

Purpose: This tutorial is meant to serve as a supplement to the Generate Travel Agency E&O Indication Online tutorial.

PART I—GENERATE INDICATION:

From the Main Screen:

1. Type the applicant's five-digit zip code into the field and click on **Get Instant Quote** link. The General Questions page displays.

From the General Questions page:

1. Click to select whether the applicant's company derives 50% or more of its gross receipts as a tour operator or meeting planner.
2. Click to select whether the applicant's company is located in a residence.
3. Click to select the year the applicant's company was established and its business structure type from the dropdown menus.
4. Type the percentage of the applicant's annual gross receipts that are derived from corporate travel into the designated field.
5. Click to select the number of years the applicant has been working continuously as a travel agent/ tour operator from the designated dropdown menu.
6. Click to select whether any claims, suits or proceedings have been brought against them or their predecessors in business, affiliates, or any of their past or present partners, owners, officers, sales persons or employees within the past five years.
7. Click to select whether the applicant's full-time employees hold any of the listed certifications.
8. Click on the **Next** button. The Limits/Deductibles page displays.

From the Limits/Deductibles page:

1. Click to select the applicant's desired limits and deductible from the dropdown menu.
2. Type or click to select the applicant's effective date into the field.
3. Click to select the deductible type from the designated dropdown menu.
4. Type the applicant's annual gross sales for the next 12 months into the designated field.
5. Type to indicate the percentage of annual gross receipts in the fields for the corresponding regions. **NOTE:** The figures must total 100, and all fields must contain an entry, which may be a "0," if applicable.
6. Click to select whether there is an in-house training program for all travel agents who work for the applicant's firm.
7. Click to select whether the applicant's employees regularly take fam tips to destinations frequently recommended to travelers.
8. Click to select whether the applicant routinely offers travel insurance.
9. Click to select the top three carriers from the designated dropdown menus if responded "Yes" to the previous question.
10. Click to select whether the applicant documents traveler insurance declinations.
11. Click on the **Next** button. The Travel Agency Instant Quote page displays.

From the Travel Agency Instant Quote page:

1. Review the customer's charges and fees for accuracy and click on the **Next** button. The Corporate Insured Name page displays.
2. Type the applicant's legal entity and DBA name; phone and fax number; office contact name, email address, password and website address into the designated field.
3. Click on the **Next** button. The Professional Liability Quote Indication page displays.
4. Click on the **Next** button.