

SME Transact

Guide to Print Documents

How to Print Documents

1. Under My Applications, click on SME. You will be redirected to SME Transact.

The screenshot displays the AIG agent dashboard. At the top, there is a navigation bar with links: **My Dashboard**, **Tools** (with a dropdown arrow), **Products** (with a dropdown arrow), and **My Profile**. The main content area is divided into three columns. The left column contains two sections: **My Applications** and **My Favorites**. In the **My Applications** section, there are three items: **ATLAS**, **eWay**, and **SME**. The **SME** item is highlighted with a red rectangular box. The **My Favorites** section lists **Auto - Business**, **SME Packages**, and **Health - Corporate**, each with a blue **FORM >** button. The middle column has a **Check Policy Status** section with a dropdown menu for **Policy Number**, a text input field labeled **Enter a Policy Number**, and a **GO** button. Below this are two buttons: **Check Claim Status** and **Check Marketing Status**, both with right-pointing arrows. The right column features an **AIG Highlight** section for the **AIG – Prosperous Lucky 8 Campaign**, which includes a car icon and text about a gift for top agents. The campaign period is listed as **29 January to 22 February 2019**.

2. Click “Abort”. And follow by “Return to Search”.

This screenshot shows the 'Policy Details' section of the AIG Transact interface. At the top right, there is a blue navigation bar containing the 'Abort' and 'Help' buttons. The 'Abort' button is circled in red. Below this bar, the 'Policy Details' section contains several input fields: 'Intermediary' (set to 'TRAINING PRODUCER'), 'Product' (set to 'APAC SME'), 'Policy No', 'Quote No', 'Package Type' (set to 'Standard SME Package'), and 'Currency' (set to 'Singapore dollar'). A 'Search' button is located next to the 'Intermediary' field.

This screenshot shows the 'Policy Details' section of the AIG Transact interface after a search. The AIG logo and 'Transact' text are at the top left. A blue navigation bar at the top right contains the 'Return to Search' and 'Help' buttons, with 'Return to Search' circled in red. The 'Policy Details' section below shows the 'Product' field set to 'APAC SME' and the 'Currency' field set to 'Singapore dollar'. Other fields like 'Intermediary', 'Package Type' (set to 'Please Select...'), 'Policy No', 'Quote No', 'Policy Start Date', 'Policy End Date', and 'Insured Name' are also visible.

3. Input the policy number and ensure that Transaction Type & Transaction Status is “Please Select”.

Click on the Search Button on the right.

Check through the policy period of the documents you wish to print, and click on the Policy Number

AIG Transact

Please limit your search further by filling in more fields.

Transaction Search

Insured Name

Policy / Quote No

Policy Start Date to

Policy End Date to

Effective Date to

Processed Date to

Transaction Type

Transaction Status

Product

Results Per Page

« First < Prev 1 2 3 4 5 Next > Last »

Product	Transaction Type	Transaction Status	Insured Name	Policy / Quote No	Policy Start Date	Policy End Date	Effective Date
SME	Renewal Invitation	Finished	Company Pte Ltd	0123456789	01/06/2012	31/05/2013	01/06/2012

4. Click on **“Print Documentation”**.

Return to Portal Help			
Policy Details			
Intermediary	TRAINING PRODUCER		
Product	APAC SME	Package Type	Standard SME Package
Policy No	SG22021096	Currency	Singapore dollar
Quote No	QSG22A0088048		
Policy Start Date	01/03/2022	Policy End Date	28/02/2023
Insured Name	ABC TOYS PTE LTD		

5. Select the type of Documents you wish to generate.

(If you select Producer Debit/Credit Note, the “Deliver via” option will disappear as we will not want to mail your commission slip to the insured).

Once done, click on Generate selected documents.

Currency: SGD Policy History | Help | Exit

Documents

Documents Available

Please select the documents to be printed

☒ Renewal Schedule ☒ Endorsement Clause Schedule

☒ Debit/Credit Note ☐ Policy Wording

☐ Producer Debit/Credit Note

Deliver via

☐ Email

Generate Selected Documents

6. You may also click the hyperlink to open a PDF copy of the policy document and save it in your laptop / PC.

Policy Details			
Intermediary			
Product	APAC SME	Package Type	Standard SME Package
Policy No		Currency	Singapore dollar
Quote No			
Policy Start Date	01/03/2014	Policy End Date	28/02/2015
Insured Name			

Transaction Details			
Transaction Type	Renewal	First Processed By	Katherine Kay
Transaction Status	Bound	Last Modified By	
Gross Premium		Last Modified Date	02/04/2014 16:18:29+0800
Effective Date	01/03/2014		

Transaction Documents	
Policy Documentation Package	SG1234556789 Printed On 24/03/2014 15:38:17+0800

View Task Details

Endorse Policy

Cancel Policy

Print Documentation