

GTOM System training

Module 1: New Business

AXA Asia – General Insurance

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redefining / insurance



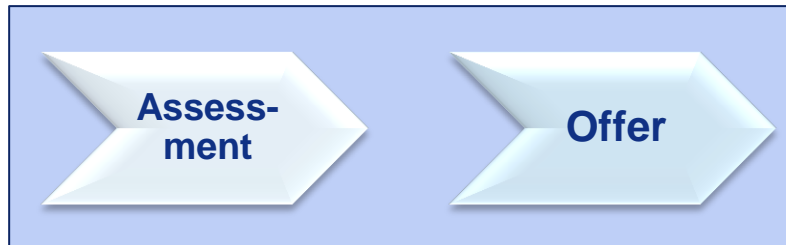
Content Page



- New Business Overview
- New Business STP
- New Business Non- STP

New Business – Overview

Quotation



- Car Details
- Driver Details
- Claim History
- Product Selection

- Product Selection
- Packs
- Add-Ons



- Additional Car Details
- Additional Driver Details
- Proposal
- Correspondence



- External Payment Gateway
- Policy Details
- Policy Issuance
- Email Confirmation

Login



redefining / insurance

AXA GTOM

Welcome to our new agent portal.

Access

Login

Password

SIGN IN

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Homepage

The screenshot shows the AXA GTOM User Training Guide – New Business homepage. The header features the AXA logo with the tagline "redefining / standards". On the right, it displays the user's name "Jenny Goh Organisation", email "Eliza Hay Ee Un", and a "Sign Out" link next to a profile picture. Below the header is a navigation bar with tabs for "PRODUCTS", "MANAGE", "CLAIMS", "REPORTS", and a "SEARCH" button with a magnifying glass icon. The main content area is titled "AXA Product Offers" and includes a sub-header "Personal". Under "Personal", there are four categories: "Accident", "Home", "Motor", and "Travel". Each category has a list of options: "New Business", "Renewal", and "Endorsement". The "Home" category's "New Business" option is highlighted with a dark background. Below the "Personal" section is a "Business" section with two categories: "Smart Plan" and "Business Advantage", each followed by a list of options represented by dashed lines.

AXA redefining / standards

Jenny Goh Organisation
Eliza Hay Ee Un
[Sign Out](#)

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

AXA Product Offers

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

Personal

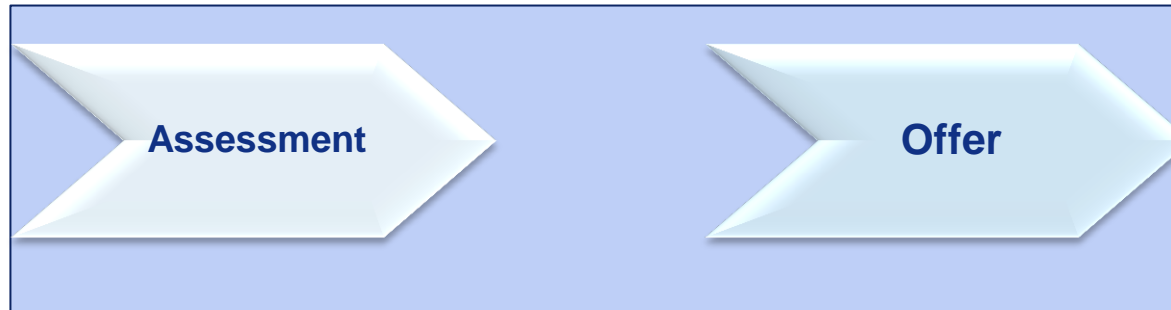
Accident	Home	Motor	Travel
New Business	New Business	New Business	New Business
Renewal	Renewal	Renewal	Renewal
Endorsement	Endorsement	Endorsement	Endorsement

Business

Smart Plan	Business Advantage
-----	-----
-----	-----
-----	-----
-----	-----

New Business STP – Quotation

Quotation



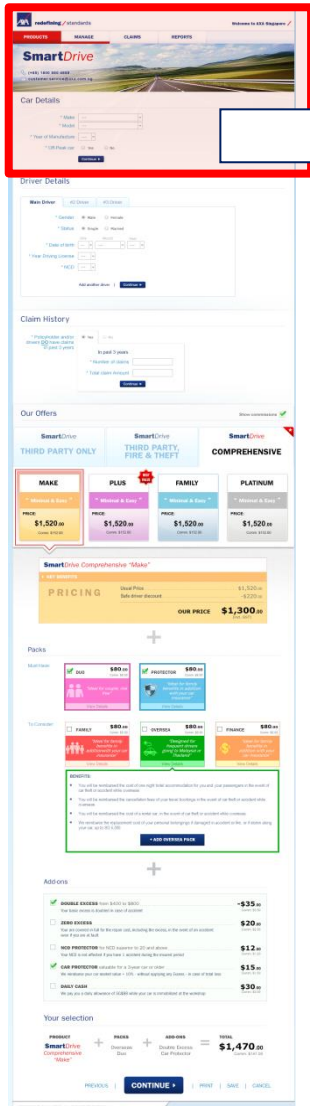
- Car Details
- Driver Details
- Claim History

- Product Selection
- Packs
- Add-Ons

Products Screen – Get Started



Smart Drive – Account & Car Details



The main account page displays the following information:

- Header:** AXA redefining / insurance logo, Jenny Goh Organisation, Eliza Hay Ee Lin, and a Sign Out button.
- Navigation:** PRODUCTS, MANAGE, CLAIMS, REPORTS.
- SmartDrive Banner:** (+65) 1800 880 4888, customer.service@axa.com.sg.
- Account Details:** * Account code XXXXX.
- Car Details:**
 - * Make: [Dropdown]
 - * Model: [Dropdown]
 - * Year of manufacture: [Dropdown]
 - * Off-peak car: ☐ Yes ☒ No
 - Continue** button

Smart Drive – Driver Details

The screenshot shows the Smart Drive website interface. The 'Driver Details' section is highlighted with a red box, and a white arrow points from it to the main 'Driver Details' form on the right. The website header includes 'AXA redefining / insurance' and navigation links for 'PRODUCTS', 'CLAIMS', and 'REPORTS'. The 'SmartDrive' logo is prominently displayed. Below the logo, there are sections for 'Car Details', 'Driver Details', 'Claim History', and 'Our Offers'. The 'Driver Details' section is the focus, showing fields for 'Main Driver', '#2 Driver', and '#3 Driver'. The 'Main Driver' section includes fields for 'Gender' (Male/Female), 'Status' (Single, Divorced or Widowed/Married), 'Date of birth' (Day, Month, Year), 'How many years have you held a licence?' (dropdown), 'NCD' (30), and 'Postal code'. A green checkmark indicates 'I can produce a Certificate Of Merit and get 10% discount'. The 'Our Offers' section shows four plans: 'MAKE' (\$1,520), 'PLUS' (\$1,520), 'FAMILY' (\$1,520), and 'PLATINUM' (\$1,520). The 'SmartDrive Comprehensive "Make"' plan is highlighted, showing a price of \$1,300. The 'Packs' section shows 'Basic' (\$80) and 'Premium' (\$80) options. The 'Add-ons' section shows 'Driver Excess' (\$35), 'NCD Protection' (\$12), 'Car Protection' (\$15), and 'Daily Care' (\$30). The 'Your selection' section shows the total price of \$1,470.

Driver Details

Main Driver

#2 Driver

#3 Driver

* Gender ☒ Male ☐ Female

* Status ☒ Single, Divorced or Widowed ☐ Married

* Date of birth

Day: --, Month: ---, Year: ---

* How many years have you held a licence?

* NCD 30

☒ I can produce a Certificate Of Merit and get 10% discount

* Postal code

Add another driver |

Continue ▶

Smart Drive – Claim History & Policy Dates

AXA redefining / insurance

SmartDrive

Car Details

Driver Details

Claim History

Our Offers

THIRD PARTY ONLY THIRD PARTY FIRE & THEFT COMPREHENSIVE

MAKE PLUS FAMILY PLATINUM

SmartDrive Comprehensive "Make"

PRICING

Packs

Actions

Your selection

PREVIOUS CONTINUE PRINT SAVE CANCEL

Claim History

* Any claims in past 3 years for Policyholder and/or driver

☒ Yes ☐ No

* Number of accidents/claims (excl. windscreen)?

* Number of windscreen claims?

* Total claim amount

Continue

Policy Dates

Start Day Month Year End Day Month Year

Continue

Smart drive – Our Offers: Plans

The screenshot shows the SmartDrive website interface. The 'Our Offers' section is highlighted with a red box. It displays four plans: MAKE, PLUS, FAMILY, and PLATINUM. The 'SmartDrive Comprehensive' plan is highlighted with a red box, and a blue arrow points from it to the right.

Our Offers

Show commissions ☐

SmartDrive
THIRD PARTY ONLY

SmartDrive
THIRD PARTY, FIRE & THEFT

SmartDrive
COMPREHENSIVE

FLEXI
 "Value & Flexibility"
PRICE:
\$1,746.00

FLEXI+
 "Flexibility & Savings"
PRICE:
\$1,795.00

FLEXI FAMILY
 "Complete Family Protection"
PRICE:
\$1,880.00

ESSENTIAL+
 "Value & Savings"
PRICE:
\$2,300.00

SmartDrive Comprehensive "Flexi"
KEY BENEFITS

- Towing & Transportation in Singapore or Overseas
- Survey and Repairs Authorization within 24 hours
- Personal Accident \$30,000
- Repairs guaranteed for 12 months
- Flood Protection
- Delivery repaired car
- Personal belongings \$3,000

Usual Price	\$2,955.00
5% DISCOUNT: Early Bird	\$2,807.25
25% DISCOUNT: New Vehicle	\$2,068.50
10% DISCOUNT: Super Sales*	\$1,773.00

*Gross with applicable GST and Add-on

OUR PRICE
\$1,773.00
 (incl. GST)

Smart Drive – Our Offers: Packs

The screenshot shows the Smart Drive website interface. At the top, there's a navigation bar with 'HOME', 'ABOUT', 'CONTACT', and 'LOG IN'. Below this, the 'Smart Drive' logo is prominent. The main content area is divided into sections: 'Car Details', 'Driver Details', 'Claim History', and 'Our Offers'. The 'Our Offers' section features a table with four columns: 'MAKE', 'PLUS', 'FAMILY', and 'PLATINUM'. Each column lists the price and the 'OUR PRICE'. Below this, there's a 'PRICING' section with a table showing the 'OUR PRICE' for different packages. A red box highlights the 'Packs' section, which is a detailed view of the insurance packs. A large white arrow points from this section to the right, towards the 'Packs' section of the main image.

Package	Price	Our Price
MAKE	\$1,520.00	\$1,300.00
PLUS	\$1,520.00	\$1,300.00
FAMILY	\$1,520.00	\$1,300.00
PLATINUM	\$1,520.00	\$1,300.00

Packs

Show commissions ☐

The 'Packs' section displays five insurance options, each with a 'MUST HAVE' badge and a 'CHECK' icon. The packs are: Duo Protector, Claim Protector, Family Protector, Overseas Protector, and Protector Plus. Each pack has a description, an icon, and a price of \$175.00 (U.P. \$100.00).

Pack Name	Description	Price
DUO PROTECTOR	"Designed for you and your partner."	\$175.00 (U.P. \$100.00)
CLAIM PROTECTOR	"Pay no excess and enjoy NCD even with a claim."	\$175.00 (U.P. \$100.00)
FAMILY PROTECTOR	"Keep your family covered on the road."	\$175.00 (U.P. \$100.00)
OVERSEAS PROTECTOR	"Ideal for roadtrips to Malaysia and Thailand."	\$175.00 (U.P. \$100.00)
PROTECTOR PLUS	"Cash in on added savings, no strings attached."	\$175.00 (U.P. \$100.00)

BENEFITS:

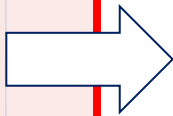
- ✓ We pay an immediate cash relief of \$200 in the event of a car accident overseas.
- ✓ We reimburse 1 night hotel accommodation up to a maximum of \$300.
- ✓ We reimburse the holiday cancellation fee in the event of overseas car theft or accident up to \$2,500.
- ✓ We arrange for a rental car and reimburse the rental costs up to 8 days.
- ✓ Replacement cost of your personal belongings stolen or damaged following an accident/fire up to \$5,000 while overseas.

CLOSE

Smart Drive – Our Offers: Add-Ons

The screenshot shows the 'Our Offers' section of the SmartDrive website. It features four main packages: MAKE, PLUS, FAMILY, and PLATINUM, each with a price and a 'View Details' link. Below these, there's a 'SmartDrive Comprehensive "Make"' package with a price of \$1,300.00. The 'Packs' section shows three options: FAMILY, COMPREHENSIVE, and PLATINUM, each with a price and a 'View Details' link. The 'Add-ons' section shows three options: DOUBLE EXCESS, EXCESS, and NCD PROTECTOR, each with a price and a 'View Details' link.

This is a zoomed-in view of the 'Add-ons' section from the previous screenshot. It shows three add-on options: DOUBLE EXCESS for \$35.00, EXCESS for \$20.00, and NCD PROTECTOR for \$12.00. Each option has a brief description and a 'View Details' link. Below the add-ons, there's a 'Your selection' section showing the total price of \$1,470.00, including the SmartDrive Comprehensive Make package, the Double Excess pack, and the Double Excess Car Protector add-on.



The screenshot shows the 'Your selection' section of the SmartDrive website. It displays the final selection of products, packs, add-ons, and discounts, leading to a total price of \$1,988.00 (incl. GST). The selection includes the SmartDrive Comprehensive "Flexi" product, Duo Protector and Claim Protector packs, Double Excess Car Protector add-on, and Early Bird New Vehicle Super Sales discount. A large blue 'CONTINUE' button is prominently displayed, along with 'PREVIOUS', 'SAVE', 'REFER', and 'CANCEL' links.

PRODUCT	PACKS	ADD-ONS	DISCOUNTS	TOTAL
SmartDrive Comprehensive "Flexi"	Duo Protector Claim Protector	Double Excess Car Protector	Early Bird New Vehicle Super Sales	\$1,988.00 (incl. GST)

Offer – Show Commissions

Our Offers

Show commissions

SmartDrive THIRD PARTY ONLY	SmartDrive THIRD PARTY, FIRE & THEFT	SmartDrive COMPREHENSIVE	
<div>FLEXI “ Value & Flexibility ” PRICE: \$1,746.00 Comm. \$18.00</div>	<div>FLEXI+ “ Flexibility & Savings ” PRICE: \$1,795.00 Comm. \$18.00</div>	<div>FLEXI FAMILY “ Complete Family Protection ” PRICE: \$1,880.00 Comm. \$18.00</div>	<div>ESSENTIAL+ “ Value & Savings ” PRICE: \$2,300.00 Comm. \$18.00</div>

SmartDrive Comprehensive “Flexi”

▼ KEY BENEFITS

- ✓ Towing & Transportation in Singapore or Overseas
- ✓ Survey and Repairs Authorization within 24 hours
- ✓ Personal Accident \$30,000
- ✓ Repairs guaranteed for 12 months
- ✓ Flood Protection
- ✓ Delivery repaired car
- ✓ Personal belongings \$3,000

Offer – Show Commissions

Usual Price	\$2,955.00
✓ 5% DISCOUNT: Early Bird	\$2,807.25
✓ 25% DISCOUNT: New Vehicle	\$2,068.50
✓ 10% DISCOUNT: Super Sales*	\$1,773.00

*Discount also applicable on Packs and Add-ons

OUR PRICE
\$1,773.00
(incl. GST)

+

Packs

Show commissions ☒

MUST HAVE

☒ **DUO PROTECTOR**

"Designed for you and your partner."



\$175.00
U.P. \$180.00
Comm. \$18.00

MUST HAVE

☒ **CLAIM PROTECTOR**

"Pay no excess and enjoy NCD even with a claim."



\$175.00
U.P. \$180.00
Comm. \$18.00

☐ **FAMILY PROTECTOR**

"Keep your family covered on the road."



\$175.00
U.P. \$180.00
Comm. \$18.00

☐ **OVERSEAS PROTECTOR**

"Ideal for roadtrips to Malaysia and Thailand."



\$175.00
U.P. \$180.00
Comm. \$18.00

☐ **PROTECTOR PLUS**

"Cash in on added savings, no strings attached."



\$175.00
U.P. \$180.00
Comm. \$18.00

BENEFITS:

- ✓ We pay an immediate cash relief of \$200 in the event of a car accident overseas.
- ✓ We reimburse 1 night hotel accommodation up to a maximum of \$300.
- ✓ We reimburse the holiday cancellation fee in the event of overseas car theft or accident up to \$2,500.
- ✓ We arrange for a rental car and reimburse the rental costs up to 8 days.
- ✓ Replacement cost of your personal belongings stolen or damaged following an accident/fire up to \$6,000 while overseas.

CLOSE

Offer – Show Commissions

Add-ons



Show commissions ☒

- | | | |
|-------------------------------------|---|---|
| <input type="checkbox"/> | NCD PROTECTOR for NCD superior to 20 and above
Your NCD is not affected if you have 1 accident during the insured period | \$12.00
(U.P. \$15.00)
Comm. \$18.00 |
| <input checked="" type="checkbox"/> | EXCESS Double: \$800
Your basic excess is doubled in case of accident | -\$50.00 |
| <input checked="" type="checkbox"/> | PERSONAL ACCIDENT Sum Insured: \$200,000
Personal accident & medical expenses | \$100.00
(U.P. \$110.00)
Comm. \$11.00 |
| <input type="checkbox"/> | COURTESY CAR
A Courtesy Car will be delivered to your preferred location and loan to you for a duration of 8 or 10 days maximum when your vehicle under repair following an accident. | \$15.00
(U.P. \$18.00)
Comm. \$1.50 |
| <input type="checkbox"/> | DAILY CASH
We pay you a daily allowance of SG\$88 while your car is immobilized at the workshop | \$30.00
(U.P. \$35.00)
Comm. \$3.50 |

Offer – Show Commissions

Your selection

PRODUCT		PACKS		ADD-ONS		DISCOUNTS		TOTAL
SmartDrive Comprehensive "Flexi"	+	Duo Protector Claim Protector	+	Double Excess Car Protector	–	Early Bird New Vehicle Super Sales	=	\$1,988.00 (incl. GST) Comm. \$198.80

PRICE ADJUSTMENT

Commissions are calculated on pre-GST premiums and exclude GST on the commission itself

AUTHORITY DISCOUNT

☒ \$ ☐ %

max
\$20,000

COMMISSION RATE

☐ \$ ☒ %

15% 0%

☐ Applicable at renewal

PREVIOUS |

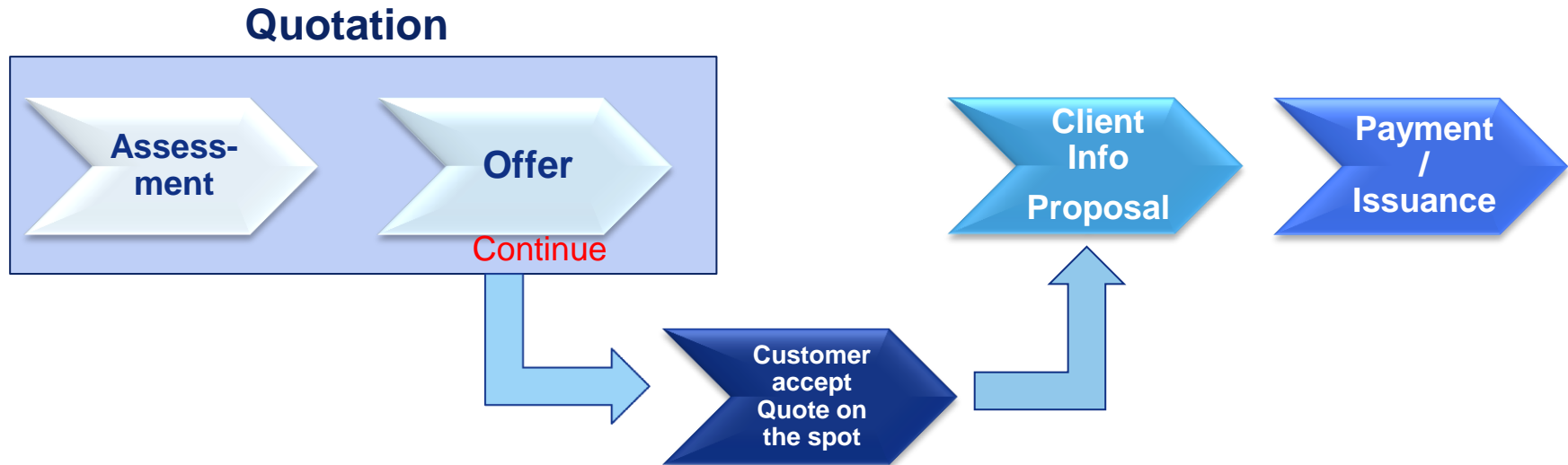
CONTINUE ▶

| SAVE

| REFER

| CANCEL

New Business - Quotation to Acceptance with Issuance (STP)



New Business STP – Proposal & Payment



Client Info Proposal

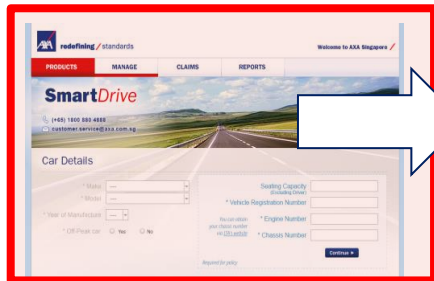
- Additional Car Details
- Additional Driver Details
- Proposal
- Correspondence



Payment/ Issuance

- External Payment Gateway
- Policy Details
- Policy Issuance
- Email Confirmation

Additional Details – Car Details



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Jenny Goh Organisation
Eliza Hay Ee Lin
[Sign Out](#)

PRODUCTSMANAGECLAIMSREPORTS

(+65) 1800 880 4888
customer.service@axa.com.sg

Car Details

* Make

* Model

* Year of manufacture

* Off-peak car

☐ Yes
☒ No

Seating capacity (excluding driver)

Vehicle registration number

You can obtain your chassis number via [ITA's website](#)

* Engine number

* Chassis number

Sub model

Cubic capacity

Continue

Required for policy

PROPOSAL
Valid up to 11 Feb 2013

Policy Dates
Start: 04 Feb 2013
End: 03 Feb 2014

SmartDrive: Comprehensive "Make"
\$1,520.00

Discounts: Safe driver
-\$20.00

Fees:

Overseas
\$80.00

Duo
\$110.00

Options:

Double Excess
\$35.00

Car Protector
\$15.00

Total:
\$1,470.00

PAYMENT

☒ Please check the box to confirm that you have read and agreed with the policy terms, conditions and exclusions.

* Credit Card Type

* Credit Card Number

* Verification Code

* Card Holder Name

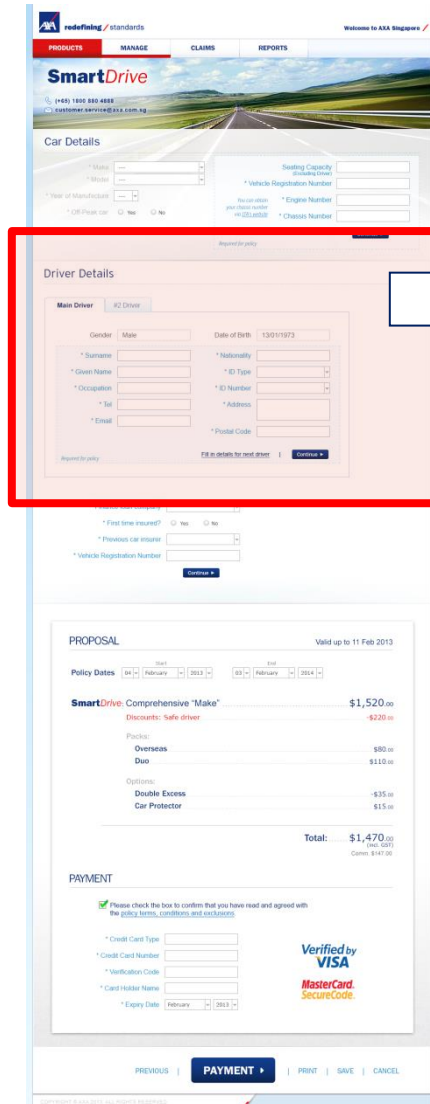
* Expiry Date

February 2013

Verified by VISA MasterCard SecureCode

PREVIOUS
PAYMENT
PRINT
SAVE
CANCEL

Additional Details – Driver Details



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PRODUCTS MANAGE CLAIMS REPORTS

Welcome to AXA Singapore

SmartDrive

(+65) 1000 800 4888
customer.service@axa.com.sg

Car Details

Make: Year: Model: Seating Capacity:
* Year of Manufacture: * Vehicle Registration Number:
* OR Peak car: ☐ Yes ☐ No * Engine Number:
* OR Peak car: ☐ Yes ☐ No * Chassis Number:

Driver Details

Main Driver #2 Driver

Gender: Male Date of Birth: 13/01/1973

* Surname: * Nationality:
* Given Name: * ID Type:
* Occupation: * ID Number:
* Tel: * Address:
* Email: * Postal Code:

Agreed to policy Fill in details for next driver Continue

* First time insured? ☐ Yes ☐ No
* Provides car insurer:
* Vehicle Registration Number:

Continue

PROPOSAL Valid up to 11 Feb 2013

Policy Dates: Start: 01 February 2013 End: 31 February 2014

SmartDrive: Comprehensive "Make" \$1,520.00
Discounts: Safe driver -\$220.00

Packs:
Overseas \$80.00
Duo \$110.00

Options:
Double Excess -\$35.00
Car Protector \$15.00

Total: \$1,470.00 (incl. GST)
Comm. \$147.00

PAYMENT

☒ Please check the box to confirm that you have read and agreed with the policy terms, conditions and exclusions

* Credit Card Type:
* Credit Card Number:
* Verification Code:
* Card Holder Name:
* Expiry Date: February 2013

Verified by VISA MasterCard SecureCode

PREVIOUS PAYMENT PRINT SAVE CANCEL

Driver Details

Main Driver #2 Driver

Gender: Male Date of birth: 13/01/1973

* Surname: * Phone:
* Given name: * Email:
Display name as: Surname * Given name * Nationality: SINGAPORE
* Occupation: * FIN / NRIC:

Required for policy

Next Driver

* Main driver is also the policyholder: ☒ Yes ☐ No

Postal code: 012345

* Address:

Additional Details – Policy Holder

Car Details

Make: Year: Model: Seating Capacity: Vehicle Registration Number: Engine Number: Chassis Number:

Driver Details

Main Driver: ☐ #2 Driver: ☐

Gender: Date of Birth:

* Surname: * Nationality: * Given Name: * ID Type: * Occupation: * ID Number: * Tel: * Address: * Email: * Postal Code:

* Insurance from company: * First time insured? ☐ Yes ☐ No * Previous car insurer: * Vehicle Registration Number:

PROPOSAL

Valid up to 11 Feb 2013

Policy Dates: to

SmartDrive: Comprehensive "Make" \$1,520.00
Discounts: Safe driver -\$220.00

Packs:
Overseas \$80.00
Duo \$110.00

Options:
Double Excess -\$35.00
Car Protector \$15.00

Total: \$1,470.00 (incl. GST)
Gross: \$147.00

PAYMENT

☒ Please check the box to confirm that you have read and agreed with the policy terms, conditions and exclusions.

* Credit Card Type: * Credit Card Number: * Verification Code: * Card Holder Name: * Expiry Date:

Verified by VISA MasterCard SecureCode

PREVIOUS | **PAYMENT** | PRINT | SAVE | CANCEL

* Main driver is also the policyholder

☐ Yes

☐ No

* Type ☐ Individual ☒ Corporate

* Company name

* Country

* Registration Number

* Postal Code

* Phone

* Address

* Email

Required for policy

Additional Details – Financial Loan & Proposal Summary

redefining / standards

PRODUCTS MANAGE CLAIMS REPORTS

Welcome to AXA Singapore

SmartDrive

(+65) 1800 880 4888
customer.service@axa.com.sg

Car Details

Make:
Model:
Year of Manufacture:
OR Peak car: ☐ Yes ☐ No

Seating Capacity:
Vehicle Registration Number:
Engine Number:
Chassis Number:
Do not enter your motor number (V20, L20, etc.)

Required to policy

Driver Details

Main Driver: #2 Driver:

Gender: Male Date of Birth: 13/01/1973

* Surname: * Nationality:
* Given Name: * ID Type:
* Occupation: * ID Number:
* Tel: * Address:
* Email: * Postal Code:

Required to policy

Fill in details for next driver

Continue

* Financial loan company:
* First time insured? ☐ Yes ☐ No
* Provides car insurer:
* Vehicle Registration Number:

Continue

PROPOSAL

Valid up to 11 Feb 2013

Policy Dates: Start: 04 February 2013 / End: 03 February 2014

SmartDrive: Comprehensive "Make" \$1,520.00
Discounts: Safe driver -\$220.00

Packs:
Overseas \$80.00
Duo \$110.00

Options:
Double Excess -\$35.00
Car Protector \$15.00

Total: \$1,470.00 (incl. GST)
Comp. \$147.00

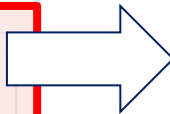
PAYMENT

☒ Please check the box to confirm that you have read and agreed with the policy terms, conditions and exclusions

* Credit Card Type:
* Credit Card Number:
* Verification Code:
* Card Holder Name:
* Expiry Date: February 2013 / 2013

Verified by VISA MasterCard SecureCode

PREVIOUS | PAYMENT | PRINT | SAVE | CANCEL



PROPOSAL

Valid up to 18 Aug 2013

Policy dates: Start: 04 September 2013 / End: 03 September 2014

SmartDrive: Comprehensive "Flexi" \$1,520.00
Discounts: Safe driver -\$220.00

Packs:
Overseas \$80.00
Duo \$110.00

Options:
Double Excess -\$35.00
Car Protector \$15.00

Total: \$1,470.00 (incl. GST)
Comp. \$147.00

< View PDF >

Payment – Credit Card

CORRESPONDANCE

Send by email all policy documents to:

PAYMENT

☒ Please check the box to confirm that you have read and agreed with the [policy terms, conditions and exclusions](#) as well as [AXA Privacy Promise](#).

CREDIT CARD

PAY BY CREDITS

* Payment Mode

☐ Full

☒ Instalment Payment Premium (IPP)

* Issuing Bank

PREVIOUS

PAYMENT ▶

SAVE

CANCEL

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The screenshot shows the AXA SmartDrive website interface. At the top, there's a navigation bar with 'PRODUCTS', 'MANAGE', 'CLAIMS', and 'REPORTS'. Below this is a 'SmartDrive' banner with contact information. The main content area is divided into 'Car Details' and 'Driver Details' sections. The 'Car Details' section includes fields for make, model, year, seating capacity, vehicle registration number, engine number, and chassis number. The 'Driver Details' section includes fields for gender, date of birth, surname, given name, nationality, ID type, ID number, address, email, and postal code. Below these are sections for 'Financed from company', 'First time insured?', 'Previous Car Insurer', and 'Vehicle Registration Number'. A 'PROPOSAL' section shows policy dates and a table of costs: SmartDrive Comprehensive 'Make' (\$1,520.00), Discounts: Safe driver (-\$220.00), Packs: Overseas (\$90.00), Duo (\$110.00), Options: Double Excess (-\$35.00), and Car Protector (\$15.00). At the bottom, a 'PAYMENT' section is highlighted with a red box. It contains a checkbox for policy terms, credit card details (type, number, verification code, holder name, expiry date), and a 'PAYMENT' button. An arrow points from this section to the 'PAYMENT' button in the main screenshot above.

Payment – Pay By Credits

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PRODUCTS MANAGE CLAIMS REPORTS

Welcome to AXA Singapore

SmartDrive

(+65) 1000 800 4888
customer.service@axa.com.sg

Car Details

* Make: [Dropdown]
* Model: [Dropdown]
* Year of Manufacture: [Dropdown]
* Off-Road car: ☐ Yes ☒ No

Seating Capacity: [Dropdown]
* Vehicle Registration Number: [Text]
* Engine Number: [Text]
* Chassis Number: [Text]

Report to policy

Driver Details

Main Driver: ☒ AD Driver

Gender: [Dropdown] Male Date of Birth: 13/01/1973

* Surname: [Text] * Nationality: [Dropdown]
* Given Name: [Text] * ID Type: [Dropdown]
* Occupation: [Text] * ID Number: [Text]
* Tel: [Text] * Address: [Text]
* Email: [Text] * Postal Code: [Text]

Report to policy

Fill in details for and driver: [Text] Continue

* Financed from company: [Dropdown]
* First time insured? ☐ Yes ☒ No
* Previous Car Insurer: [Dropdown]
* Vehicle Registration Number: [Text]

Continue

PROPOSAL Valid up to 11 Feb 2013

Policy Dates: Start: 01 February 2013 End: 01 February 2014

SmartDrive: Comprehensive "Make" \$1,520.00
Discounts: Safe driver -\$220.00

Packs:
Overseas \$80.00
Duo \$110.00

Options:
Double Excess -\$35.00
Car Protector \$15.00

PAYMENT

☒ Please check the box to confirm that you have read and agreed with the [policy terms, conditions and exclusions](#) as well as [AXA Privacy Promise](#).

CREDIT CARD PAY BY CREDITS

Current Balance: \$50,000.00

Balance after payment: \$48,530.00

PREVIOUS | PAYMENT ► | SAVE | CANCEL

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PAYMENT

☒ Please check the box to confirm that you have read and agreed with the [policy terms, conditions and exclusions](#).

* Credit Card Type: [Dropdown]
* Credit Card Number: [Text]
* Verification Code: [Text]
* Card Holder Name: [Text]
* Expiry Date: February 2013

Verified by VISA
MasterCard SecureCode

PREVIOUS | PAYMENT ► | PRINT | SAVE | CANCEL

Disclaimer

The screenshot shows a web interface for AXA's 'redefining / insurance' platform. At the top, there's a navigation bar with 'PRODUCTS' (highlighted in red), 'MANAGE', 'CLAIMS', and 'REPORTS'. To the right, it says 'Jonny Goh Organisation', 'Eliza Hay Ee Lin', and a 'Sign Out' link next to a user profile picture. Below the navigation bar, a blue banner reads 'DISCLAIMER (22/08/2013)'. The main content area is titled 'IMPORTANT' and contains a paragraph: 'Before we proceed with your SmartDrive Private Motor Insurance quotation request, please kindly confirm the following statements.' This is followed by a bulleted list of seven conditions. At the bottom, there are two buttons: 'PREVIOUS' and 'CONTINUE' (which is larger and blue with a right-pointing arrow). The footer of the page states 'COPYRIGHT © AXA 2013. ALL RIGHTS RESERVED.'

AXA redefining / insurance

Jonny Goh Organisation
Eliza Hay Ee Lin
[Sign Out](#)

PRODUCTS MANAGE CLAIMS REPORTS

DISCLAIMER (22/08/2013)

IMPORTANT

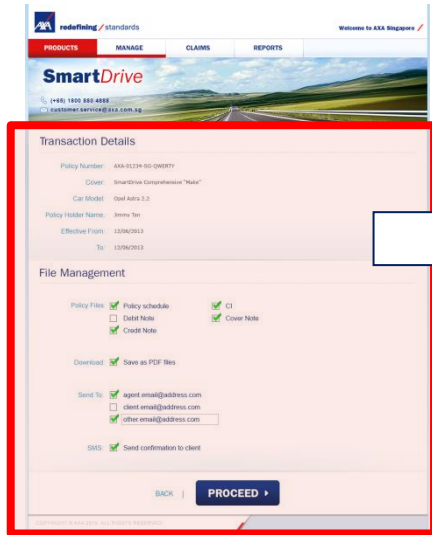
Before we proceed with your SmartDrive Private Motor Insurance quotation request, please kindly confirm the following statements.

- You are between the age of 21 and 70 and have more than 1 year of driving experience and do not suffer from any disease or infirmity that could impair the ability to drive
- You do not have an existing AXA motor policy on the car you are now seeking to insure and have not had any motor insurance terminated against your will.
- You have not had two or more claims / accidents in the past 3 years, or any one claim / accident for an amount of \$10,000 or more in the past 3 years.
- You have not been convicted of any driving offences or have not been given any demerit points for traffic offences in the past 3 years
- Your car has not been modified from the manufacturer's standard specifications
- Your car is used for private use only
- Your car is not a Honda or Chevrolet that is under 3 years old or a vehicle of high performance including, but not limited to, Ferrari or Lamborghini

PREVIOUS | CONTINUE ►

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Policy Confirmation



Transaction Details

Policy Number: AXA-11234-56-789012
Cover: SmartDrive Comprehensive "Mini"
Car Model: Opel Astra 3.0
Policy Holder Name: James Tan
Effective From: 12/06/2013
To: 12/06/2013

File Management

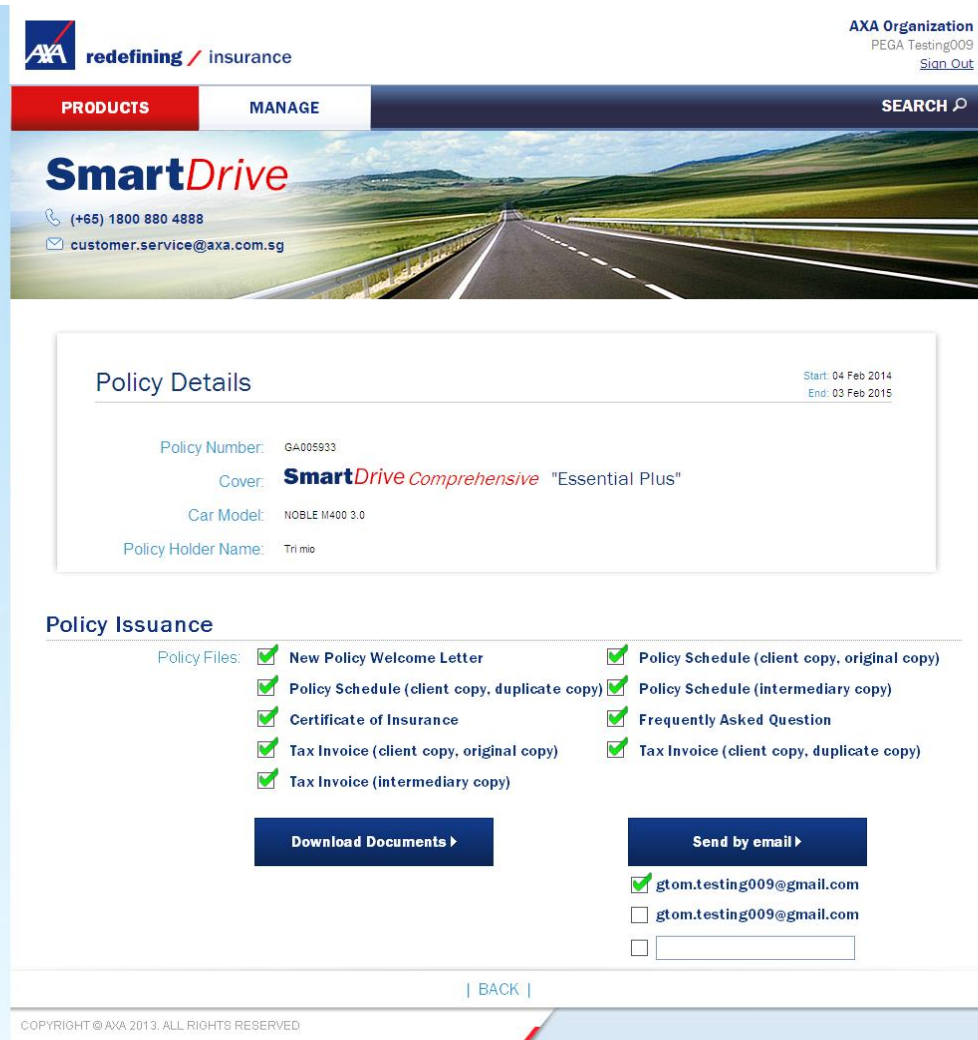
Policy Files: ☒ Policy schedule ☒ C1
☐ Data Note ☒ Cover Note
☒ Create Note

Download: ☒ Save as PDF files

Send to: ☒ agent_email@address.com
☐ client_email@address.com
☒ other_email@address.com

SMS: ☒ Send confirmation to client

[BACK](#) | [PROCEED](#)



AXA Organization
PEGA Testing009
[Sign Out](#)

PRODUCTS **MANAGE** **SEARCH**

SmartDrive
(+65) 1800 880 4888
customer.service@axa.com.sg

Policy Details Start: 04 Feb 2014 End: 03 Feb 2015

Policy Number: GA005933
Cover: **SmartDrive Comprehensive** "Essential Plus"
Car Model: NOBLE M400 3.0
Policy Holder Name: Tri mio

Policy Issuance

Policy Files: ☒ New Policy Welcome Letter ☒ Policy Schedule (client copy, original copy)
☒ Policy Schedule (client copy, duplicate copy) ☒ Policy Schedule (intermediary copy)
☒ Certificate of Insurance ☒ Frequently Asked Question
☒ Tax Invoice (client copy, original copy) ☒ Tax Invoice (client copy, duplicate copy)
☒ Tax Invoice (intermediary copy)

[Download Documents](#) [Send by email](#)

☒ gtom.testing009@gmail.com
☐ gtom.testing009@gmail.com
☐

[BACK](#)

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NB Output Documents

- **Saved quotes are sent to the client by email displaying the important details of the offer:**



Your AXA Quote

- **Upon successful policy issuance, the following documents are generated and sent by email to client and/or agent:**

- ✓ **Welcome letter**

- Covering letter stating the policy that has been issued and listing the documents making up the policy

- ✓ **Policy Schedule**

- Policyholder details, benefits and their limits apply, agreed premium and period of insurance

- ✓ **Certificate of Insurance**

- Proof of motor insurance cover for the car and drivers insured to drive the car

- ✓ **Frequently Asked Questions**

- Most commonly asked questions and answers

- ✓ **Tax Invoice**

- Invoice of premium amount payable for policy

- ✓ **Payment Confirmation Letter**

- Receipt of payment made by credit card



GTOM NB policy documents

New Business - Quotation to Acceptance with Issuance (Non –STP)



Save Your Quote

Save your quote

Client Details

* Main driver is also the policy holder ☐ Yes ☒ No

* Type ☐ Individual ☒ Corporate

* Company name

* Company registration number

Vehicle registration number

* Phone

* Send email to

→

SAVE ▶ | [BACK](#)

Save Your Quote

Save your quote

Client Details

* Main driver is also the policy holder

☒ Yes

☐ No

* Type

☒ Individual

☐ Corporate

* Surname

* Given name

Display name as

Surname + Given name



* FIN / NRIC

Vehicle registration number

* Phone

* Send email to

Client



Enter email address

SAVE ►

| [BACK](#)

Save Your Quote

Your quote is now saved
(ref: AXA-MTR-SG-2013-123456789)

[PDF](#)

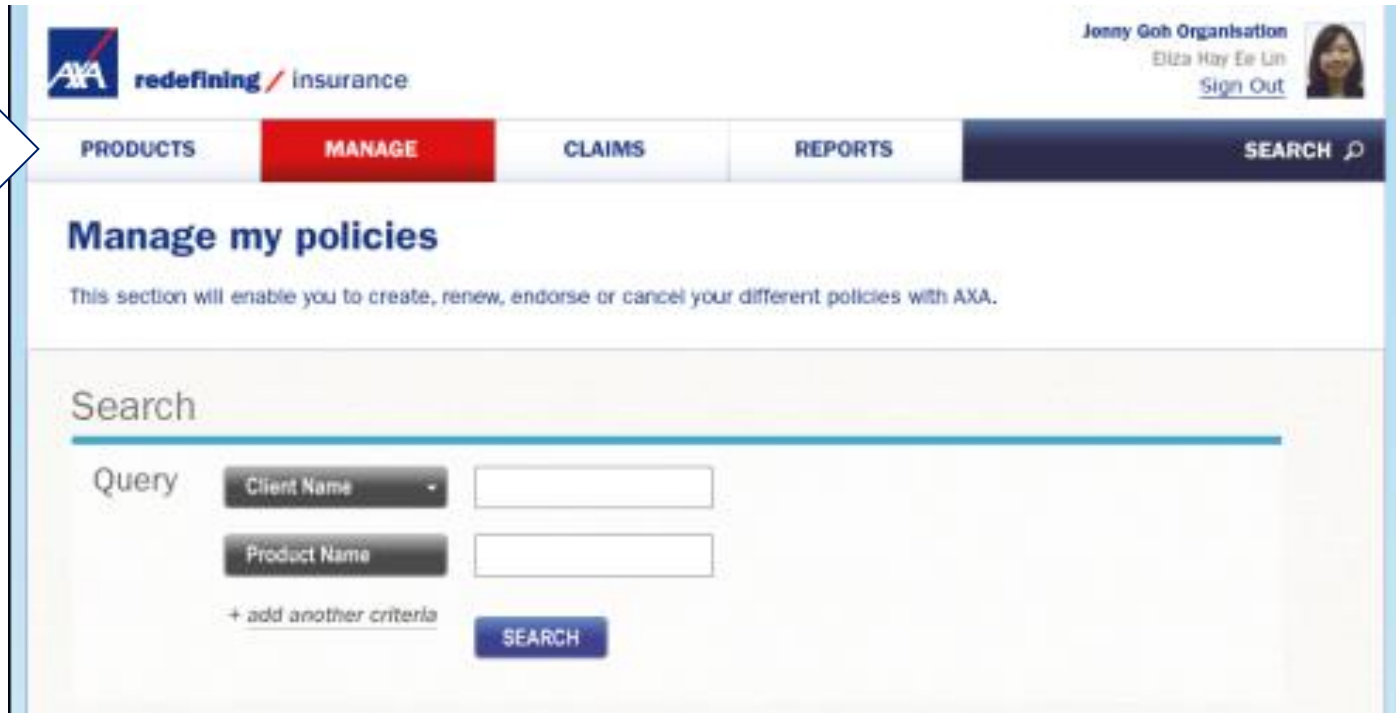
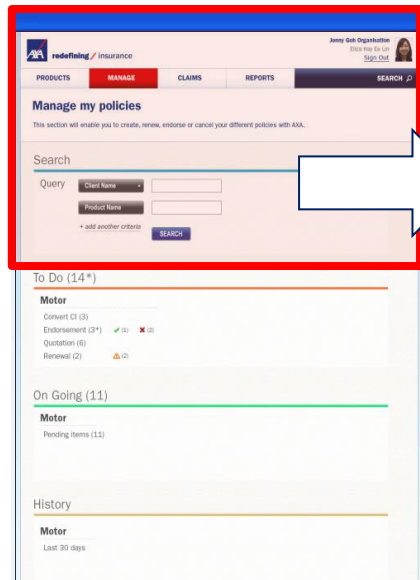


CONTINUE ▶

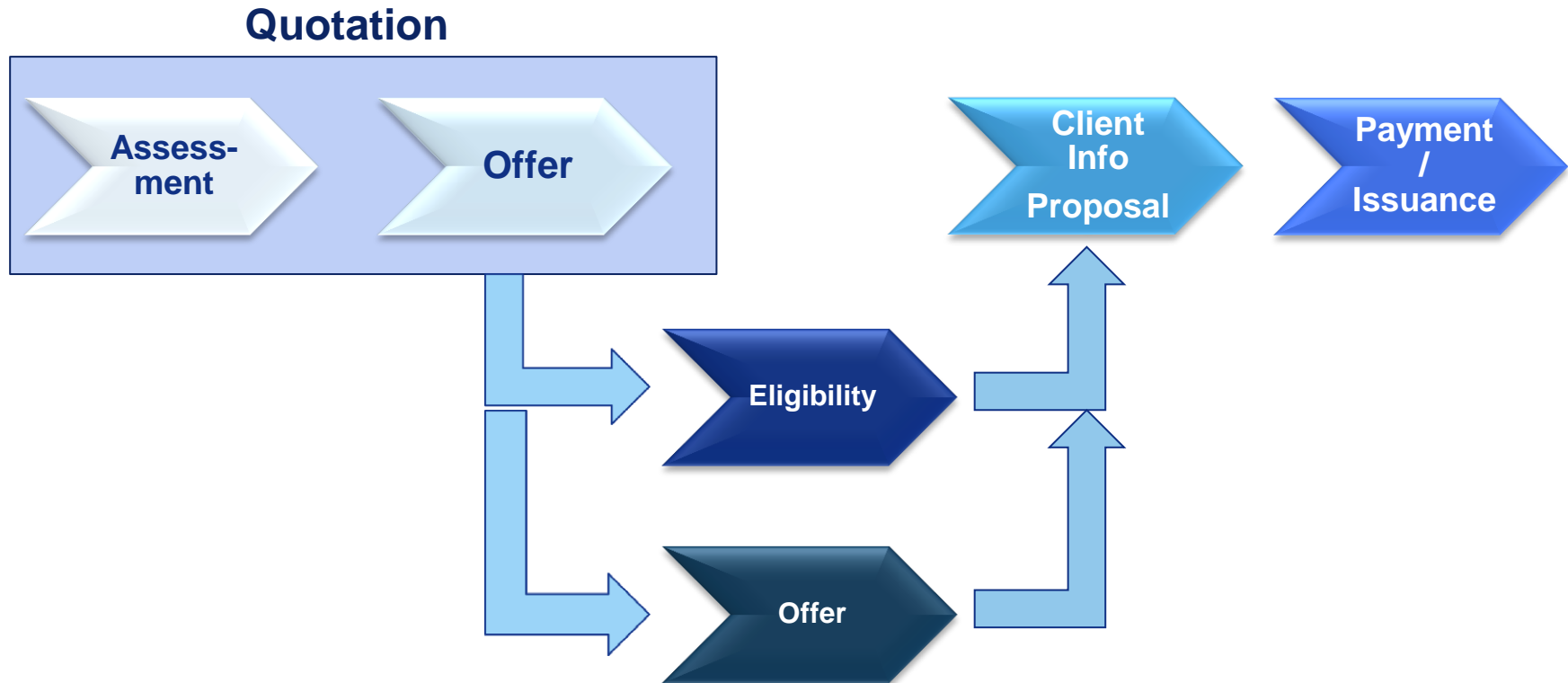


[HOMEPAGE](#)

Quotation Acceptance – Agent to assist using Manage page



New Business – Referrals (Non-STP)



Referrals (Non-STP) - Eligibility

Claim History

* Any claims in past 3 years
for Policyholder
and/or driver

☒ Yes ☐ No

* Number of accidents/claims
(excl. windscreen)?

0 ▾

* Number of windscreen claims?

0 ▾

* Total claim amount

\$

Continue ►

Our Offer

Sorry, we are unable to provide you with a quote as a result of one or more of the answers you provided

Click below to send your information to AXA for a referral.

Submit for referral ►

Referrals (Non-STP) - Offer

Your selection

PRODUCT		PACKS		ADD-ONS		DISCOUNTS		TOTAL
SmartDrive Comprehensive "Flexi"	+	Duo Protector Claim Protector	+	Double Excess Car Protector	-	Early Bird New Vehicle Super Sales	=	\$1,988.00 (incl. GST) Comm. \$198.80

PRICE ADJUSTMENT

Commissions are calculated on pre-GST premiums and exclude GST on the commission itself

AUTHORITY DISCOUNT

☒ \$ ☐ %

max
\$20,000

COMMISSION RATE

☐ \$ ☒ %

15% 0%

☐ Applicable at renewal

PREVIOUS |

CONTINUE ▶

| SAVE

| REFER

| CANCEL

Referrals (Non-STP) - Offer

Where client type
is Corporate

Client Details

Refer your quote

☒ Corporate

* Company name

Vehicle registration
number

* Registration
Number

* Phone

* Country

SINGAPORE

* Send email to

Client

↳ Enter email address

Comments

REFER ▶

| BACK

Referrals (Non-STP) - Offer

Refer your quote

Client Details

Where client type
is Individual



☒ Individual ☐ Corporate

* Main driver is also
the policy holder

☒ Yes ☐ No

* Surname

Vehicle registration
number

* Given name

* Phone

Display name as

Surname + Given name ▼

* Send email to

Client ▼

* FIN / NRIC

↳ Enter email address

Comments

REFER ►

| BACK

End Slide