

Unlimited Journeys Travel – New IC Agent Onboarding Checklist

While doing business as an Independent Travel Advisor with UJT, anytime that you complete any type of continuing education courses, please send certificates of completion or emails received from the suppliers stating that courses have been completed to: ICSUPPORT@UNLIMITEDJOURNEYSTRAVEL.COM

Reach out to icsupport@unlimitedjourneysttravel.com if you have any questions or need help with anything.

Helpful Hints:

~Follow steps in order for best results

1. Proof of Travel Agent Credentials/Certs (only applies if you are an existing agent coming from another agency)

- ☐ Scan & Submit copy of IATA/CLIA/TRUE ID
- ☐ Scan & submit copies of completed training certification documents
- ☐ Forward to: icsupport@unlimitedjourneysttravel.com

2. Watch MANDATORY Fraud Prevention videos available on the Agent Portal.

Once you have watched all videos, send an email to icsupport@unlimitedjourneysttravel.com attesting to having watched them.

3. Click the link below to self-register to access TLN Agent Universe. When you use this link, it sends us a request to approve. Once you are approved, you will receive an email. *Do not attempt to complete your profile set up at this time. You will have the opportunity to do this more completely further down this checklist.*

<https://agentprofiler.travelleaders.com/registration.aspx?asi=1188543>

4. Log in to AgentUniverse.com to access the TLN Training Library. You will complete three modules. Once completed, send completion certificates or emails to icsupport@unlimitedjourneysttravel.com. Follow the navigational paths below to complete the following modules:

Navigate to: TLN Training Library > Social Media & Marketing > Agent Profiler > Agent Profiler Basic to Advance

Navigate to: TLN Training Library > Advisor Awareness > Recorded Session > Advisor Awareness – Being Empowered Against Fraud When Selling Air & Others

Navigate to: TLN Training Library > Advisor Awareness > Recorded Session > Advisor Awareness > Understanding Phishing Schemes > How to Protect Yourself Against Phishing Attacks

5. Log in to AgentUniverse.com to access the TLN Training Library.

Navigate to: TLN Training Library > SNAP! (Air, Hotel, Car) Booking Tool

Complete the following:

1. Step 1 - Recording
6. Recorded Sessions - Watch all three
7. Basic Training (Intro to Selling Air, Intro to Selling Hotel, Intro to Selling Rental Cars) - Watch all seven

6. Self-Register, enroll and complete Centrav Academy Certified Air Specialist Training. Please note, approvals from Centrav can take anywhere from 1-3 business days.

<https://academy.centrav.com/>

7. Prior to your Vendor Focus Call, please identify the type of travel you intend to focus on initially. Having a defined area of interest will allow us to customize the call and introduce suppliers that best align with your business goals. If you don't have a particular area of interest, that's ok! We'll gear the call to a more generalized format. Just let us know upon booking.

8. Schedule Vendor Focus Call. Email icsupport@unlimitedjourneystravel.com to request this meeting be scheduled. Send an email to icsupport after this call to let us know what vendor education you want to be signed up for. Sign up & complete recommended vendor educational sessions discussed during this meeting.

9. Setup email signature with compliant disclosures & optional calendar link. See instructions on the Agent Portal. The signature compliance will open as a download. It must be downloaded and copy/pasted in order to format properly on Outlook.

10. Schedule & Complete Travel Insurance Training with Chubb & Allianz

For CHUBB:

Email: mia.prieto@chubb.com to request an account be created. Complete self study training. Once that is done, contact Mia Prieto again to schedule a 15 minute new agent call.

For ALLIANZ:

Email: icsupport@unlimitedjourneystravel.com to request access to AgentMaxOnline for Allianz Travel Insurance training. Once access is granted, complete the self study training on Allianz policies.

11. Schedule VCRM Training by clicking the link on our Agent Portal. This training consists of four 1-hour appointments.

12. Business Phone Line service or VOIP connection to UJT Home Office Phone System. If you wish to sign up for the optional VOIP phone connection through UJT, email your request to icsupport@unlimitedjourneystravel.com. We will set up a phone line for you.

13. Setup Social Media Accounts See social media setup guidelines document on the Agent Portal for suggestions and compliance. You may not use your personal social media accounts to market your travel business!

14. Log in to TLN Agent Profile. Update your profile to reflect your business phone number and new business social media accounts.

15. Obtain E&O Insurance coverage

An E & O policy must be in place prior to actually beginning sales. Necessary information to be included in the policy is listed on the Agent Portal as well as contact information for two companies that our agents have used. You are welcome to use whichever insurance company you wish as long as our requirements are met. Have your insurance agent email the certificate of additional insured to:

icsupport@unlimitedjourneystravel.com

16. Complete Travel Leaders Network Agent Profile and submit for national publishing.

17. Write to ICSupport to request a Cleared to Launch call.

18. Cleared for Take Off!