

# Introduction of eWay

## What is eWay?

- In a single platform, you will have access to all lines of business (**Auto, Personal Property, Individual Personal Accident and Plus**).
- You can **enquire, quote, bind, renew** and perform selected **endorsements**.
- The built-in automated business and underwriting rules means you will be able to transact the cases with **faster turnaround time** and the cases will be directly referred to the underwriters for review.

# eWay Landing Page



Producer Name & Producer Code

Welcome **DIRECT AGENCY** | Logged in as 0500257000 | System time: 31/03/2022 11:25 | Logout



Auto



Personal Accident



Home



Plus

Products and Plans Available



Motor Cycle




Commercial Motor Vehicle




Private Motor Car


Quick Access Buttons




Worklist




Query




Endorsement




Documents



Reports



Convert Cover Note to Policy



Query Campaign Balance



## Which Products and Plans are available in eWay?








- Auto
  - Private Motor Car
  - Commercial Motor Vehicle

- Home
  - Packaged
  - A-la-carte
  - Public Housing
  - Premium Client Solutions

- Personal Accident
  - Hospital Income
  - Personal Accident
  - Critical Illness
  - Domestic Helper

- Plus
  - Personal Solutions Plan

# Quick Access Buttons and Functions

 Worklist	Worklist allows user to see his/her pending quotations done in the system
 Query	Query button allows users to view the information (policy information, payment history, quote version history and GIRO/RCC status for the pending quote or issued policy
 Endorsement	Depending on the authority level and products that sales platform users are authorized, users can also create endorsement by click this box
 Documents	This is the option to select if user wants to view the documents sent to customer or would want to re-send the forms or documents sent to customers
 Reports	A dropdown list will be available for the user to see the various report options available for the system to generate
 Convert Cover Note to Policy	This is a quick selection to convert cover note to policy. Only applicable for Auto
 Query Campaign Balance	This allows user to view information related to a specific active campaign that has been rolled out

## Work List

Individual tabs to search for In-Progress New Business, Endorsements and Renewals quotes.

New Business

Endorsement

Renewal

## Work List

## Search Criteria

Product

Please Select

Quotation Number

Task Name

Please Select

Customer Name

Customer ID Number/Business  
Registration Number

Sales Channel

[Find](#)

Quotation Creation Date

DD/MM/YY

DD/MM/YY

Effective Date

DD/MM/YY

DD/MM/YY

Underwriting involved

All

Underwriter decision

Please Select

License Plate No.

Pending PDPA Acceptance

Please Select

Search
















Reset

Please use query to search if policy is not found.

Policy which are expiring 60 days prior to the expiry date will have their Renewal Quotation in Worklist.

Producer may search using **Keyword** such as Policy Number, Customer ID, Customer Name, etc. to narrow down the search based on the additional fields.

**Query Policy**

Product name 	Home (Public Housing) ▼	Quote/Policy reference number 	<input type="text"/>
Customer name 	<input type="text"/>	Customer ID/registration number 	<input type="text"/>
Insured type 	Please Select ▼	Premium range	<input type="text" value="S\$00.00"/> - <input type="text" value="S\$00.00"/>
Policy effective date from	<input type="text" value="DD/MM/YY"/>  <input type="text" value="DD/MM/YY"/> 	Policy issue date from	<input type="text" value="DD/MM/YY"/>  <input type="text" value="DD/MM/YY"/> 
Quotation Creation Date	<input type="text" value="DD/MM/YY"/>  <input type="text" value="DD/MM/YY"/> 	Application date from	<input type="text" value="DD/MM/YY"/>  <input type="text" value="DD/MM/YY"/> 
Proposal date from	<input type="text" value="DD/MM/YY"/>  <input type="text" value="DD/MM/YY"/> 	Quote Status	Please Select ▼

**Search**

[Pending Quotes \(37\)](#) [Issued Policies \(67\)](#)

Pending Quotes referring to In-Progress Quote.



Producer may search for the policy that they want to create an endorsement for by using the fields enclosed in red. Select the policy then click on **Create Endorsement**.


Endorsement Policy Query



logged in as Beng-Choo Ang | System time: 27/03/2017 13:31 | Logout

Landing Page > Endorsement Policy Query


**Policy Query**



**Search Criteria**

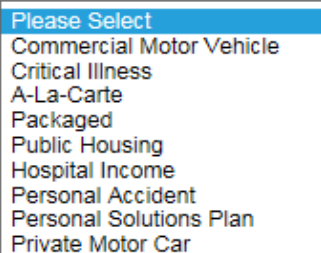
Product:  

Policy Effective Date:    


Customer ID:

Insured Type:  

Proposal Date:    



	Policy Number	Product	Customer Name	Customer ID	Policy Effective Date	Proposal Date
<input type="radio"/>	<a href="#">1700141398</a>	Commercial Motor Vehicle	SR Ve	20031980BC	24/03/2017	01/03/2017
<input type="radio"/>	<a href="#">1700115386</a>	Private Motor Car	liew sam	S7822020A	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700115359</a>	Private Motor Car	De Cheese Wolverine	S8365704I	25/03/2017	25/03/2017
<input checked="" type="radio"/>	<a href="#">1700115382</a>	Private Motor Car	LUM BRYAN	S5024041Z	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700115390</a>	Private Motor Car	Brigitte	S0013908D	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700115381</a>	Private Motor Car	Marley Bob	S5784890A	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700115364</a>	Private Motor Car	Barbie Zac	S8338154Z	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700115374</a>	Private Motor Car	Padilla Rustom	S8974591H	25/03/2017	25/03/2017
<input type="radio"/>	<a href="#">1700106475</a>	Private Motor Car	Rich Richie	GF123134	24/03/2017	24/03/2017
<input type="radio"/>	<a href="#">1700106459</a>	Commercial Motor Vehicle	SR Ve	20031980BC	17/03/2017	01/03/2017

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

Documents

Transaction Type/Document Type/Fulfillment Type

Please Select

Please Select

Please Select

Please Select

Please Select

Please Select

Initial print

Reprint

Quote/Policy number

Customer name

Vehicle Registration No

Document Club Type

Recipient

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

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1

2

3

4

5

6

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8

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10

next > last >>

10

Preview

4. Click Preview to save document.

**NOTE:**

Status indicating “Success” means it was successfully delivered in the Initial Print.



Allows the users to quickly get access to other function modules or pages, such as Work List, Query, Create Endorsement, Output, Reports, etc.

Reports Query

Report Name

Please Select

Please Select

Cancellation and Endorsements Notice Summary

Cover Note Pending Policy Issuance Report

Credit Limit Monitoring Report

Lapsed Cancellation and Bank Rejected Report

Renewal Notice Summary

Search

**Renewal Notice Summary** - Lists all upcoming renewable eWay policies for the following 60 days.