



AIG eXtra Trade on

Platform enhancements

Updated November 2020



Constant Improvement

We are continuing to introduce enhancements into AIG eXtra to improve your trading experience.

Here is a guide to these changes.

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Design Improvements

Styling, Design and Navigation

The styling and design of our pages have been improved to enhance the look and usability of the platform.

The navigation header has been changed to bring to the foreground the most used functions:

- New Quote
- Policy Wordings
- Advanced Search
- Recent Activity
- Quick Search



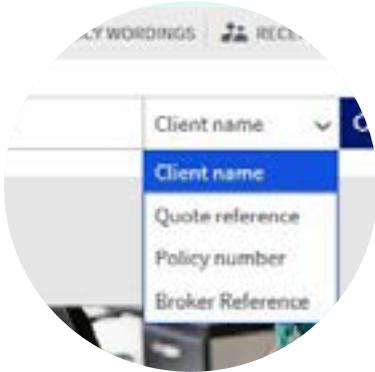
Responsive Design

AIG eExtra has now been optimised for use on tablets. Responsive design functionality also enhances access and usability of the platform on mobile devices.

Product Selection Screen

A redesigned Home Page provides you with quick access to our product range.

Search Improvements



Quick Search

Within the navigation sub-menu you can access the new Quick Search tool.

This tool allows you to search on four different criteria:

- Client name
- Quote reference
- Policy number
- Broker reference

Advanced Search

The navigation sub-menu also provides a link to the Advanced Search page. Here you will have more flexibility in how you search for a client, quote or policy.

Search Options:

Client

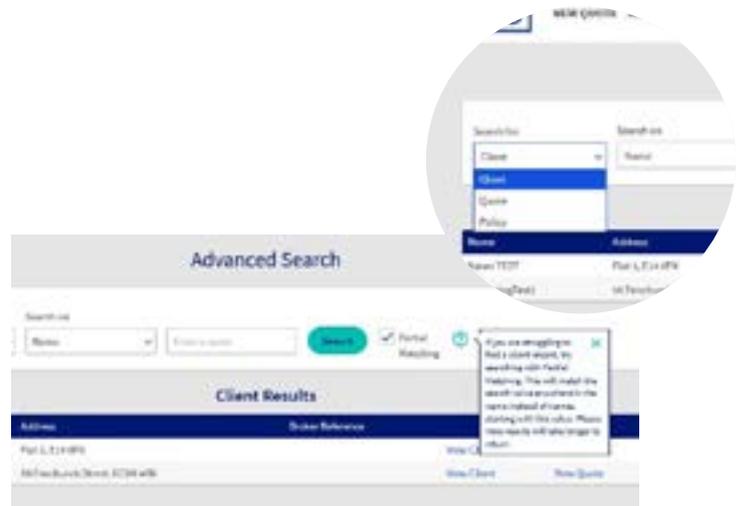
- > Name
- > Postcode
- > Broker Reference

Quote

- > Quote Reference
- > Policyholder
- > Postcode

Policy

- > Policy Number
- > Policyholder
- > Postcode



NEW JULY 2020

Companies House Look-Up

The New Quote screen now includes a Company Search field with real time integration with the Companies House database.

Pressing the Look-Up Company button initiates a drop-down list of potential matches of registered companies.

Selecting the matching company, automatically populates eXtra's fields with the available company information (such as company number, address, postcode etc)

Usability Improvements

NEW JULY 2020

Quick Requote

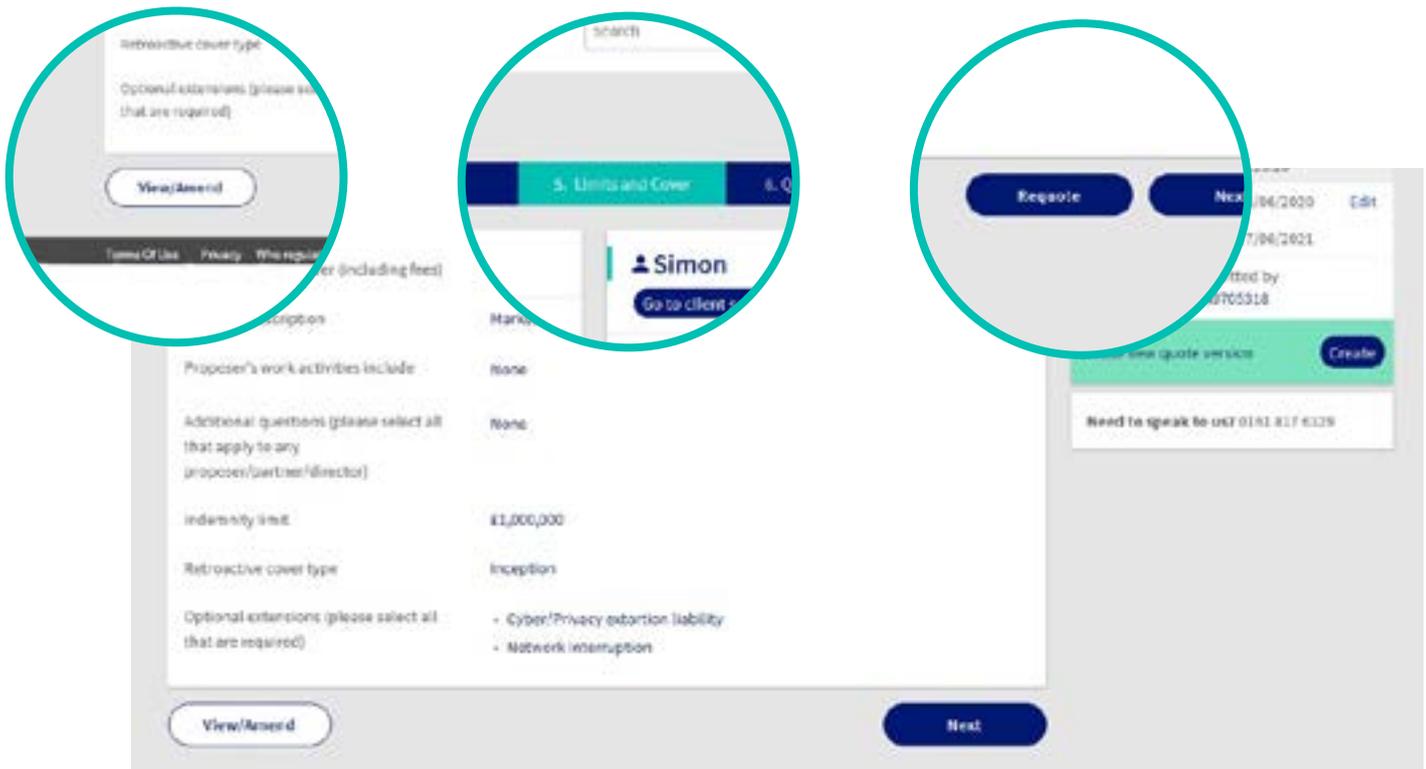
Every quotation can be amended by pressing the view/amend button



This allows you to navigate directly to the required screen (e.g. material facts, business details, limits and cover).



Once the required amendments have been made, such as selecting new cover options, pressing the "Requote" button returns you directly to the quote screen...



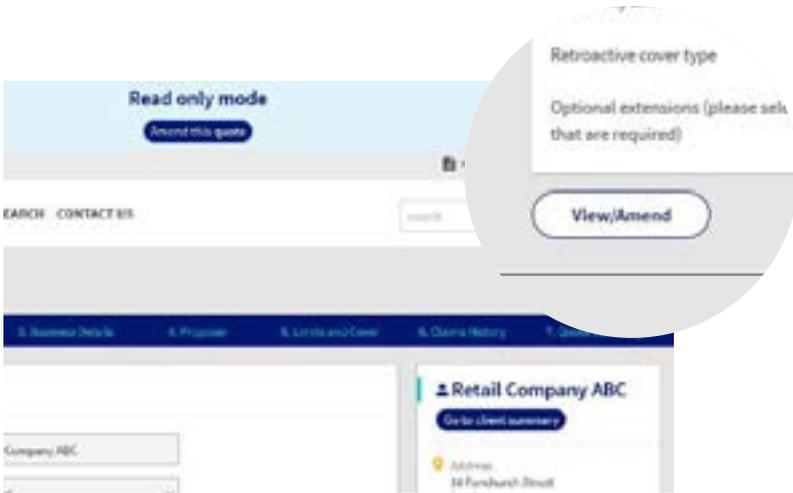
... where the requote will be immediately visible, along with the supporting documentation. (And with extra its simple to save and keep track of multiple quotes for the same client)



Validation Summary

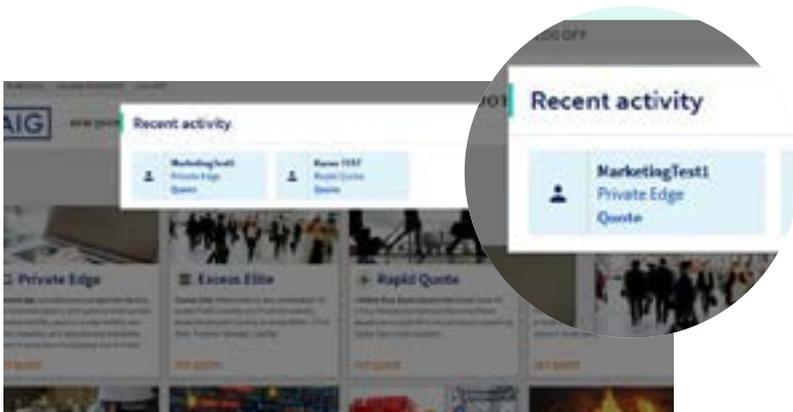
Throughout the platform we have introduced clearer instructions on where information may have been missed while being entered. A Validation Summary now appears in a red box at the top of a page, providing information on the specific fields that need to be completed before you can progress. These fields are also highlighted on the page itself.

Usability Improvements



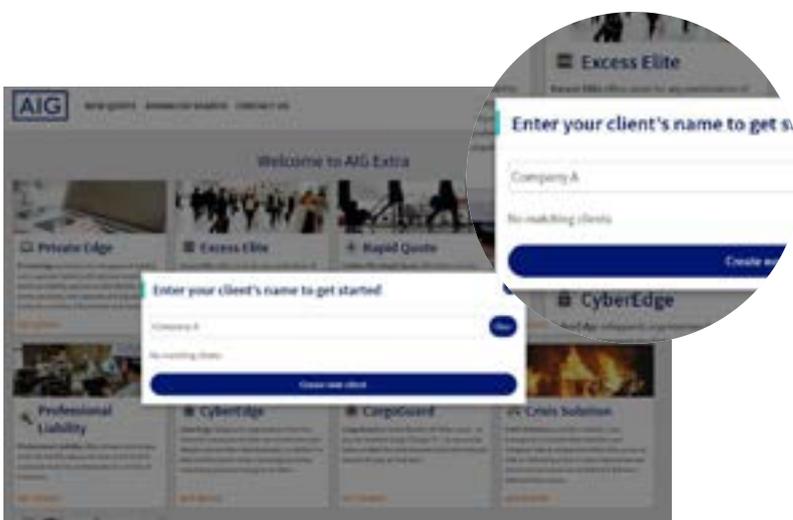
Read-Only Risk Review

A new read-only mode allows you to review a risk without inadvertently updating the details. If you do want to update information, a simple button at the top of the page will allow you to switch to amend mode.



Recent Activity

Within the new sub-menu you can access the Recent Activity link. Clicking on this button will generate a pop-up screen displaying your most recent activity. Up to 9 recent clients/quotes/policies cards can be displayed.



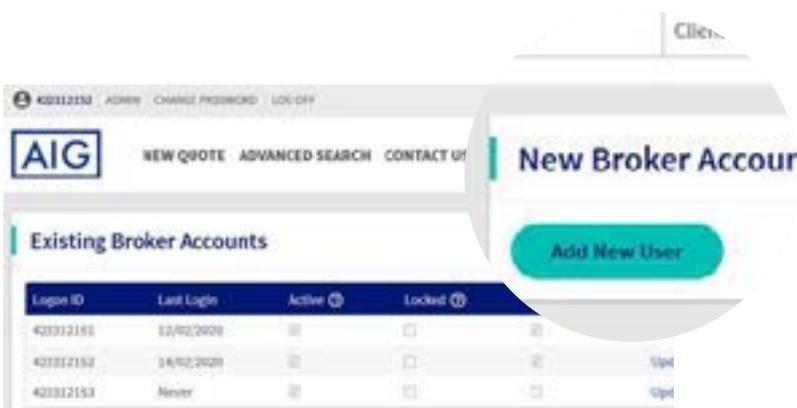
Duplicate Contact Check

To avoid creating duplicate contacts, when generating a quote or entering a new contact the platform will automatically highlight existing contacts that match those details.



Edit Client Details

This page allows you improved access to update client details. It can be reached from the Client Summary page.



User Admin

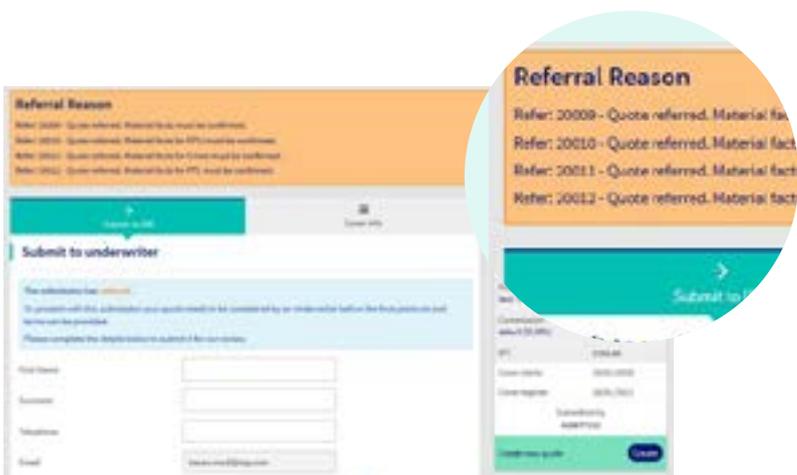
If you are the designated Admin User for your brokerage there will be an additional Admin link in your navigation menu. Clicking this button will launch a pop-up screen where you can add or update extra users within your brokerage account.

Usability Improvements continued



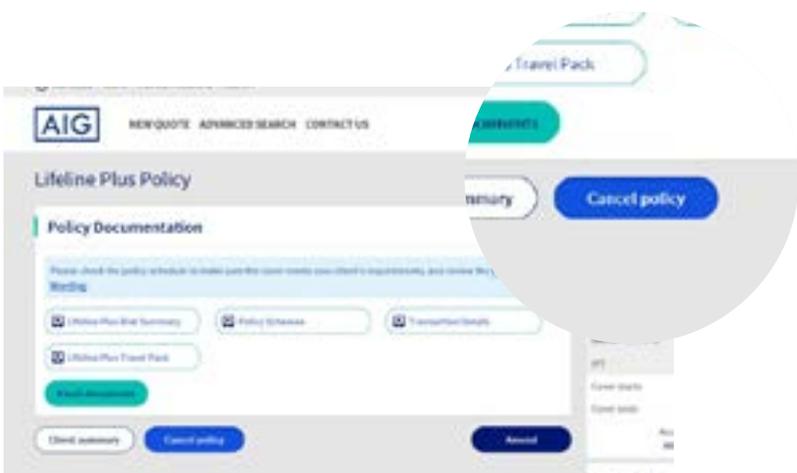
Refined Contact Us

The Contact Us form has been refined to allow for greater levels of detail.



Quote/Policy Summary/Refer/Decline

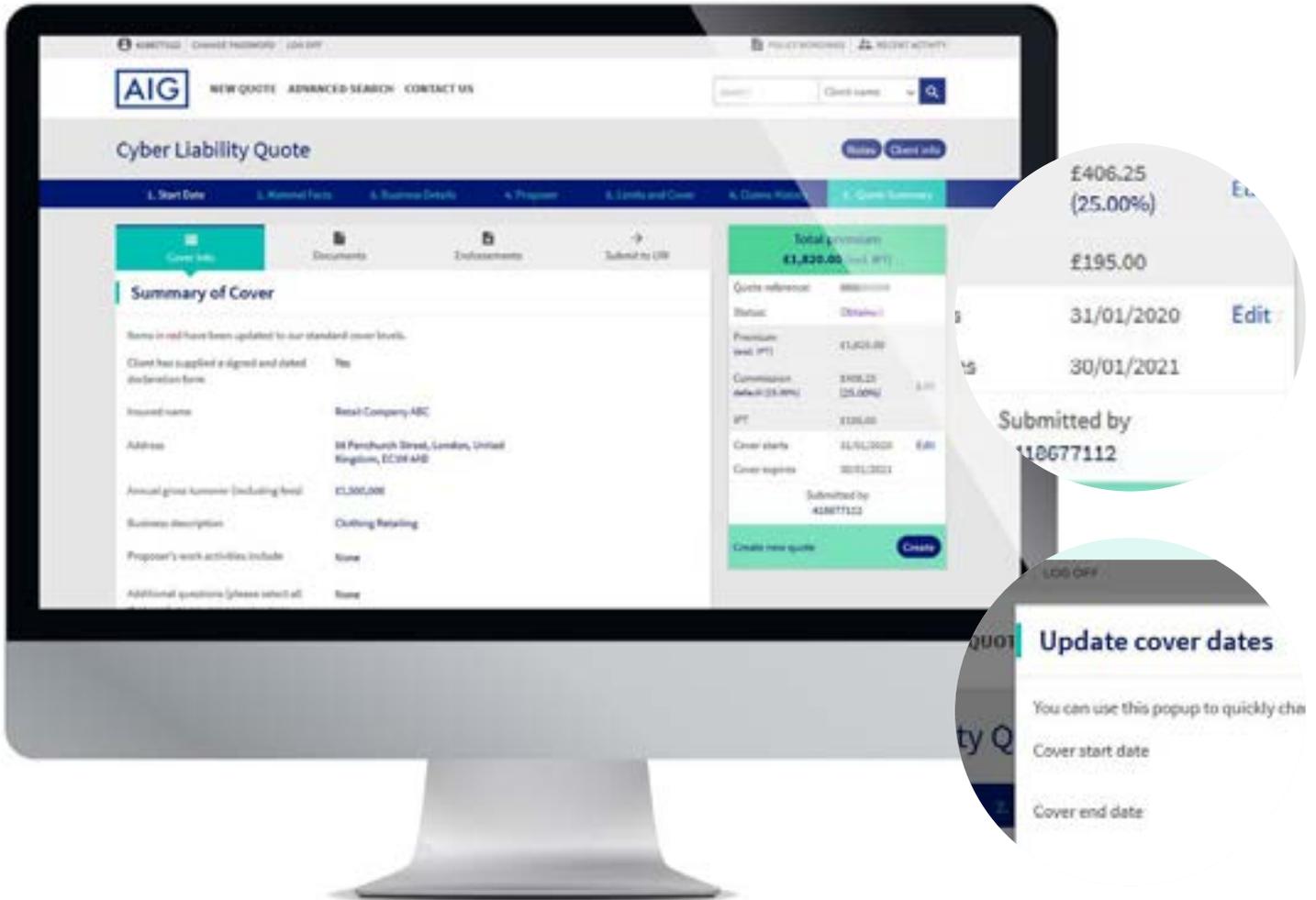
We've made it easier to understand why a quote has been referred or declined with clear notifications at the top of the page. These notifications occur across the platform to ensure you know what the issue with a submission is and how it can be resolved.



NEW JULY 2020

Online Cancellation A&H

Pressing the "Cancel Policy" button on every A&H policy summary screen opens an online request form which on completion generates a work flow for our underwriters to action and immediate confirmation on-screen and also via email confirming the cancellation request date.



Edit Term Dates

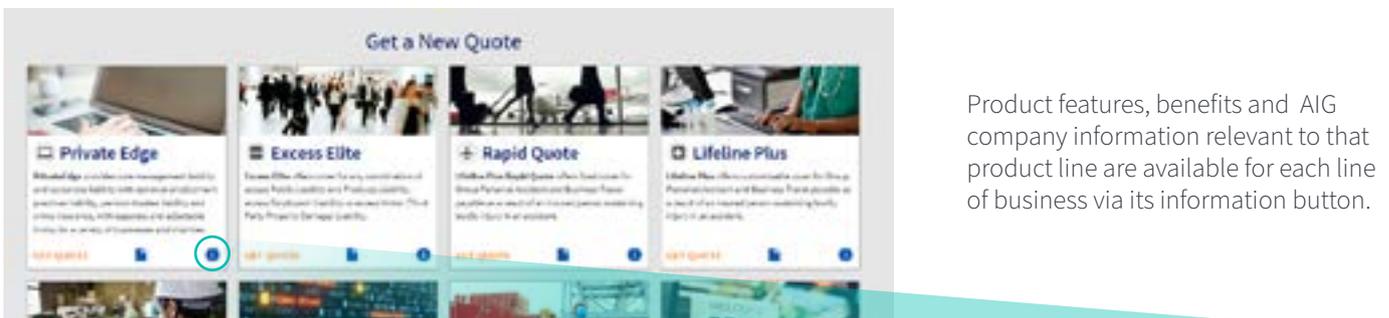
This feature allows you to edit a quote's effective dates without going back to the first page of the risk capture form.

Information Improvements

NEW NOVEMBER 2020

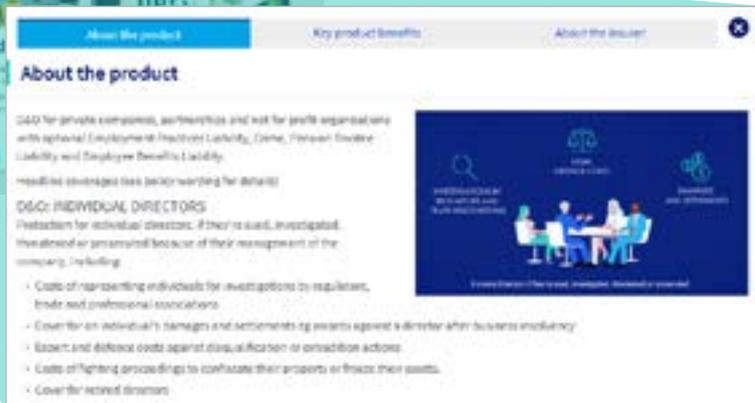
Product Features and Benefits

We have introduced new stronger product features, product benefits and insurer information. This is provided consistently for each individual product in text and video format to highlight key aspects quickly and inform your sales dialogues with clients.



Product features, benefits and AIG company information relevant to that product line are available for each line of business via its information button.

A pop-up panel will present a summary of each product's key covers and services – in bullet point form and in a short accompanying movie.



Clicking on the “Key product benefits” will change the panel to a bullet point summary of the product's customer benefits.

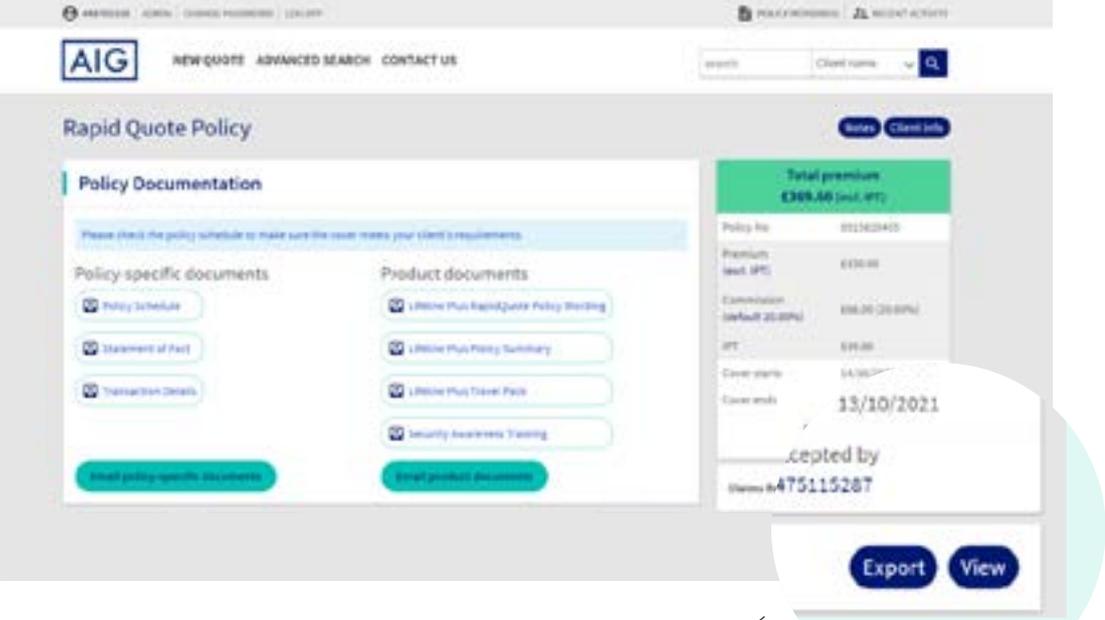


Clicking “About the insurer” will reveal summary level information about AIG, pertinent to that line of business for you to share with your clients and potential clients.



NEW JULY 2020

Claims Experience A&H, CargoGuard and Retail



Clicking the export button will generate a real time report of claims against the latest data and a spreadsheet of this data will be automatically downloaded to the broker's device.

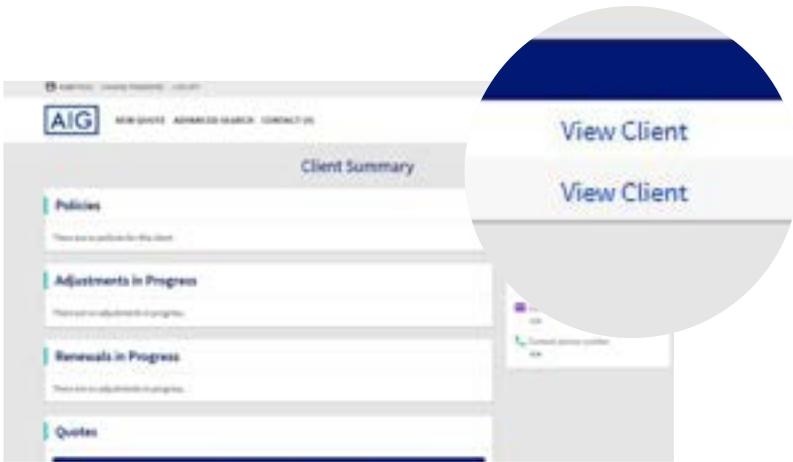
To view the claims experience on A&H, CargoGuard and Retail policies where a claim has been registered press the Claims Raised view button on the Policy Summary screen

This will open a panel summarising all claims that have been recorded under the policy including the claim number, its status and the date of loss



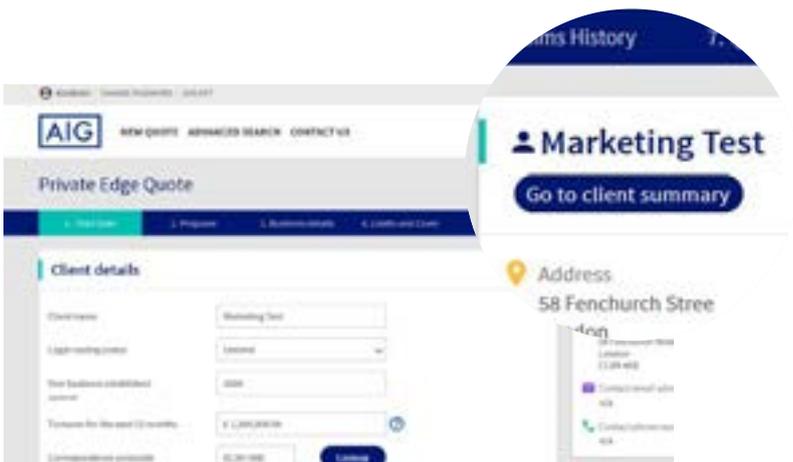
Clicking on any claim in this panel will drill-down to reveal the amount of any claims payments and also the amount of any outstanding reserve.

Information Improvements continued



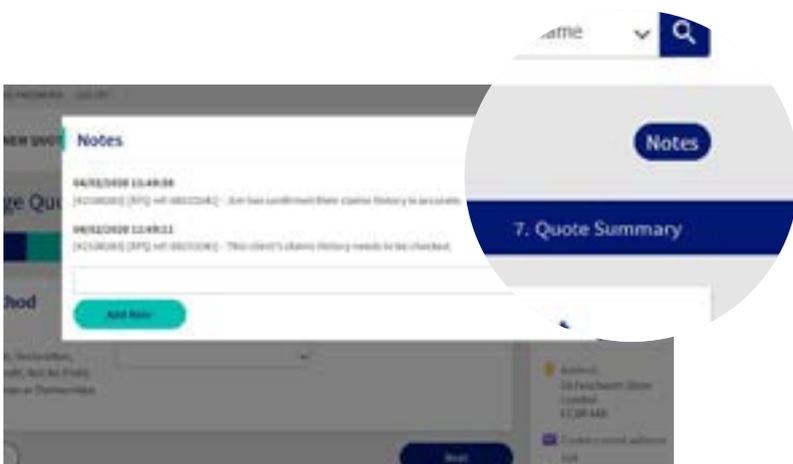
Client Summary

The Client Summary page can be reached via our search tools or the client info box. Here you can find an overview of quotes and polices for a specific client and edit/update details as required.



Client Info Side Box

A new Client Info Side Box has been added to risk capture and product pages. This allows you to quickly access the Client Summary page if required.



Broker Notes

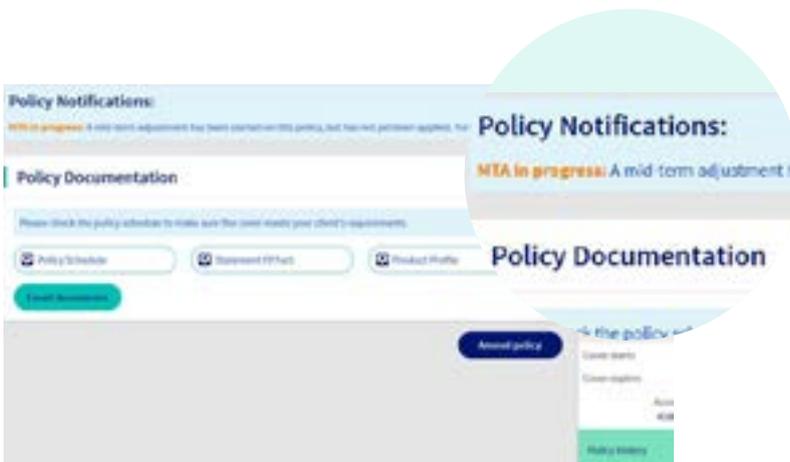
Broker Notes can be accessed by clicking on the Notes button located on the right side of the product sub-header. By clicking on the button, a pop-up window will allow you to add free field notes to any product quote. Through the same button you will also be able to see previous notes already added.

Information Improvements continued



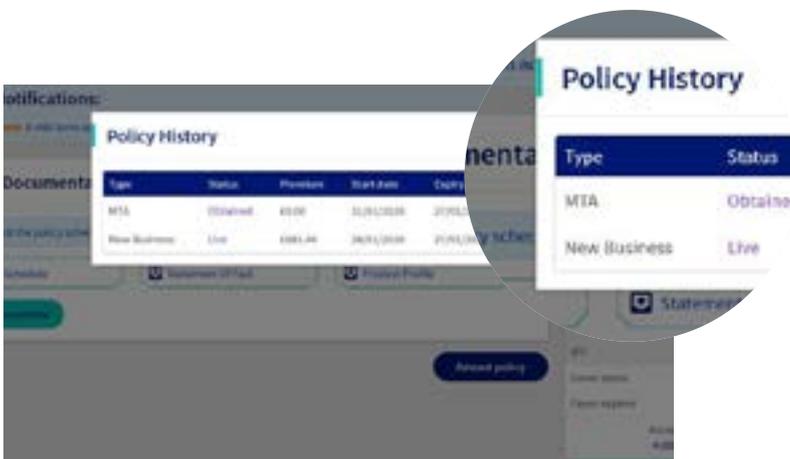
Transaction Stamping

New Transaction Stamping functionality records a unique identifier for who submitted and accepted the transaction, making auditing your quotes and renewals easier.



Policy Summary Notifications

On the Policy Summary page, new Notifications at the top of the page indicate the status of the policy or an upcoming renewal.



Policy Summary Policy History

A new Policy History page can be accessed off the Policy Summary section. This page provides new levels of detail on the history of the policy, including quotes, MTAs and renewals.

aig.co.uk/aigextra



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