

GTOM Training Guide

Module 2: Manage & Enquiry

AXA Asia – General Insurance

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Content Page

■ Manage Page

- Overview
- Workbasket
- Manage Page

■ Enquiry

- Overview
- Quick Search
- Policy Search
- Client Search
- (Search from Workbasket – under Manage Page)

Overview of Manage page

The screenshot shows the 'Manage my policies' page. At the top, there's a navigation bar with 'PRODUCTS', 'MANAGE' (highlighted in red), 'CLAIMS', 'REPORTS', and a 'SEARCH' button. Below the navigation bar, the page title 'Manage my policies' is followed by a sub-header 'This section will enable you to create, renew, endorse or cancel your different policies with AXA.' The main content area is divided into three sections: 'Search', 'To Do (14*)', and 'On Going (11)'. The 'Search' section has a 'Query' dropdown menu with 'Client Name' and 'Product Name' options, and a 'SEARCH' button. The 'To Do' section is titled 'Motor' and lists 'Convert CI (3)', 'Endorsement (3*)' with status icons, 'Quotation (6)', and 'Renewal (2)'. The 'On Going' section is also titled 'Motor' and lists 'Pending items (11)'. A 'History' section at the bottom is titled 'Motor' and lists 'Last 30 days'. Blue arrows point from the text on the right to the 'SEARCH' button, the 'Query' dropdown, the 'To Do' section, the 'On Going' section, and the 'History' section.

Most users will generally have their Manage page with the following features:

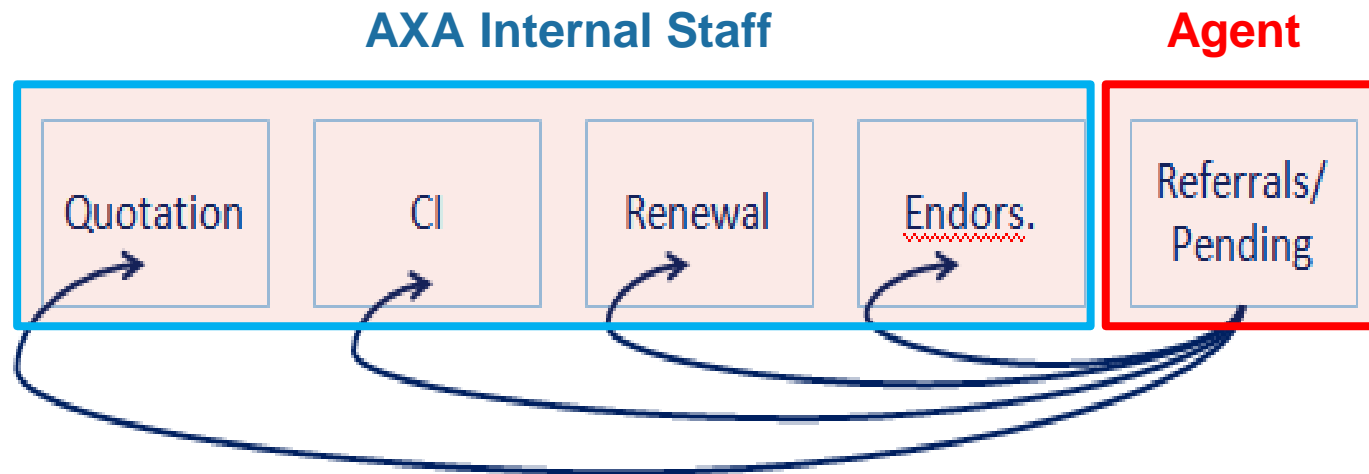
- **Search bar:** only searches completed transactions
- **Search/Query:** will perform search enquiry on any On-Going Cases (to do, on going cases) and are yet to be completed as a transaction. The search enquiry can be based on policy or client details.

Agent can view and take action in their “workbasket:

- **To Do** – Cases pending the owner to take action
- **On Going** - Waiting for the other party to action
- **History** - 30 days history view (*to view beyond 30 days, please go to Search)

Workbasket Flow

- The below diagram illustrates the overall flow between the agent and AXA workbaskets throughout the lifecycle of a transaction or case
- Throughout the lifecycle, a case may flow between agents and AXA staff in order to be finalised. This will be explained more in the Manage sections of this document & later sections of Endorsement and Renewals.



Sample Workbasket View: Agent

MOTOR: On Going

REFERRED

	Account Code	Instruction Date	Completion or Returned Date	Quotation or Policy Number	Policyholder Name	Policyholder ID Num.	Product Name	Product Plan	Case Status	Transaction Type	Referral Type
<input checked="" type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility
<input type="checkbox"/>	AC1234M	05/04/2013	05/04/2013	AX-HM-12A001234-SG	James Tan	S1234567L	SD Comprehensive	Flexi	P*-Issuance	Endorsement	Eligibility

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- Cases are arranged in the workbaskets according to level of priority where the highest priority are displayed first. The priority levels are colour coded according to:
 - Red – need prompt action (e.g. a Quotation about 12 days old will be flagged red as it will expire after 14 days)
 - Amber – midway of duration
 - Green – new cases
- If a case is no longer available for action but still can be viewed in the workbasket, it will be colour coded grey.

Color Code	Quotation	Renewals	CI Conversion	Referred
Red	11-14 days	T- 14 days	45-60 Days	>3 days
Amber	0-10 days	T- (15 to 28) days	30-44 Days	2-3 days
Green	--	T- (29 to 60) days	0-29 Days	<1 days
Grey	15-30 days	--	>60 Days	--

Agent – Manage Page

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PRODUCTSMANAGECLAIMSREPORTSSEARCH

Manage my policies

This section will enable you to create, renew, endorse or cancel your different policies with AXA.

Search

Query

Client Name

Product Name

+ add another criteria

SEARCH

To Do (14*)

Motor

Convert CI (3)
Endorsement (3*)
Quotation (6)
Renewal (2)

✓ (1)

✗ (2)

⚠ (2)

On Going (11)

Motor

Pending items (11)


History

Motor

Last 30 days

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Agent – CI Conversion

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PRODUCTSMANAGESEARCH

Motor

CONVERT CI

	Policy Number	Product Name	Product Plan	Policy Holder Name	Policy Holder ID	Vehicle Registration Number	Issue Date	Premium	CI Expiry Date
<input type="checkbox"/>	GA004987	SmartDrive	For Her	NWBTC qwewqe	S8369095Z	SWE1234F	14/01/2014	\$1,453.00	28/01/2014
<input checked="" type="checkbox"/>	GA005057	SmartDrive	Flexi	Edward Kenway	S7906871C	62211634	16/01/2014	\$6,434.00	30/01/2014
<input type="checkbox"/>	GA005565	SmartDrive	Flexi	dfsdfsd sdfsdsv	S0728974Z		27/01/2014	\$1,015.00	10/02/2014

Convert CI

Email

PDF

Export

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| CLOSE |

On Going

Motor

Agent – Endorsement

Motor

ENDORSEMENT

	Policy Number	Product Name	Product Plan	Policy Holder Name	Vehicle Registration Number	Policy Holder ID	Effective Date	Endorsement Premium	Case Status	Returned Date
<input type="checkbox"/>	GA005031	SmartDrive	Peace	TAN LIN	MBB8861	S9404709I	21/01/2014	\$4,118.58	Pending-Submission	
<input type="checkbox"/>	GA005273	SmartDrive	Peace	HJKO HJHJJ	sh23434	S8380807A		\$2,932.00	Pending-Submission	

Display


Export

Withdraw

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Agent - Quotation


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PRODUCTS
MANAGE
SEARCH

Motor

NEW BUSINESS


	Account Code	Quotation Number	Policy Holder Name	Policy Holder ID	Product Name	Product Plan	Annual Premium	Case Status ▲	Returned Date
<input type="checkbox"/>	04848	AXA-MTR-SG-2014-2367		S8576673B	SmartDrive	For Her	3,549	Approved	03/02/2014
<input checked="" type="checkbox"/>	04848	AXA-MTR-SG-2014-2456		S7877691I	SmartDrive	Essential+	4,096	Approved	04/02/2014
<input type="checkbox"/>	04848	AXA-MTR-SG-2013-797	k Kale	351329736	SmartDrive	Flexi Family	4,307	Pending-Acceptance	
<input type="checkbox"/>	04848	AXA-MTR-SG-2013-805	Ramesh Hunilatu	S8727434I	SmartDrive	Flexi Family	4,220	Pending-Acceptance	
<input type="checkbox"/>	04848	AXA-MTR-SG-2013-811	PT<EOF> TEST	S8035002C				Pending-Acceptance	
<input type="checkbox"/>	04848	AXA-MTR-SG-2013-812	PT<EOF> TEST	S8035002C				Pending-Acceptance	
<input type="checkbox"/>	04848	AXA-MTR-SG-2013-813	PT<EOF> TEST	S8035002C				Pending-Acceptance	

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Convert C
 Cancellation
 NCD Verification

Agent - Renewal


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PRODUCTS

MANAGE

SEARCH

Motor

RENEWAL

	Policy Number	Product Name	Product Plan	Policy Holder Name	Policy Holder ID	Vehicle Registration Number	Expiry Date	Renewal Premium	Case Status	Returned Date	Renewal Offer #
<input type="checkbox"/>	P1341032	SmartDrive	Private MPV (APW)	KBXL SHE KHPZL K.S.	S1515082C	SFR8480D	09/02/2014	\$1,240.00	Pending-Renewal		AXA-MTR-SG-REN-2014-8284
<input type="checkbox"/>	P1340526	SmartDrive	Private APW	EIX EKHPZ EIPZ		SFL5209Z	09/02/2014	\$1,402.00	Pending-Renewal		AXA-MTR-SG-REN-2014-8316
<input type="checkbox"/>	P1229962	SmartDrive	Private APW	YIL ZAIX OHS		SJN2867K	10/02/2014	\$2,237.00	Pending-Renewal		AXA-MTR-SG-REN-2014-10078
<input checked="" type="checkbox"/>	P1089628	SmartDrive	Private APW	MLJH SIL OAIPIZ		SJH5441S	12/02/2014	\$979.00	Pending-Renewal		AXA-MTR-SG-REN-2014-10185
<input type="checkbox"/>	P0752958	SmartDrive	Private APW	YBH APZ MLIN		SFF5132S	12/02/2014	\$824.00	Pending-Renewal		AXA-MTR-SG-REN-2014-9463
											AXA-MTR-SG-

Renew

Email

PDF

Export

Withdraw

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CLOSE

On Going

Motor

Agent – On Going

Motor: Referral

CANCELLATION		ENDORSEMENT REQUEST		ENDORSEMENT		QUOTATION	RENEWAL	
Policy Number	Product Name	Product Plan	Policy Holder Name	Policy Holder ID	Vehicle Registration Number	▲ Premium Before Referral	Case Status	Referral Type
<input type="checkbox"/> P0394285	SmartDrive	Private MPV	KHAF XBJP FAA	S0607076J	SBB9888L	\$2,054.00	Pending-Review	
<input type="checkbox"/> P1047021	SmartDrive	Private MPV	VBP KAPZ SJNX XIPZ	S1789544C	SBD828J	\$2,509.00	Pending-Review	
<input type="checkbox"/> P0761908	SmartDrive_T P	Third Party Only	XLIIP MLAA ELHPZ		SBH5623D	\$895.00	Pending-Review	
<input type="checkbox"/> P1048978	SmartDrive	Private MPV	EAPZ LANP OAA	S1779034Z	SBJ9088L	\$4,758.00	Pending-Review	
<input type="checkbox"/> P1173491	SmartDrive	Private MPV	OAIKZ KAPZ KAIF	S0152277I	SBJ96Y	\$2,665.00	Pending-Review	

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Agent – History View

MOTOR: History (last 30 days)

CI CONVERSION ENDORSEMENT QUOTATION RENEWAL									
	Policy Number	Product Name	Product Plan	Policyholder Name	Policyholder ID Num.	Vehicle Regis.Num.	Issue Date	Premium	Expiry Date
<input checked="" type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive Comprehensive	Flexi	James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPFT		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPFT		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPO		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive Comprehensive	Flexi+	James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive Comprehensive	Savvy	James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive Comprehensive	For Her	James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPFT		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPO		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013
<input type="checkbox"/>	AX-HM-12A001234-SG	SmartDrive TPO		James Tan	S1234567L	SD1234D	05/04/2013	\$2013.00	05/04/2013

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Enquiry



Enquiry Overview

- **The following enquiry types to be covered:**
 - Initiate Search
 - Policy Search
 - Client Search
 - Workbasket Search from Manage page



Search for Completed Transactions

- A user can initiate a search by going to the top right corner from the landing or manage page and clicking on the search icon
- This Search function is to **Search for Completed Transactions**

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Sign Out

PRODUCTS **MANAGE** CLAIMS REPORTS **SEARCH**

Manage my policies

This section will enable you to create, renew, endorse or cancel your different policies with AXA.

Search

Query

Client Name

Product Name

+ add another criteria

SEARCH

To Do (14*)

Motor

Convert CI (3)

Endorsement (3*) ✓ (1) ✗ (2)

Quotation (6)

Renewal (2) ⚠ (2)

On Going (11)

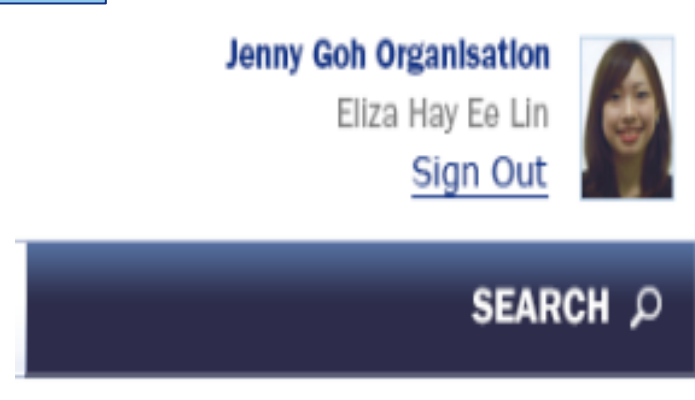
Motor

Pending items (11)

History

Motor

Last 30 days



Policy Search

Search

POLICY CLIENT

Query Policy Number Equal

END

SEARCH ► | CANCEL

The following attributes will be available in a policy search for a user to select :

- Policy #
- ID #
- Comp. Reg. #
- Quotation #
- Veh. Reg. #
- Chassis #
- Engine #
- Product type (VA1, VA2, VA3)
- Intermediary Code
- Inception Date From / To
- Expiry Date From / To
- Transaction Date From / To
- Transaction type (NB, END, REN, CI)
- Case status

Policy Search

Search

POLICY

CLIENT

Query

Policy Number

OR

Product Type

END

SEARCH

|

BACK

Policy Search

Search

POLICY

CLIENT

Query

Policy Number

OR

Product Type

AND

Inception Date From

AND

Intermediary Code

SEARCH

BACK

Policy Search

Search

POLICY **CLIENT**

Query

OR

AND

END

AND

END

SEARCH | [BACK](#)

Policy Search

Search

POLICY

CLIENT

Query

Quotation Number

OR

Product Type

AND

Inception Date From

AND

Inception Date To

MOTOR

2/3/2014

2/13/2014

SEARCH

BACK

Policy Search Results - Multiple

Search

POLICY

CLIENT

Results

	Policy Number	Quotation Reference	Intermediary Number	Intermediary Name	Product	Product Type	Plan	Case Status	Transaction Date	Insurance From	Insurance To	Client Name	User ID
<input checked="" type="checkbox"/>	P0922369		05254	JMN HPKBNJPM A JZAPMT	Private Motor	VPA		Awaiting Renewal	13/02/2014	08/04/2014	07/04/2015	XAA KFAA EAI	
<input type="checkbox"/>	P1361883		05254	JMN HPKBNJPM A JZAPMT	Private Motor	VPA		Awaiting Renewal	13/02/2014	05/04/2014	04/04/2015	XIF XHJ OHS	
<input checked="" type="checkbox"/>	P0927245		05254	JMN HPKBNJPM A JZAPMT	Private Motor	VPA		Awaiting Renewal	13/02/2014	09/04/2014	08/04/2015	KFA LAPZ EJP	
				JMN									

View

Export

Endorse

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Policy Search Detail – Single

Search

POLICY

CLIENT

Results

	Policy Number	Quotation Reference	Intermediary Number	Intermediary Name	Product	Product Type	Plan	Case Status	Transaction Date	Insurance From	Insurance To	Client Name	User ID
<input checked="" type="checkbox"/>	GA008824	AXA-MTR-SG-2014-4115	05262	HPKBNA OHPX YEA OEQ	Private Motor	VA1	SmartDrive_Flexi	In-force	13/02/2014	01/03/2014	28/02/2015	TRAINER TERRENCE	04247006

View

Export

Endorse

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Policy Search Results

– Policy Transaction Details

PEGA Testing001

Search

POLICY **CLIENT**

Results

Transaction Number	Pega Transaction Number	Transaction Type	Transaction Date	Insurance From	Insurance To	Gross Premium	Commission
<input type="checkbox"/> 1		NB	01/01/2014	08/03/2012	07/03/2013	2662.4	425.99

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New Business

Client Search

Search

POLICY CLIENT

Query Client Number

END

SEARCH | BACK

The following provides an indication of the filters available in a client search:

- Client #
- Policy #
- Quotation #
- Client Given Name
- Client Surname
- Date of Birth
- Client Type
- ID#
- Company Reg. #
- Vehicle Reg #
- Mobile #



Client Search

Search

POLICY

CLIENT

Query

Client Number

Client Number

Policy Number

Quotation Number

Client Given Name

Client Surname

Date Of Birth

Client Type

ID Number

Company Registration Number

Vehicle Registration Number

Mobile Number

SEARCH

|

BACK

Client Search

Search


POLICY CLIENT

Query Client Given Name Train

END



Client Search Results

 PEGA Testing001

Search

POLICY

CLIENT

Results

	Client Name	Client Number	DOB	Address	Policy Number	Product Type	Transaction Date	
<input type="checkbox"/>	TRAIN STATION SMRT REDHILL	1676735	11/02/1980	TRAIN STATION , , ,	P1433169	VPA	01/01/2014	
<input checked="" type="checkbox"/>	TRAIN STATION SMRT REDHILL	1676735	11/02/1980	TRAIN STATION , , ,	P1433168	VPA	01/01/2014	
<input type="checkbox"/>	TRAINER TRAINER	1679148	02/03/1970	33 THE ROAD , , , 069415	GA008818	VA3	13/02/2014	

View

Policy Details

Export

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PREVIOUS

 |

HOMEPAGE

Renewal

Client Search Result Details – Individual

AXA

PEGA Testing001

Search

POLICY

CLIENT

Results

Client Number

1676735

Name

TRAIN STATION SMRT REDHILL

Gender

☒ Male ☐ Female

Display Name

GivenName + Surname

Date of Birth

11

February

1980

Phone

Email

Plan

Transaction Date

01

January

2014

Type

☒ Individual

FIN / NRIC

Country

SIN

Postal Code

Address

TRAIN STATION

Case Status

In-force

Policy Details

Endorse

PREVIOUS

|

HOMEPAGE

New Business

Client Search Results – Policy Transaction Details

PEGA Testing001

Search

POLICY **CLIENT**

Results

Transaction Number	Pega Transaction Number	Transaction Type	Transaction Date	Insurance From	Insurance To	Gross Premium	Commission
<input type="checkbox"/> 1		NB	01/01/2014	08/03/2012	07/03/2013	2662.4	425.99

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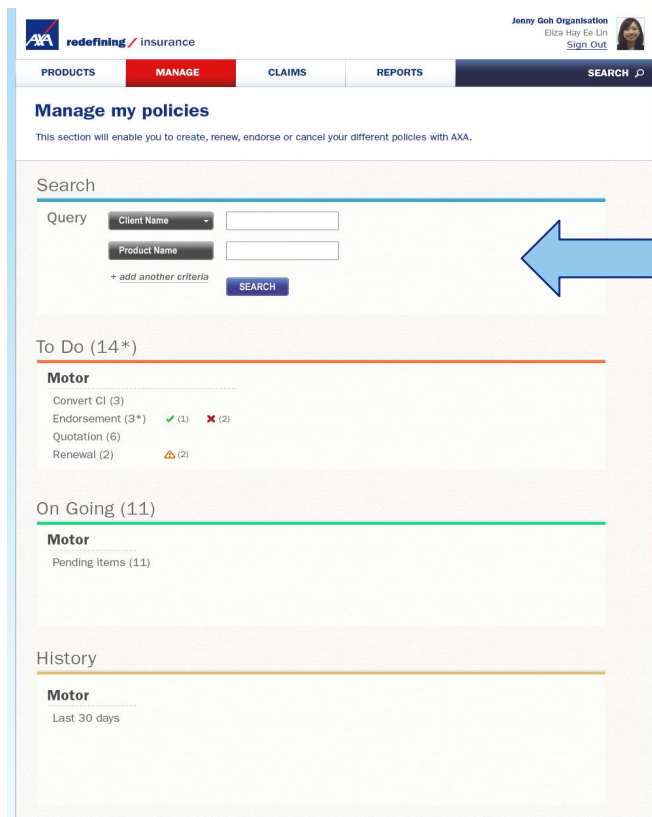
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New Business

Quick Search for On-Going Cases

- To search for On-Going Cases (To Do, On Going Cases) that are yet to be completed as a Transactions, the User (Agent) need to use the **Quick Search Function in their Manage Page** to search



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PRODUCTS **MANAGE** CLAIMS REPORTS SEARCH

Manage my policies

This section will enable you to create, renew, endorse or cancel your different policies with AXA.

Search

Query

Client Name

Product Name

+ add another criteria

SEARCH

To Do (14*)

Motor

Convert CI (3)

Endorsement (3*) ☒ (1) ☒ (2)

Quotation (6)

Renewal (2) ☒ (2)

On Going (11)

Motor

Pending Items (11)

History

Motor

Last 30 days



Quick Search

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PRODUCTS **MANAGE** CLAIMS REPORTS SEARCH

Manage my policies

This section will enable you to create, renew, endorse or cancel your different policies with AXA.

Search

Query **Client Name**

Product Name

+ add another criteria **SEARCH**

To Do (14*)

Motor

Convert CI (3)

Endorsement (3*) ✓ (1) ✗ (2)

Quotation (6)

Renewal (2) 🔥 (2)

On Going (11)

Motor

Pending items (11)

History

Motor

Last 30 days

Manage Page Quick Search Filters - Agent / Intermediary

- 1 Policy holder name
- 2 Policy holder NRIC/FIN/Co Reg #
- 3 Quotation number
- 4 Policy number
- 5 Vehicle Registration No.
- 6 Line of Business (For Future)

Quick Search

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Self Service Sign Out

PRODUCTS **MANAGE** SEARCH

Manage my policies

This section will enable you to create, renew, endorse or cancel your different policies with AXA.

Search

Query

Motor

CONVERT CI	ENDORSEMENT	QUOTATION	RENEWAL	PENDING				
Policy Number	Product Name	Product Plan	Policy Holder Name	Policy Holder ID	Vehicle Registration Number	Issue Date	Premium	CI Expiry Date
No items								

Convert CI Email PDF Export

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| CLOSE |

Motor

Pending Items

History

Motor

Last 30 Days

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Thank You!

