



AIG eXtra
Trade on

Platform enhancements

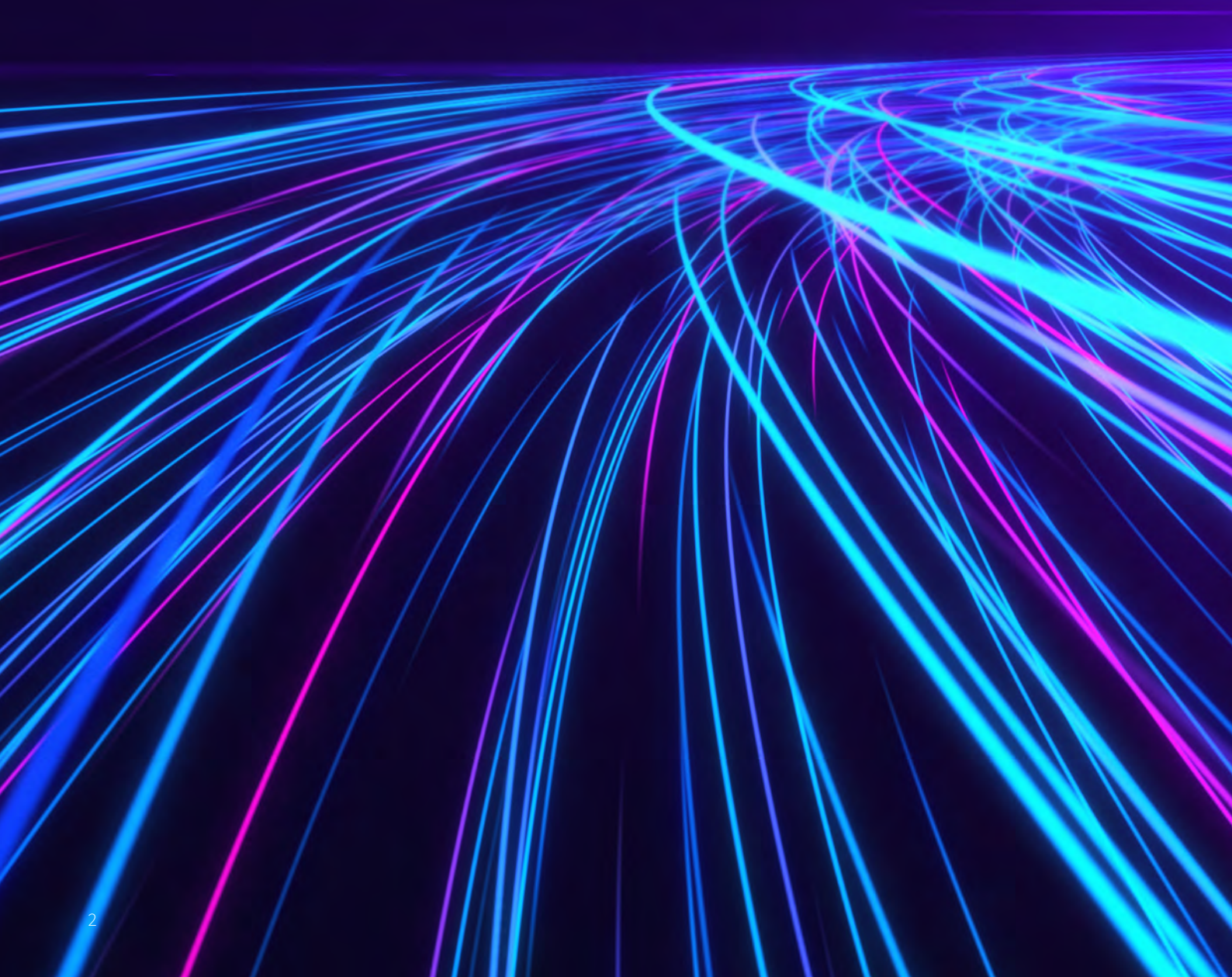
February 2020



Improving your online experience

In February 2020 we released a number of eXtra enhancements that improved the functionality and usability of our platform.

This document provides a guide to the changes and how they enhance your online experience.

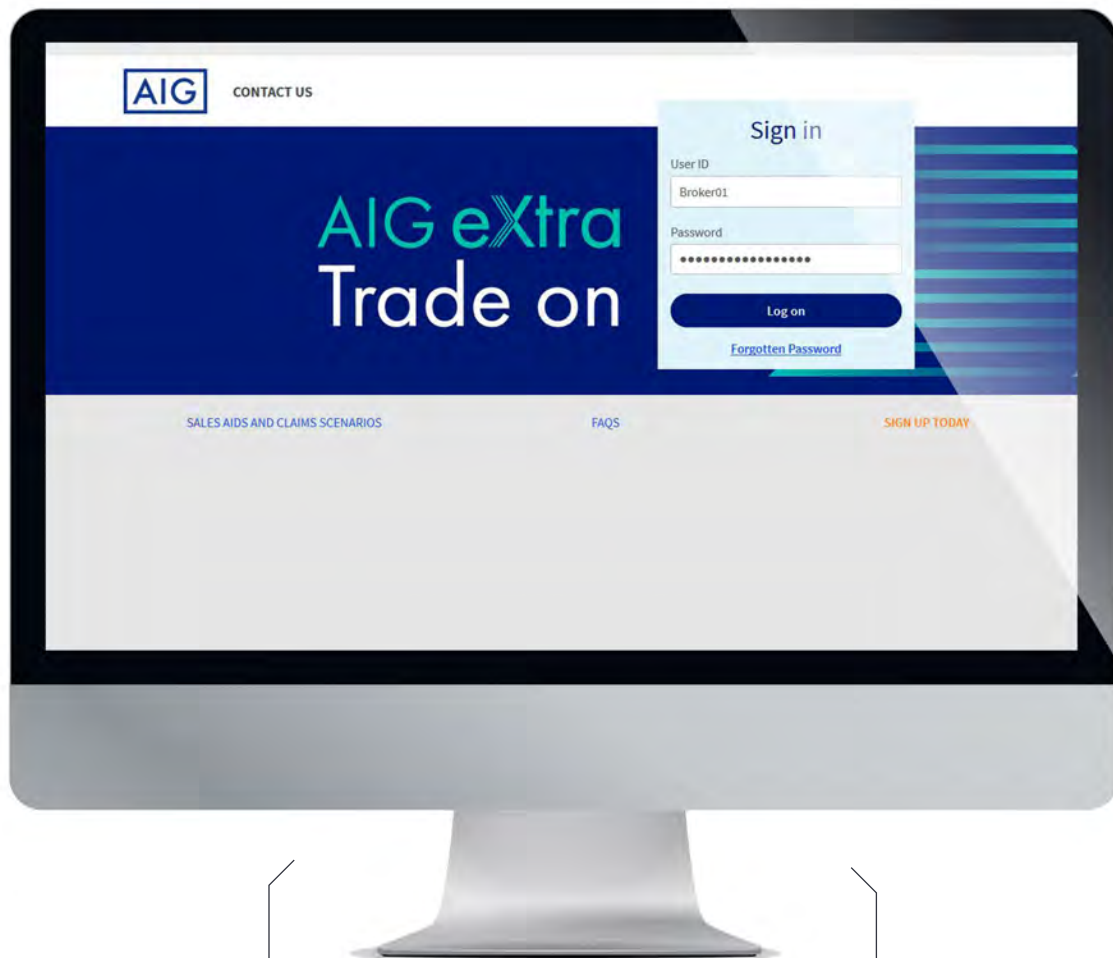


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Design Improvements

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



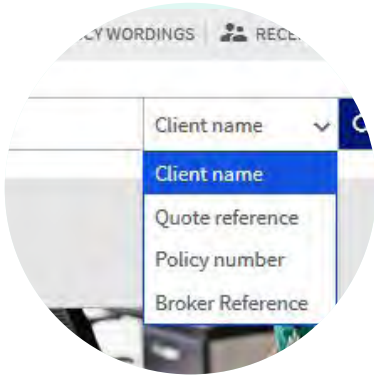
Responsive Design

AIG eXtra 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

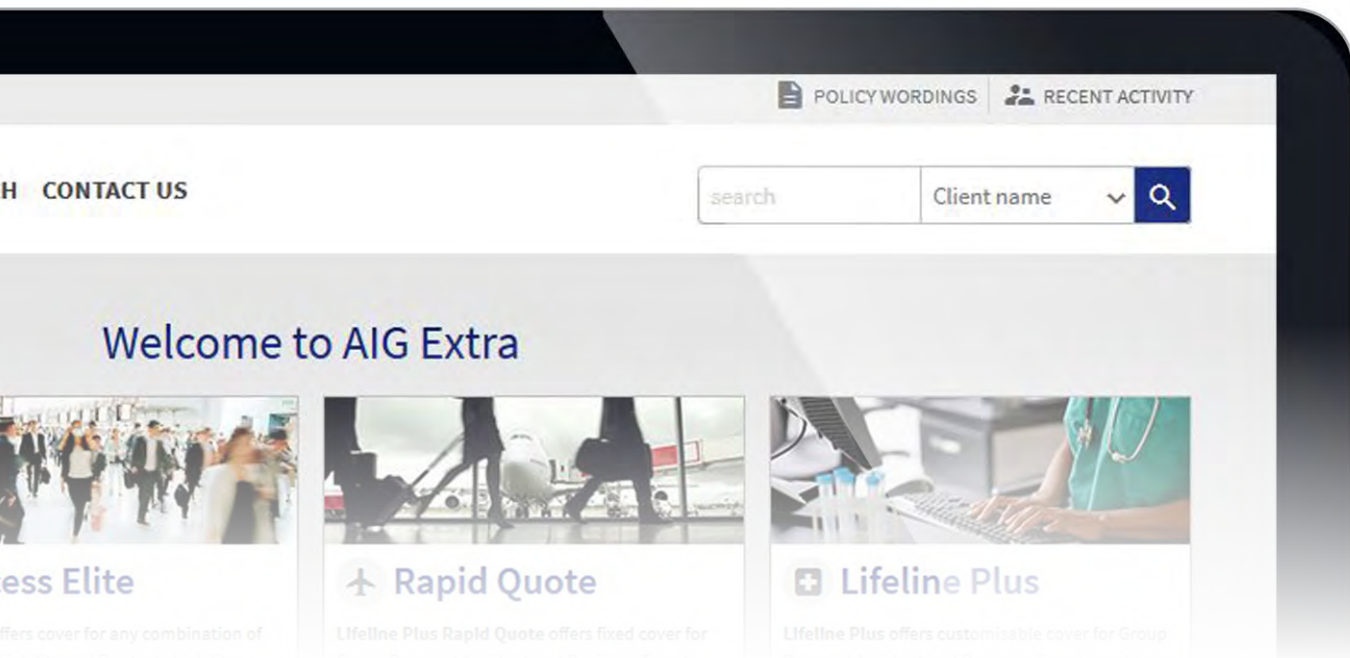
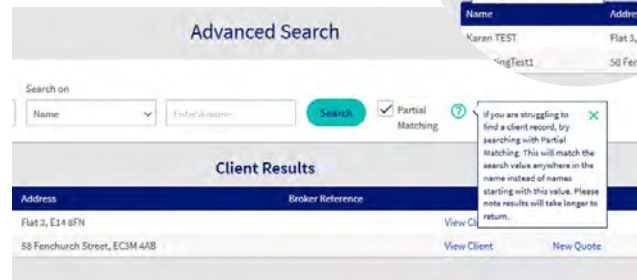
- > Name
- > Postcode
- > Broker Reference

Quote

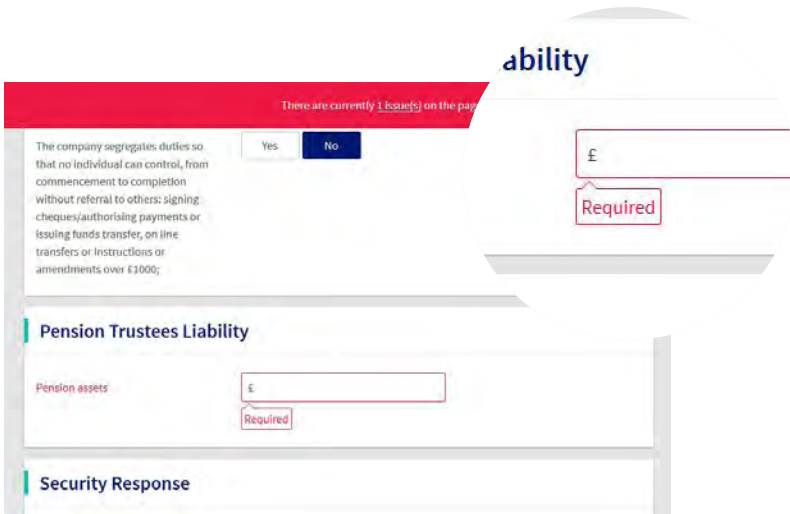
- > Quote Reference
- > Policyholder
- > Postcode

Policy

- > Policy Number
- > Policyholder
- > Postcode

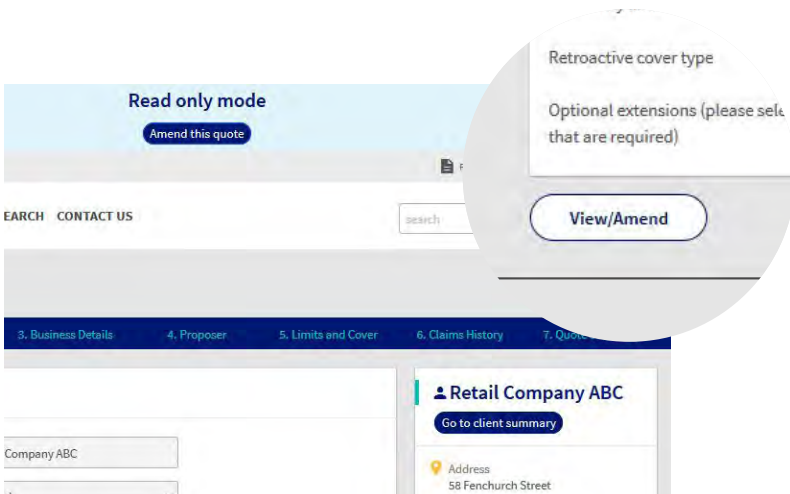


Usability Improvements



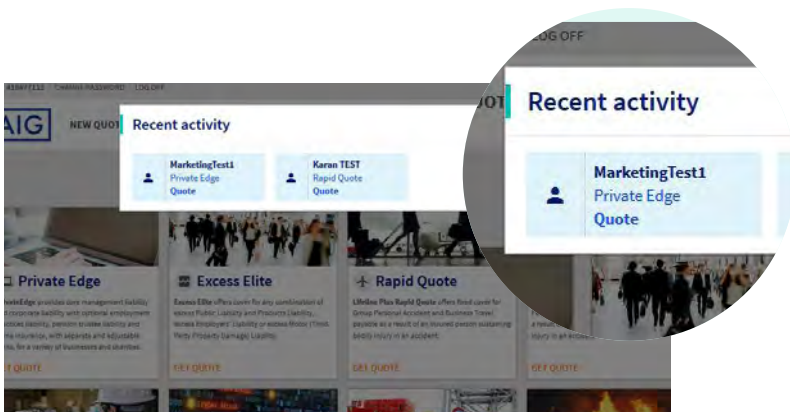
Validation Summary

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.



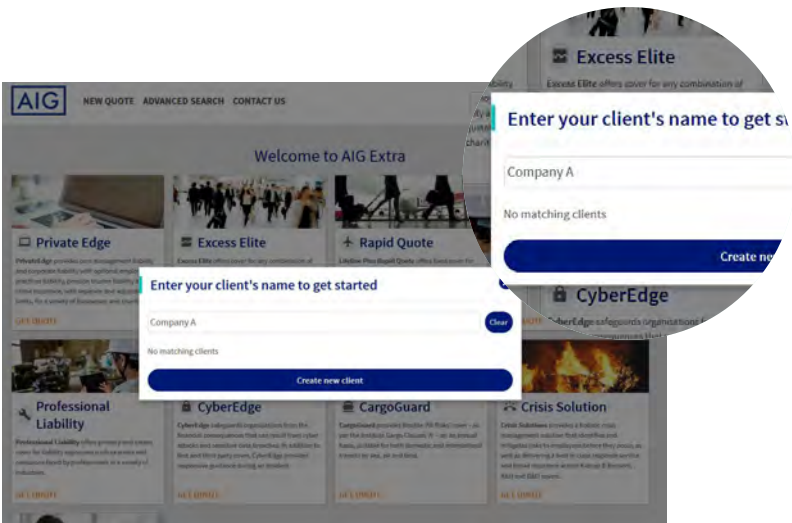
Read-Only Risk Review

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.

Update Details

If any other client details need updating, please adjust any policies an

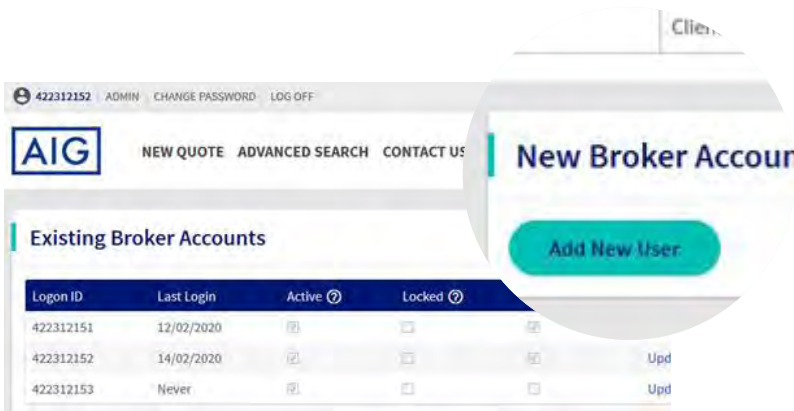
Contact email address (optional)

Contact phone number (optional)

Broker Reference (optional)

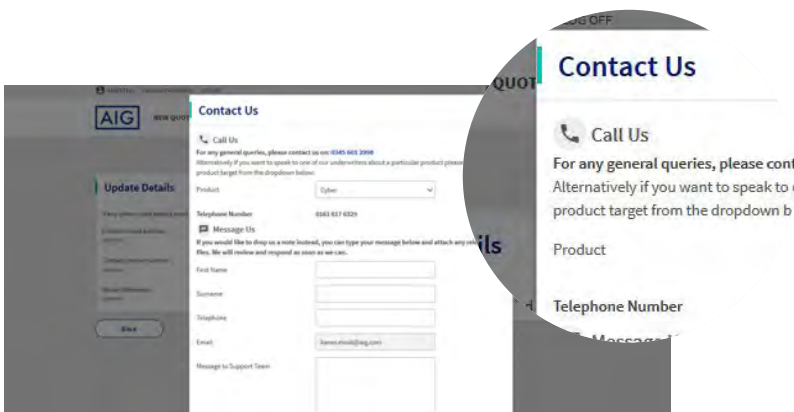
Back

Usability Improvements continued



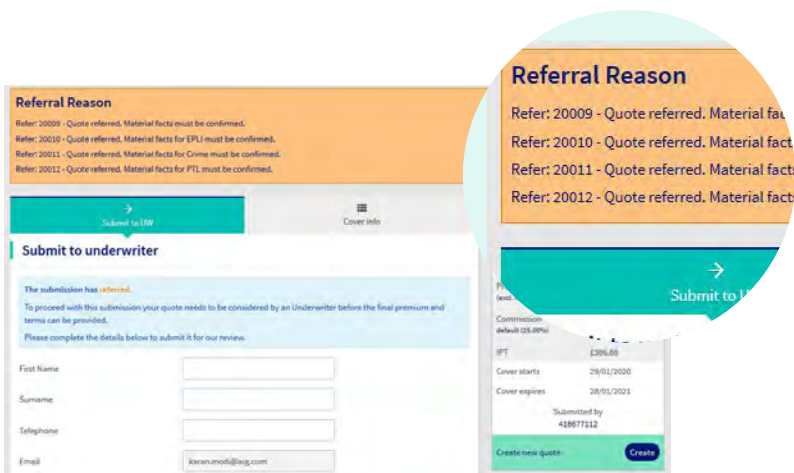
User Admin

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.



Refined Contact Us

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



Quote/Policy Summary/Refer/Decline

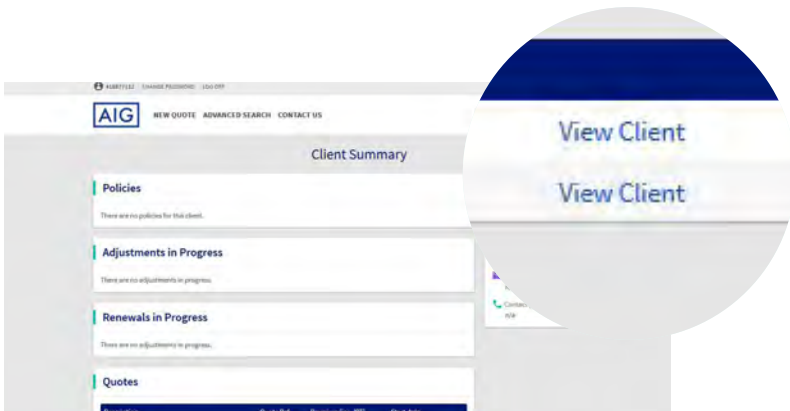
We've made it easier to understand why a quote has been referred or declined with clear notifications at the top of the page. These notifications occur across the platform to ensure you know what the issue with a submission is and how it can be resolved.



Edit Term Dates

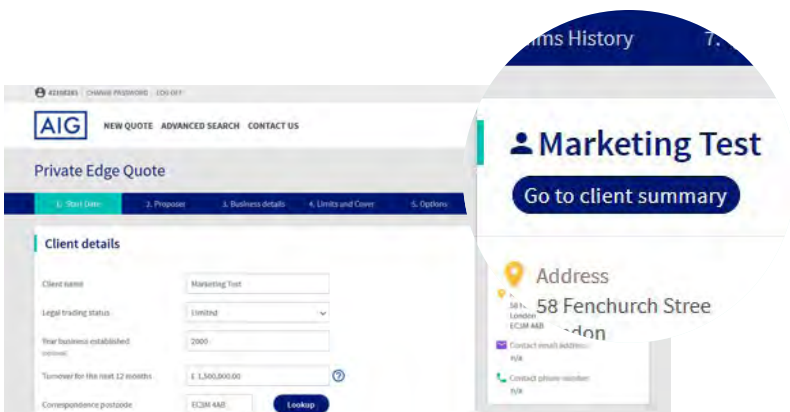
This feature allows you to edit a quote's effective dates without going back to the first page of the risk capture form.

Information Improvements



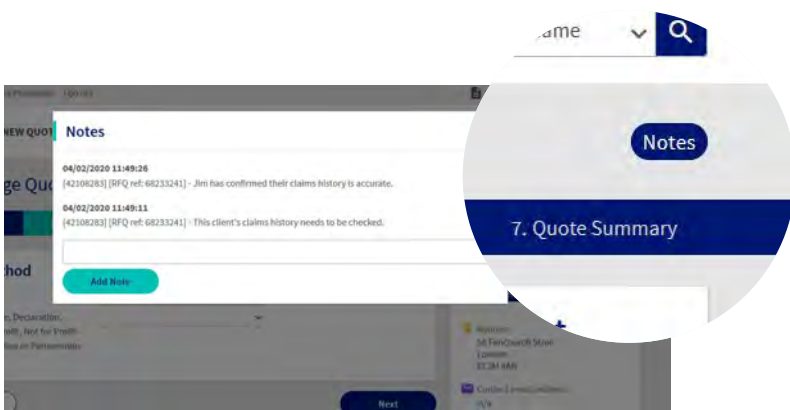
Client Summary

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.



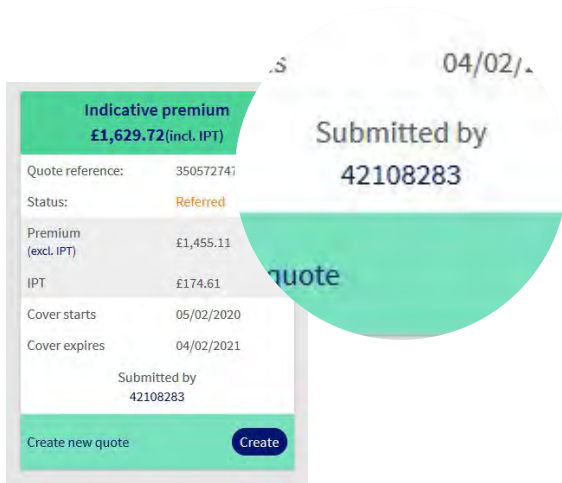
Client Info Side Box

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.



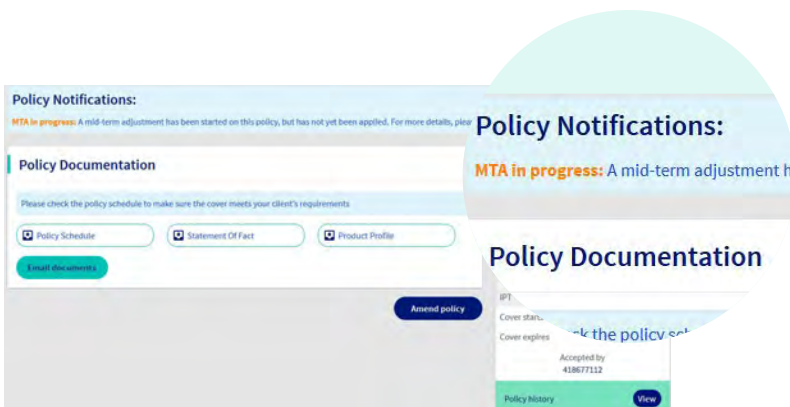
Broker Notes

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.



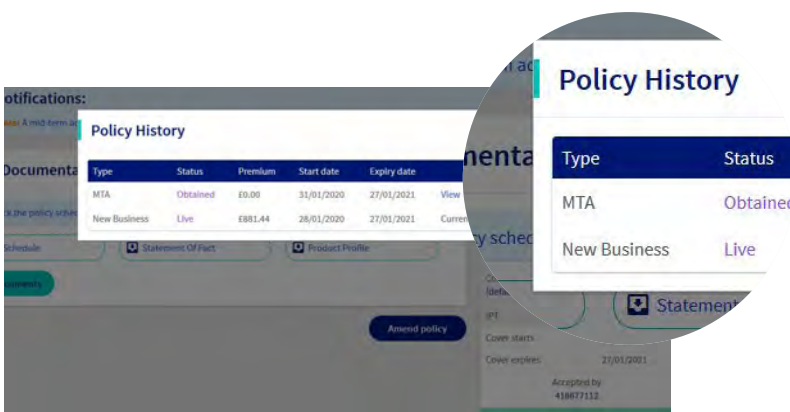
Transaction Stamping

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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