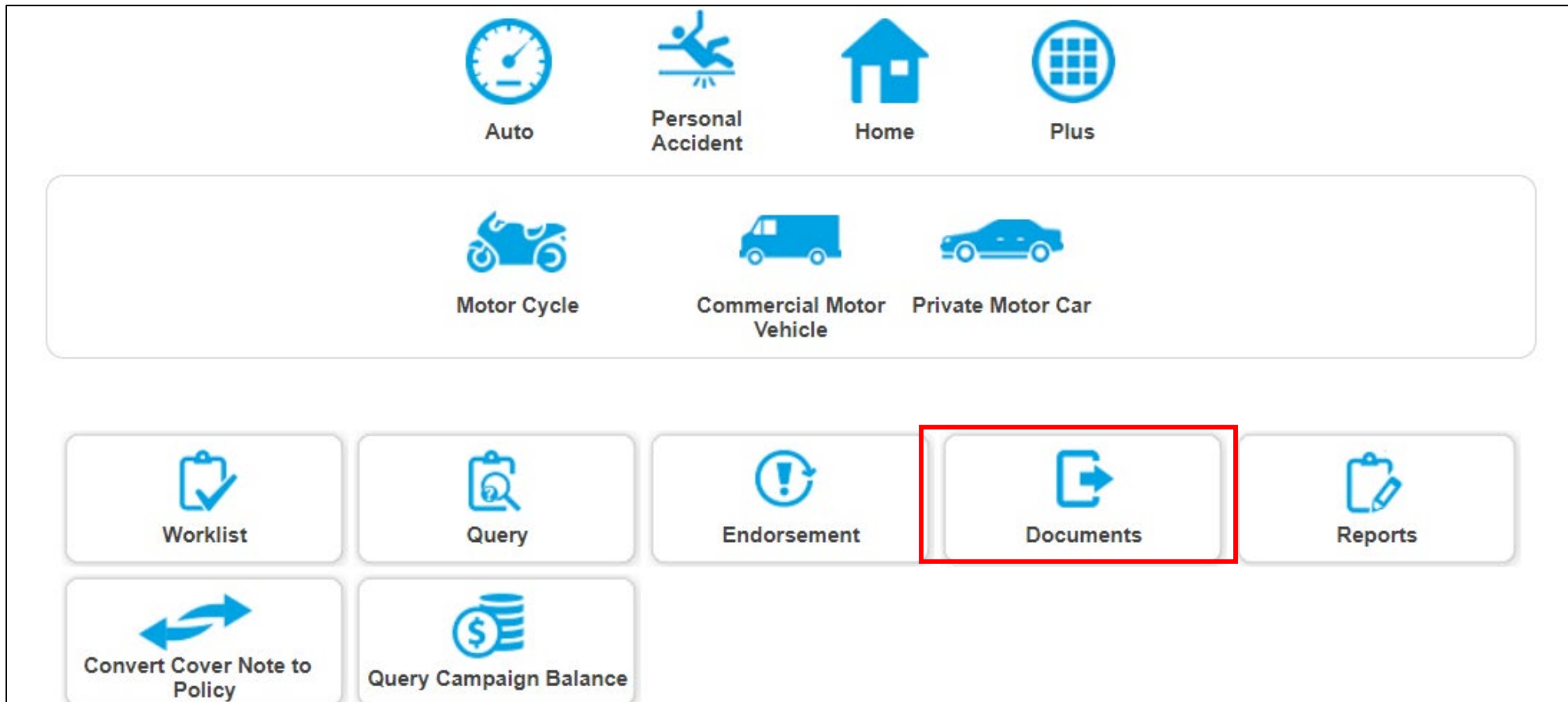


How to Send / Resend Documents on eWay

How to Send / Resend Documents on eWay

This function allows the user to **send** unsent documents and **resend** fulfilled documents such as quotations, policy documents, and endorsements.



How to Send / Resend Documents on eWay

Documents

Transaction Type/Document Type/Fulfillment Type

Please Select

Please Select

Please Select
Please Select
Initial print
Reprint

Quote/Policy number

Customer name

Vehicle Registration No

Document Club Type

Please Select

Recipient

Please Select

From

DD/MM/YYYY

To

DD/MM/YYYY

Search

Initial Print

Use when document has NOT been previewed or sent yet. Initial Print allows previewing or sending via email and offline.

Reprint

Use when document has been previewed or sent already. **Reprint** only allows saving of document via Preview. Producer may then manually email or print and send to customer.

Initial Print – Sending Documents

1. Under **Fulfillment Type** (mandatory), select **Initial Print**.
2. Input **Customer Name** (Last name followed by first Name or Vehicle No.)

Documents

Transaction Type/Document Type/Fulfillment Type

New Business/Renewal

Please Select

Initial print

Quote/Policy number

Customer name

MARY TAN

Vehicle Registration No

Document Club Type

Please Select

Recipient

Please Select

From

DD/MM/YYYY

To

DD/MM/YYYY

Search

3. Select which set to send and if via email / offline. User may also preview document set.

<input type="checkbox"/>	Quote/Policy Number	Endorsement Number	Product Code	Customer Name	Sales Channel Code	Document Type	Document Set	Print Type	DefaultEmailID	Additional Email IDs
<input type="checkbox"/>	7220001573		PMC	MARY TAN	0500257000	Policy Schedule for New Business	Additional	<div><input type="checkbox"/> email</div> <div><input type="checkbox"/> offline</div>	trainingagency@aig.com	

*For the exception producer, please select the enabled print type (email or offline) and "Submit" to send to the producer. Otherwise, to send the customer copy directly to the customer, please select "Override" followed by either email or offline and click "Submit".

Preview

Submit



Reprint - Resending Fulfilled Documents

1. Select Reprint.
2. Input quotation/policy number – Preferred Search – Customer Name /Vehicle No.

Documents

Transaction Type/Document Type/Fulfillment Type

New Business/Renewal

Please Select

Reprint

Quote/Policy number

Customer name

MARY TAN

Vehicle Registration No

Document Club Type

Please Select

Recipient

Please Select

From

DD/MM/YYYY

To

DD/MM/YYYY

Search

3. Select document to be saved.

Producer will have to save document and manually resend to customer.

Password for the saved file is their 6-digit producer code.

<input type="checkbox"/>	Quote/Policy Number	Endorsement Number	Product Code	Customer Name	Sales Channel Code	Document Type	Document Set	Status
<input type="checkbox"/>	7220001573		PMC	MARY TAN	0500257000	Policy Schedule for New Business	Producer	Success

(1 / 1074) << first < prev 1 2 3 4 5 6 7 8 9 10 next > last >> 10

Preview

4. Click Preview to save document.

NOTE:
Status indicating "Success" means it was successfully delivered in the Initial Print.

