screen. This writes a file to your hard drive.



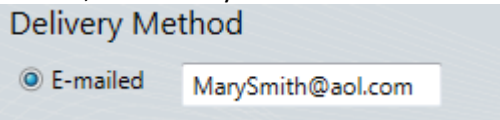
Open your Res Card in ClientBase, click on “Live Connect,” and connect to your **TAP** profile. Click on “Import Existing Reservation,” select your file from the list, and click “Import.”



Note: If ClientBase is on Terminal Server, it is recommended you install TAP on the server. Refer to the *ClientBase Setup* document if you need more help.

6. Send Plan Data to Multiple Emails

TAP automatically sends a confirmation to the email noted on the Traveler Information page. If you wish to add a second email, enter it on the Payment Information page, under *Delivery Method*. Overwrite the default, and enter your second email. Both will receive a confirmation.



E-mailed

7. Split Payments

TAP allows you to split the plan payment on two credit cards in whichever way you would like. You can split the payment 50/50, 60/40, or even 10/90.

8. When the Plan Name Field Shows “Empty”

TAP displays an “Empty” name field on your Purchased Plans screen when a plan has been cancelled.

9. Error Received When Trying To Book

TAP displays an error message if the age you entered did not match the *Date of Birth* field, because the plan quoted was not the same as the purchased amount. To fix this, use the “**Back**” button to get to the home screen and change the *age* field. Then move forward to verify or change the *Date of Birth* field and proceed to purchase.