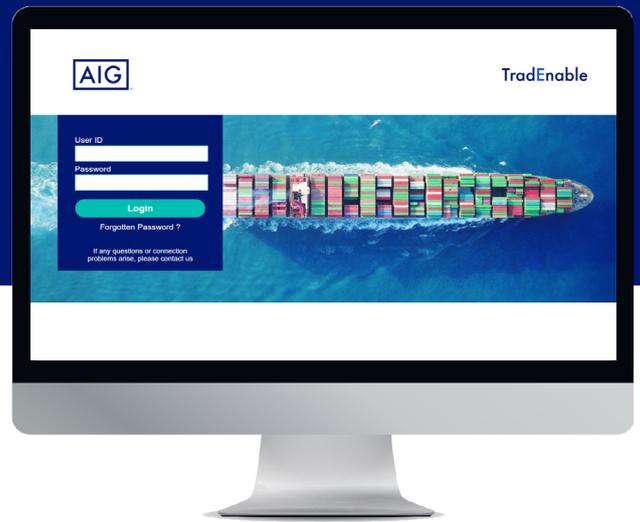


## AIG QUICK REFERENCE GUIDE

# TradEnable Portal Portal Functionality



## Overview

AIG's new TradEnable system allows Brokers and Policy Holders to administer and track policy activity via the **TradEnable portal**. Initial functionality includes the ability to add new Buyers/limits to an existing policy, update limits for an existing Buyer, and cancel existing limits.

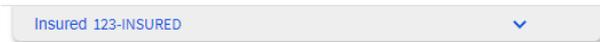
You can also use the Portal to create and manage other users from your organisation.

The Portal is divided into an **Insured Portal** and a **Broker Portal**.

## Insured Portal

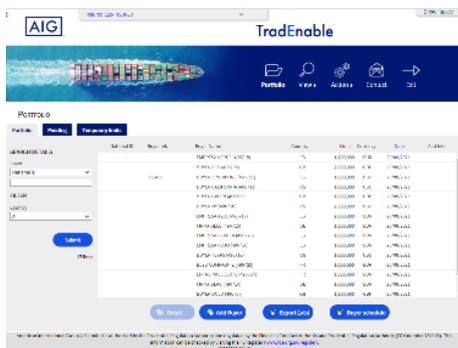
The Insured Portal is available to Brokers and Policy Holders.

When you log in as a Broker a dropdown menu at the top of the screen allows you to select the Policy Holder you wish to work with.



*Policy Holder selection dropdown for Brokers*

If you are a Policy Holder, the Portal will open onto the **Portfolio** page for your policy, or the default homepage you have set within your preferences (Profile Management).



*Portfolio Page*

From the Portfolio page, both Brokers and Policy Holders can perform the following tasks:

### View Limits

The Portfolio page opens in grid form, detailing the limits of all the buyers for your policy. There is a filter section to the left which allows you to filter the list according to various criteria.

### Add a Buyer/limit

Broker and Policy Holders can use the portal to add a buyer and subsequently request a limit. This functionality can be accessed from the **Add Buyer** button.

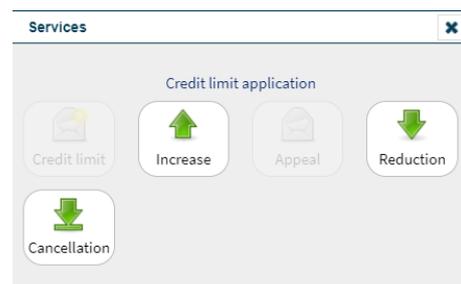
### View historical detail of the policy

The Application History option can be accessed by hovering over the **View** button in the menu bar and clicking on **Application History** from the menu. This will list all types of requests (Credit Limit, Appeal, Increase, Reduction and cancellation) previously made for the policy. To return to the Portfolio, you can click on the **Portfolio** icon from the same menu.

### Make a limit request for the selected existing buyer

If you click on a buyer, the **Detail** button becomes activated. When you click on this button, you will see more information related to the selected buyer and use the **Services** button to request an increase, decrease or cancellation of that Buyer's limit.

For a previous restrictive limit granted, you can appeal the decision as well and eventually provide additional information to the Underwriter who will review your appeal request.



*Services available for selected Buyer*

