



User Guide for B2B Portal

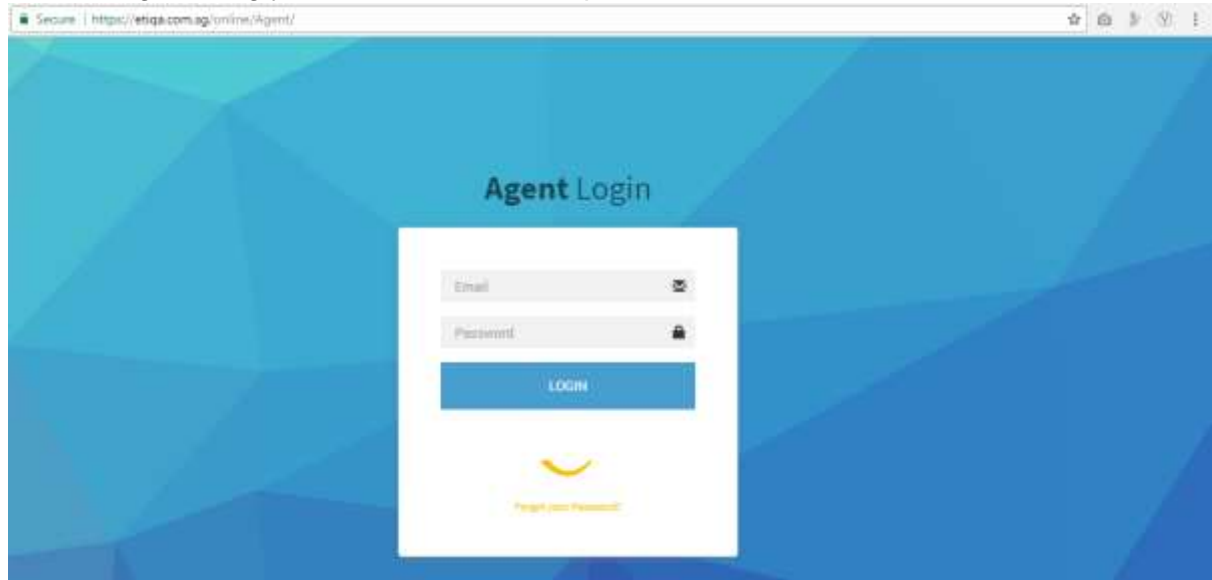
v1.1

1.0 GETTING STARTED

1.1 Logging On

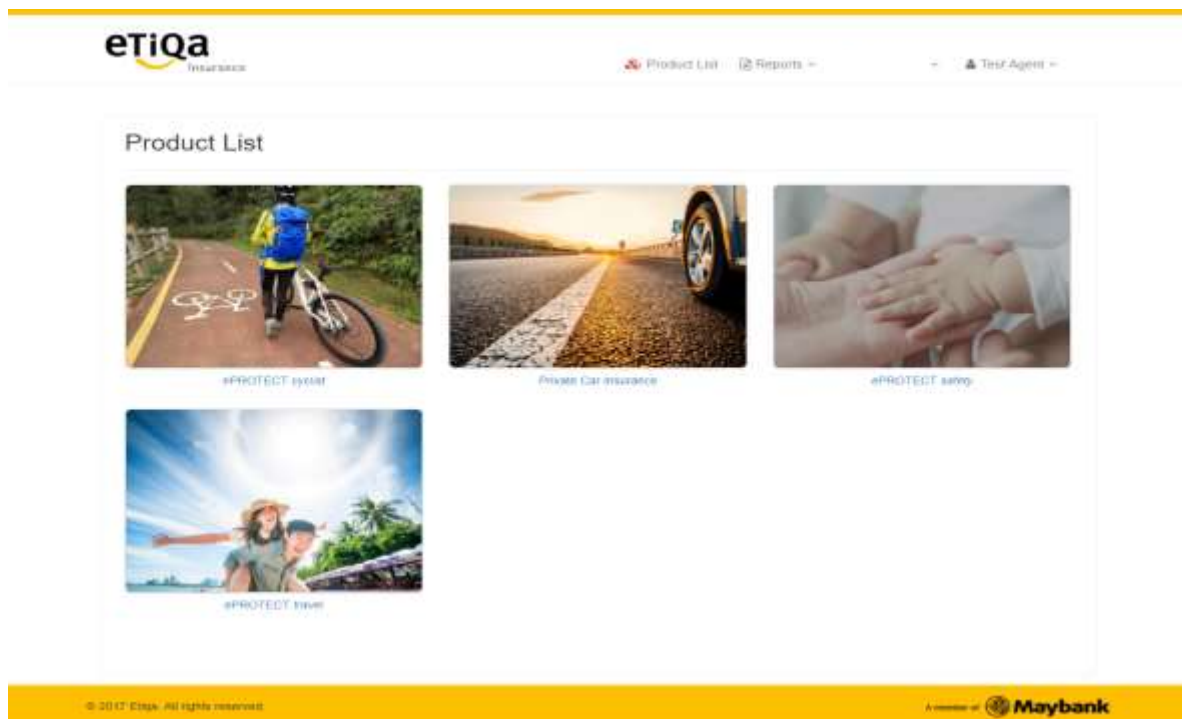
1.1.1 Access the Portal through <https://www.etiga.com.sg/online/Agent/>

1.1.2 Log in using your email address and password

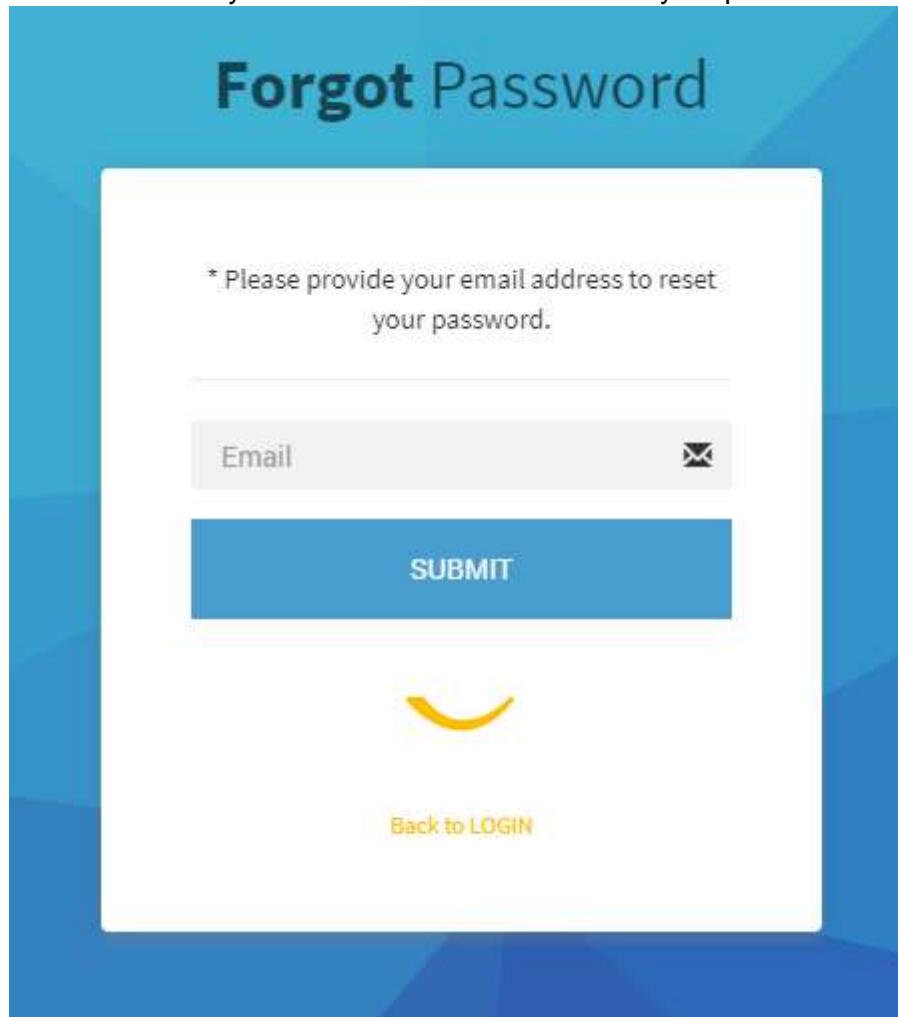


Initial Password will be sent to your email address.

1.1.3 Upon clicking the LOGIN button, the homepage will be displayed



- 1.1.4 If password is forgotten, click Forgot your Password? and supply the email address. System will send an email to reset your password.

A screenshot of a web form titled "Forgot Password" in a large, bold, dark blue font. The form is set against a light blue background with a subtle geometric pattern. Inside the form, there is a text prompt: "* Please provide your email address to reset your password." Below this is a text input field with the placeholder text "Email" and a small envelope icon on the right. Underneath the input field is a solid blue button with the word "SUBMIT" in white, uppercase letters. At the bottom of the form, there is a yellow curved line graphic and a link that says "Back to LOGIN" in yellow text.

Email to reset the password

Dear Member of Etiqa's online platform,

We received a request to reset your password.

User ID: Etiqa@yahoo.com

Please click [here](#) to set a new password.

If you did not request for a password reset, please contact us at 68000000 (or) email to customer.service@etiqa.com.sg.

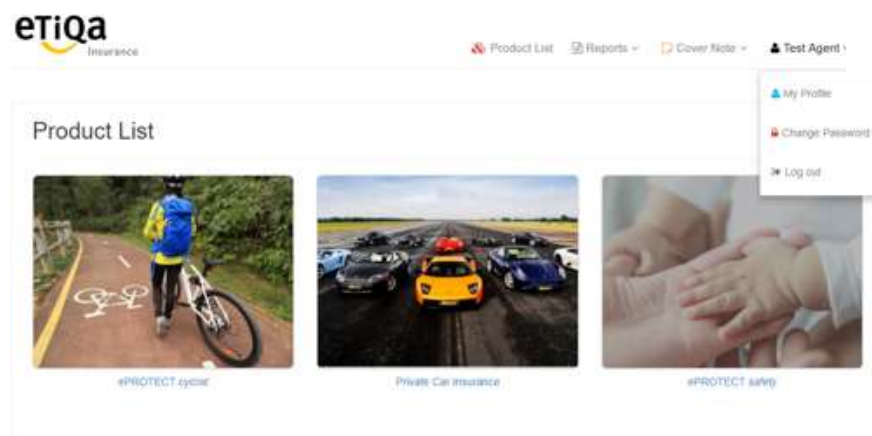
Best regards,
Etiqa Insurance Pte Ltd

1.2 System Menu

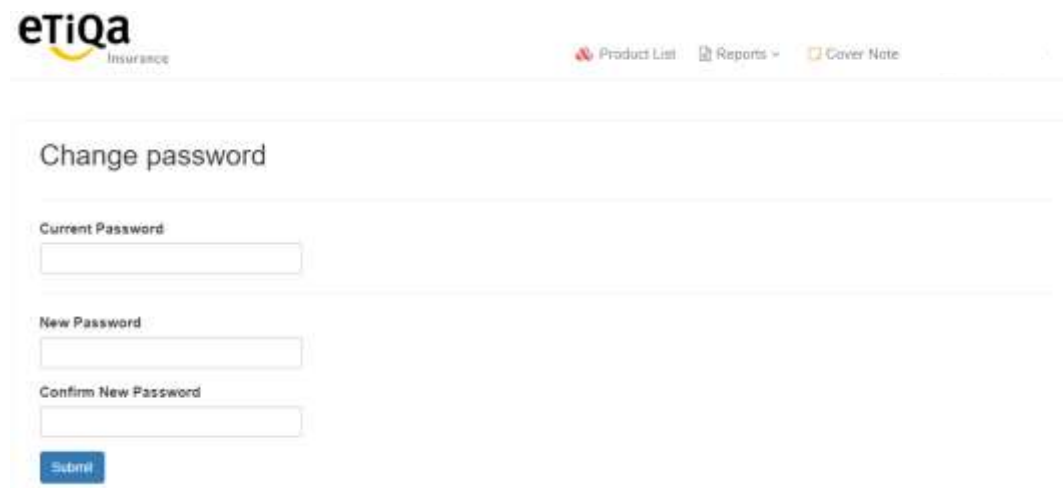
	Menu	Function
1	Product List	<ul style="list-style-type: none">• Displays available products• Sales Quotation• New Business application• Credit Card Payment
2	Reports	<ul style="list-style-type: none">• Displays list of applications submitted per product• Search facility• Filter based on start date• Download of applications report
3	Profile	<ul style="list-style-type: none">• Displays user and agent profile• Change of Password• Log out of System

1.3 Changing Password

1.3.1 Go to Profile Tab and Select Change Password in the dropdown list



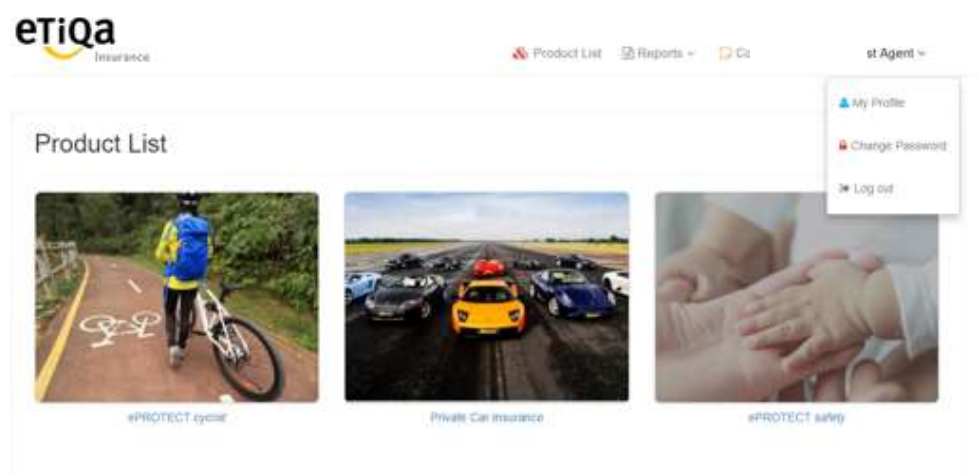
1.3.2 Supply the current and new passwords then click Submit button



You will be automatically logged out and will be required to log in using the new password.

1.4 Exit System

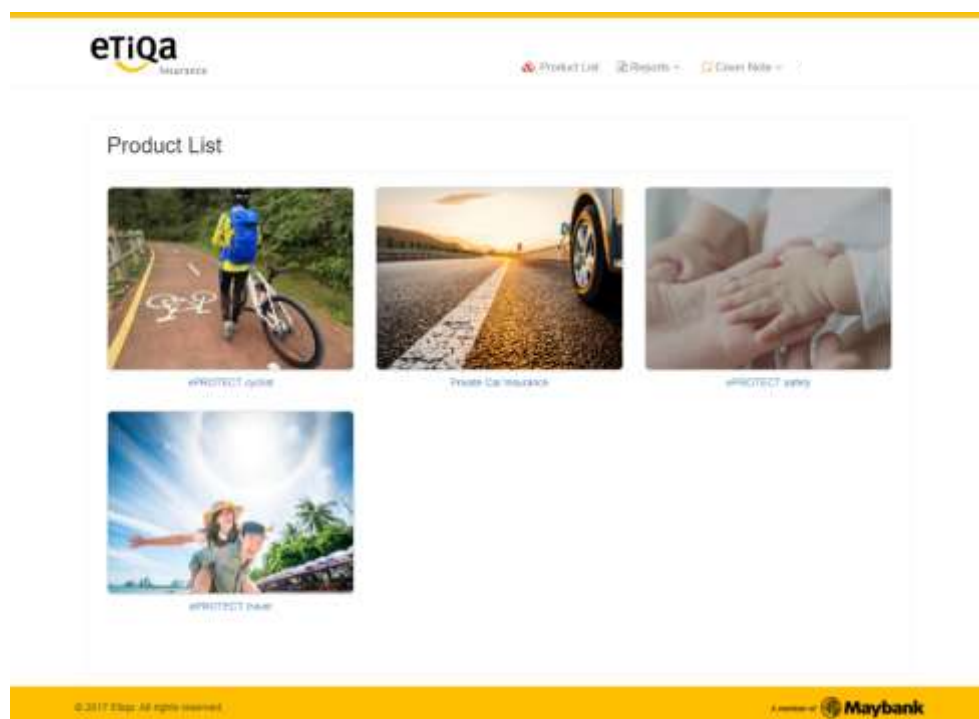
1.4.1 Go to Profile Tab and Select Log out in the dropdown list



2.0 USING THE SYSTEM

2.1 Submission of a New Business Application
(Quotation -> Plan Selection -> Summary -> Application -> Payment)

2.1.1 Select the Product



- 2.1.2 Read the eligibility conditions and conditions are fulfilled
A link to display and download the Policy Wording is also available on this page.

Eligibility Conditions

1

The insured or any additional drivers are residents of Singapore possessing a valid NRIC/FIN.

2

The main driver of the car is aged between 24 to 75 and has a valid driving licence of at least 2 years.

3

No driver has had any class of licence suspended or cancelled in the last 3 years.

4

The car is registered in Singapore and any modifications it may have are LTA compliant.

5

The car is not used for commercial purposes, hire, reward, rental or lease.

6

The insured or any additional drivers have never been refused, declined renewal or terminated for car insurance by any insurers.

7

The insured or any additional drivers have never had more than 2 claims or total claim amount exceeding \$5,000 in the last 3 years.

For more information, please view our [Policy Wording](#).

☒ The insured fulfil all the requirements

☐ The insured do not fulfil all of the above requirements

Important Note:

Kindly note that the purchase of requires transmissions to LTA. Hence, processing is only available from Monday to Friday, before 3.30pm. Application received after 3.30pm will be processed on the next working day. Also, processing is not applicable on public holidays.

- 2.1.3 If insured fulfills all conditions, Select that option and Click Submit button

☒ The insured fulfil all the requirements

☐ The insured do not fulfil all of the above requirements

Important Note:

Kindly note that the purchase of requires transmissions to LTA. Hence, processing is only available from Monday to Friday, before 3.30pm. Application received after 3.30pm will be processed on the next working day. Also, processing is not applicable on public holidays.

Submit

- 2.1.4 In the quotation page, review the default values, change if necessary and click START button. A link to display and download the Policy Wording is also available on this page.

Quote Us

The insured is **Married** • **Male** • born in **24/07/1977** • The insured is **Manager / Professional** • and drive an **Non Off-Peak** • **TOYOTA VIOS 1.5 E (A)** • first registered in **2015** • The Insured has been driving for **5** • years, is **Demerit Points Free** • and his or her No Claim Discount is **50%** • The Insured has **0** • additional named driver(s) with **0** • Claim(s) for the past 3 years. The policy should be effective from **24/07/2017** to **23/07/2018** •

Start

* For more information:

[Click Here](#)

Click on link to policy wording for more information on the product

- 2.1.5 Select the plan and Click Buy button
To modify the details, click on the Edit Quote button

Pick the Plan

The Selections	Comprehensive (Authorised Workshop)	Third-Party Fire & Theft	Third Party Only
Start Date: 24/07/2017 End Date: 23/07/2018 NCD Entitlement: 50% No. of additional driver(s): 0	\$813.39	\$715.35	\$567.41
Edit Quote	Buy	Buy	Buy

- 2.1.6 Select Add Ons by clicking on the tick box

Add Ons

Premium: \$956.93

Flexi Commission : 15%

0%
25%

Adjustable Excess : \$800

\$200
\$2500

Workshop

Additional Excess for elderly, young and inexperienced driver is \$54,000 for any workshop

☒

Sun/Moon Roof

Cover the damage to sun/moon roof (up to \$52,000)

☐

For Private Motor, aside from Additional Risks that may be covered, premium can be adjusted by manipulating the Flexi Commission Percentage and/or Excess Amount.

2.1.7 If you wish to save the quotation, click on the 'Save Quote' button

Add Ons

Premium: \$734.67

Flexi Commission : 15%

0%
25%

Adjustable Excess : \$800

\$200
\$2500

Workshop

Additional Excess for elderly, young and inexperienced driver is \$54,000 for any workshop

☐

Sun/Moon Roof

☐

Solar Film

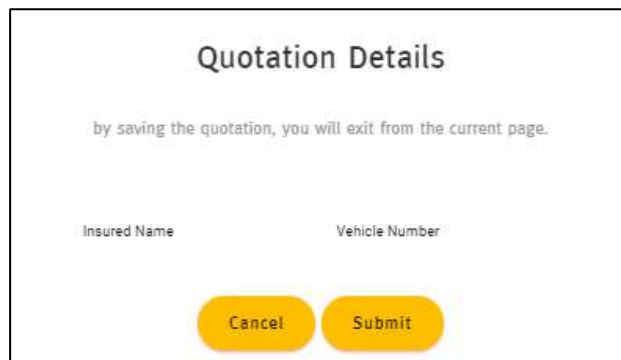
☐

NCO Protector

☐

Back
Save Quote
Next

2.1.8 Upon clicking the 'Save Quote' button, a pop-up screen will launch. Fill up the Insured Name and Vehicle Number. Then click on 'Submit'



A pop-up window titled "Quotation Details". Below the title, it says "by saving the quotation, you will exit from the current page." There are two input fields: "Insured Name" and "Vehicle Number". At the bottom, there are two yellow buttons: "Cancel" and "Submit".

2.1.9 System will generate the quotation slip. Click on the Quotation number button and it will launch the quotation slip in pdf format. You can click on the pdf to open the file.



A screen titled "Download Quotation Slip". It includes a thank you message: "Thank you for your continuous support of Eopa Insurance." and instructions: "Click on the button below to start downloading the Quotation Slip. You can also review it under the 'Agent Sales Report' section." There is a yellow button labeled "Download". At the bottom, a red arrow points to a PDF file icon and the text "Q00000111.pdf" in a file explorer bar.

2.1.10 User can download, save or print the Quotation

Important Notice

1. This quotation is given without any obligations and will remain valid for 7 days from date of quotation. No insurance is in force until the proposal is accepted by the Company.
2. Premium Before Cover Warranty
Applicable to proposed insured who is an individual. Agent/broker who submit the quotation will be deemed to have collected payment from the proposed insured.
3. EXCESS CLAUSE
At the time of loss, if the insured vehicle is driven by any authorized person (other than insured or named driver) who is:
 - a. under the age of 24; or
 - b. above the age of 75; or
 - c. who has held a full driving licence for less than 2 years,
 - i. An additional excess of S\$2,000.00 (Section I) will be imposed on top of the policy excess if cover under Authorized Workshops Scheme.
 - ii. An additional excess of S\$4,000.00 (Section I) will be imposed on top of the policy excess, if cover under Non-Authorized Workshops Scheme.
4. Geographical Excess for Stolen Vehicle
An additional excess of \$2,000.00 on Section I will be imposed on top of the policy excess if vehicle is stolen whilst driven outside of Singapore.
5. Annual Premium Payable for the Period is inclusive of GST and discounts (if applicable)

POLICY OWNERS' PROTECTION SCHEME

1. This policy is protected under the Policy Owners' Protection Scheme which is administered by the Singapore Deposit Insurance Corporation (SDIC). Coverage for your policy is automatic and no further action is required from you. For more information on the types of benefits that are covered under the scheme as well as the limits of coverage, where applicable, please contact your insurer or visit the GIA / LIA or SDIC websites (www.gia.org.sg or www.lia.org.sg or www.sdic.org.sg).

Date of Quotation	: 11/10/2017	Agent/Broker	: abdul sani bin abdul kudas
Reference No.	: Q000016	Account Code	: 90000001
Particulars of Proposer			
Name	: DHI		
Date of Birth	: 11/10/1977	Gender	: Male
Occupation	: Indoor	Driving Experience	: 5 year(s)
Existing Policy NCD	: 50%	Demerit Points Free Discount	: Yes
Particulars of Vehicle			
Year of Registration	: 2015		
Make of Vehicle	: TOYOTA	Vehicle Model	: TOYOTA VIOS 1.5 E (A)
Engine Capacity	: 1497	No. of named driver(s)	: 0
		(For young and inexperienced drivers, we reserve our rights to vary the terms)	
Claim History			
Any motor accidents, claims or losses in the past 3 years	: No		
No. of claim(s)	: 0	Total Claim Amount	:
Cover Required			
Type	: Comprehensive		
Non-Authorised Workshop	: Yes	Sun / Moon Roof	: Yes
Solar Film	: Yes	NCD Protector	: Yes
Period of Insurance			
From	: 11/10/2017	To	: 10/10/2018
Premium Summary			
Annual Premium Payable for the Period			S\$1,084.51
Excess :	Named Driver	S\$800	
	Unnamed Driver	S\$1,300	

2.1.11 User can retrieve the quotations in the Quotation Report under the Agent Sales Report panel.



2.1.12 Quotation report will list all quotation that are not yet converted to new purchase sale. User can filter the transaction date by entering the Start and End Date. User can also search the Vehicle No, if necessary.

Quotation Report

Start Date: 11/10/2017 End Date: 12/10/2017 Vehicle No: Filter

Copy PDF Excel CSV Print Column visibility Search

Quotation Number	Agent Code	Agent Name	User Name	Product Name	Vehicle Number	Total Premium	Date	
								<div>CONVERT</div>

	Column Name	Column Description
1	Quotation Number	Auto-generated
2	Agent Code	This will display the agent's agent number who generated the quotation
3	Agent Name	This will display the agent's name who generated the quotation
4	User Name	This will display the user email address who generated the quotation
5	Product Name	This will display the product name
6	Vehicle Number	This will display the entered vehicle number
7	Total Premium	This will display the premium at the 'Add-Ons' screen
8	Date	This will display the transaction date

2.1.13 In the report, click on the 'Convert' button to proceed with new purchase. It will launch the 'Quote Us' page with the original entries. At the Ad-Ons page, click on Next button to continue.

- 2.1.14 Fill out Insured's Details and additional information required for product selected. Note that the Insured Name and Vehicle Number will be auto-populated based on the quotation entry. Once all fields are filled out, click on Next button

The Insured's Details

Personal Information

Name
JASMINE TAN

Eligibility
Singaporean

NRIC/FIN No.
S1472074Z

Contact Details

Email
jasminetan@yahoo.com

Mobile Phone
97653283

Mailing Address

Unit No.
#01-01

Postal Code
S36415

Block No.
435

Street Name
Lorong Ong Lye

Building Name

Vehicle Information

Engine No.
D4FA270F031690

Chassis No.
PL1BT2LCR7G029791

Vehicle No.
SJB89625

Has Purchase ☒ Yes ☐ No

Back To Quote
Next

- 2.1.15 Review the details in Summary Page, Select communication channel for Marketing and Click Submit button

Summary

Plan Selection

Cover Package: **Comprehensive**
 Start Date: **24/07/2017**
 End Date: **23/07/2018**
 NCD Entitlement: **0%**
 My Workshop: **Yes**
 Excess: **\$800**
 Premium Payable: **\$1,624.69**
 Promotional Discount: **0%**

Main Insured's Details

Name: **JASMINE TAN**
 Eligibility: **Singaporean**
 NRIC/FIN No.: **S1472074Z**
 Date of Birth: **24/07/1977**
 Gender: **Male**
 Marital Status: **Married**
 Occupation Nature: **Manager / Professional**
 Year(s) of Driving Experience:
 Demerit Point: **Demerit Points Free**

Communications

I wish to receive information, including marketing materials from Etiqa Insurance, from the following communication channels. By clicking yes, I accept and agree with [Terms and Conditions](#) for the Declarations and Undertaking.

☒ Yes ☐ No

If yes, please select mode of communication channel:

☒ Phone Call

☒ Direct Mail

☒ SMS/MMS

☒ Email

Back
Submit

- 2.1.16 Select credit card payment and Click Proceed to Payment button
The selected payment method will be displayed in the report

Payment Summary

Grand Total : \$1624.69

Product Name	Cover Package	Year of Registration	Cover Start Date	Cover End Date
Private Car Insurance	Comprehensive	2015	24/07/2017	23/07/2018

Insured Person	NRIC/FIN No.	Date of Birth
JASMINE TAN	S1472074Z	24/07/1977

SUB TOTAL : \$1624.69

Payment method

☐ Credit Card ☒ Cash / Cheque

Proceed To Payment

- 2.1.17 Supply the card information and Click Pay Now button
The payment gateway will be requiring an OTP to proceed



Payment Information

Merchant Name
Etiqa Insurance Pte Ltd

Order ID
636365158514274731_9

Merchant Reference
1865

Amount
SGD 1624.69

Payment Details

Name on Card
Jasmine Tan *

Card number
4111 - 1111 - 1111 - 1111 *

Expiry Date
Month Dec ▼ Year 2019 ▼ *

Card Security Code
... *

3 digits on the back of your cards

* Required

Cancel

Pay Now



2.1.18 Upon successful payment, the page below will be displayed

Payment Successful

Thank you for your continuous support of Etiqa Insurance, a copy of the Certificate of the Insurance has been forwarded your client's email address. You can also retrieve it under the "Reports" section.

Payment Summary

Policy No.	MD000084
Order ID	1865
Payment Amount	\$1,024.60
Payment Status	Paid

For any enquiries, please contact:
Email: customer.service@etiqa.com.sg | Hotline: +65 6887 5777
Customer Care Operating Hours: Mondays to Fridays, 8.30am to 5.30pm, excluding Saturdays, Sundays and Public Holidays.

[Back To Home](#)

2.1.19 Email on payment confirmation will send to the entered Insured's email address

2.1.20 Email confirmation on the new purchase with the Certificate of Insurance will send to the entered Insured's email address

2.1.21 SMS confirmation on the new purchase will send to the entered Insured's hand phone number

2.2 Generation of Application Reports

2.2.1. Select the Product from the Reports dropdown list

The screenshot shows the Etiqa Insurance website interface. At the top, the Etiqa Insurance logo is on the left, and navigation links for Product List, Reports, Cover Note, and Test Agent are on the right. The main content area is titled "Product List" and features three product cards: "ePROTECT cyclist" with a cyclist image, "Private Car Insurance" with a car image, and "ePROTECT safety" with a hands image. A dropdown menu is open over the "Reports" link, showing a list of products: eProtect-cyclist, Private Motor, eProtect safety, and eProtect travel. The footer contains the URL "2021161318/online/Agent/ProductList.pdf" and the Maybank logo.

2.2.2. List of submitted completed applications will be displayed

ePROTECT *safety*

Start Date:

End Date:

01/07/2017

24/07/2017

Filter

Copy

PDF

Excel

CSV

Print

Column visibility

Search:

Proposal Status	Paid_Date	Policy_No.	Proposal No.	Order Id	Period	Premium	Net Premium	Plan Type	Coverage	Start Date	End Date
Inforced	24/7/2017 1:50:32 PM	PA000149	PCE1707000007	1850	12-month	320.00	320.00	GOLD	Individual	24/07/2017	24/07/2017
Inforced	24/7/2017 1:45:25 PM	PA000148	PCE1707000005	1859	12-month	150.00	150.00	SILVER	Individual	24/07/2017	24/07/2017
Inforced	21/7/2017 6:30:07 PM	PA000147	PCE1707000006	1852	12-month	150.00	150.00	SILVER	Individual	21/07/2017	21/07/2017

The payment method will be displayed in the report

2.2.3 Available Options

- Filter listing based on Start Date of Coverage
- Search record
- Download listing
- Generate Policy Schedule by Clicking the Proposal No.

end-