AVIVA PRIVATE CLIENTS

How to Guide

Aviva Private Clients Online



Welcome to Aviva Private Clients Online!

Our self-serve broker platform, where brokers can quote, bind, manage mid-term adjustments and renewals for both Refine and Smart Home products.

We've put this together to provide a step-by-step guide for completing simple transactions and a few useful tips to help get started with APC Online.

Happy quoting!

Table of Contents

Transactions	64				
<u>1.</u>	How to upload a valuation4				
<u>2.</u>	How to complete a mid-term adjustment5				
Other tips and hints6					
<u>3.</u>	Blanket buildings vs sums insured policy6				
<u>4.</u>	Where to find client documents6				
<u>5.</u>	How to update commission and excess7				
<u>6.</u>	How to filter quotes and policies8				
<u>7.</u>	How to flex on premium9				
<u>8.</u>	How to add additional notes9				
<u>9.</u>	How to lapse a policy10				

Transactions

How to upload a valuation

Please note the valuation must contain a full description of the insured item and is required to be submitted within 30 days of cover starting.

Valuations must be independent and made by a qualified and accredited valuer. The valuer and the company that made the valuation must be clearly stated on the valuation.

1. Click on **Policies** in the top navigation bar

	AVIVA PRIVATE CLIENTS								
		Home	Quotes	Renewals	Policies	Knowled	dge		
2.	Search for you	r client					/	Sear	rch
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1	ABC Test		ASH000011562			GBP 1,883.27	30/06/2024	Issued	

- 3. Click on Policy Name
- 4. From the menu of options on the right, click on Valuation Upload

	/	MTA
	×	Cancel
		Send Documents
\langle		Valuation Upload

5. Follow the steps to upload the valuation

How to complete a mid-term adjustment

A few examples of simple mid-term adjustments you can complete on APC Online.

Update your client's jewellery or fine art limits, add a newly purchased item, update an occupation, update security or change of address.

1. Click on **Policies** in the top navigation bar



5. Follow the steps to update your client's policy

Other tips and hints

Blanket buildings vs sums insured policy

Smart Home is a blanket buildings policy which implies you **DO NOT** need to enter a building sum insured. By using data enrichment, we will gather information related to your client's risk location to help calculate a sum insured.

Refine Home is based on sums insured, which implies you **DO** have to enter a sum insured for both buildings and contents.

In both instances we will proactively warn you if our data detects any potential underinsurance. If our data suggests that the risk address is outside of appetite, then unfortunately the risk will decline. We cannot override our data to match you suggested rebuild.

Where to find client documents

To download a current copy of your client's quote or policy:



- 1. Click on Quotes in the top navigation bar
- 2. Search for your client
- 3. Click on Quote Number
- 4. Navigate to the **Notes & Attachments** section found on the right hand side of the page.

Notes & Attachments (3)	V
One updated three-ASH000011716-Renewal.pdf 10 Dec 2024 • Attachment	
One updated two-ASH000011716-MTA.pdf 10 Dec 2024 • Attachment	
One updated-ASH000011716-New Business.pdf 10 Dec 2024 • Attachment	
	View All

How to update commission and excess

You can edit the commission and excess on a new quote without having to redo the entire quote process, to do this:

1. Click on Quotes in the top navigation bar



- 3. Click on Quote Number
- 4. From the menu of options on the right, click on Edit Commission/Excess



How to filter quotes and policies

You can have different list views of quotes and policies. For instance, you can view your quotes, or you can view all the quotes for your office. To filter your view:

1. Click on **Quotes** in the top navigation bar



2. Choose your view by clicking on the drop down arrow.



- Choose All Quotes to see your quotes only
- Choose All Quotes My Brokerage to see all quotes for your office

The same applies for policies.

How to flex on premium

If you're looking for a better rate, you can achieve this by using the commission and or excess slider found on the **Coverage Summary** page.

As you move either slider up or down the premium will update in real time.



How to add additional notes

If you would like to provide additional information about your client or the risk, you can do this by clicking the **Refer to Underwriter** button found at the bottom of the **Coverage Summary** page. This is displayed at the end of the quote journey and is the same page as where you can edit the excess and commission at new business and renewal.



How to lapse a policy

A policy will automatically bind unless you switch the policy quote status to NTU. To do this:

1. Click on **Renewals** in the top navigation bar

AVIVA PRIVATE CLIENTS							
		Home	e Quotes	Renew	wals	Policies Knowledge	
2.	Search for yo	our client					
	Quotes						_
\$	Vpcoming Renewal Quotes						
2 items	Sorted by Quote Number • Filterer	d by All quotes - Status, Typ	e of Transaction • Updated	a few seconds ago		Q Search this list	\$ • C' & ▼
	Quote Number 🕈 🗸	Quote Name 🗸 🗸	Gross Premiu 🗸	Effective Date 🗸	Expiration D	✓ Created By	✓ Status ✓
1	QSH000164492	TestB_Policy	GBP 2,604.64	02/04/2025	10/04/2025	John.montgomery1.4853605968887314E12	Quoted

- 3. Click on **Quote Number**
- 4. From the menu of options on the right, click on Mark as NTU

