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

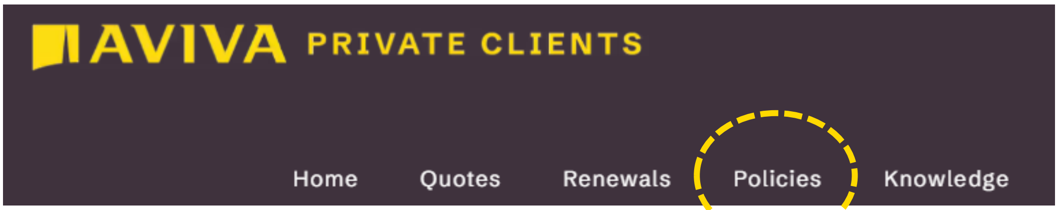
Transactions

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.

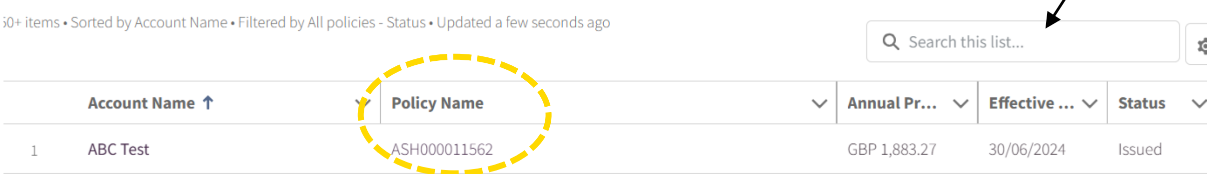
Valuations must be independent and made by a qualified and accredited valuer. The valuer and the company that made the valuation must be clearly stated on the valuation.

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

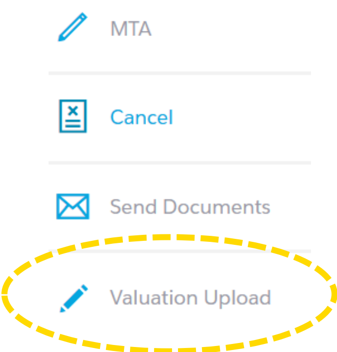


2. Search for your client

Search



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



5. Follow the steps to upload the valuation

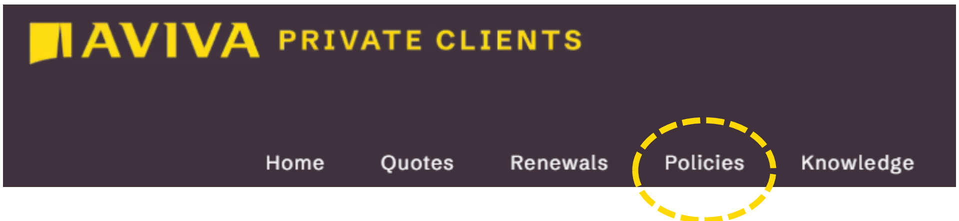
Back to TOC

How to complete a mid-term adjustment

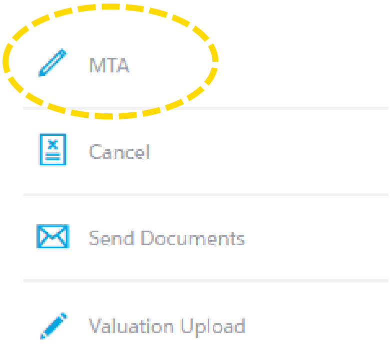
A few examples of simple mid-term adjustments you can complete on APC Online.

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



2. Search for your client
3. Click on **Policy Name**
4. From the menu of options on the right, click on **MTA**



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

Back to TOC

Other tips and hints

Blanket buildings vs sums insured policy

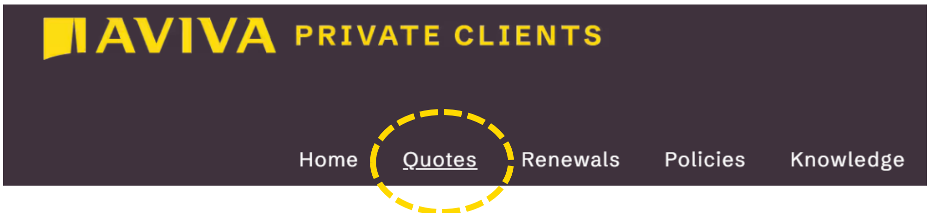
Smart Home is a blanket buildings policy which implies you **DO NOT** need to enter a building sum insured. By using data enrichment, we will gather information related to your client's risk location to help calculate a sum insured.

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

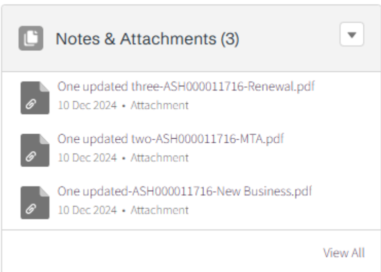
In both instances we will proactively warn you if our data detects any potential underinsurance. If our data suggests that the risk address is outside of appetite, then unfortunately the risk will decline. We cannot override our data to match you suggested rebuild.

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.

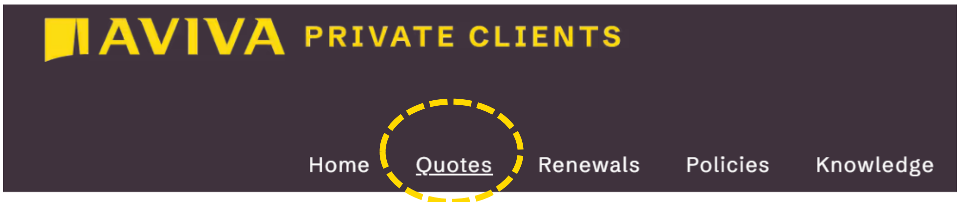


Back to TOC

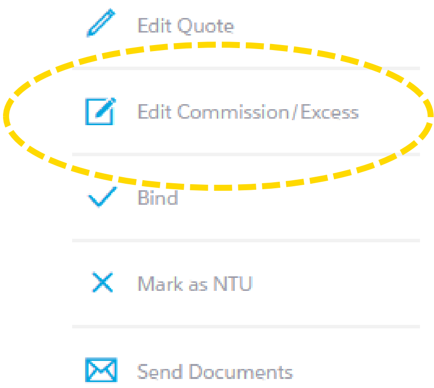
How to update commission and excess

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



2. Search for your client
3. Click on Quote Number
4. From the menu of options on the right, click on **Edit Commission/Excess**

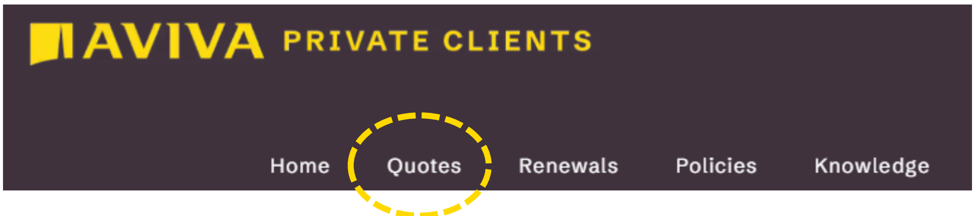


Back to TOC

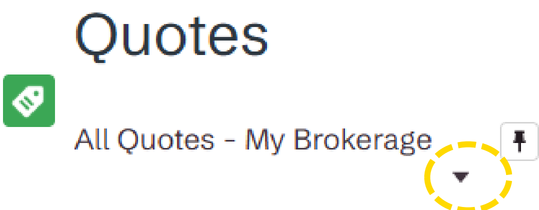
How to filter quotes and policies

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.



TIP: You can pin your view, so every time you login you have the same view.

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

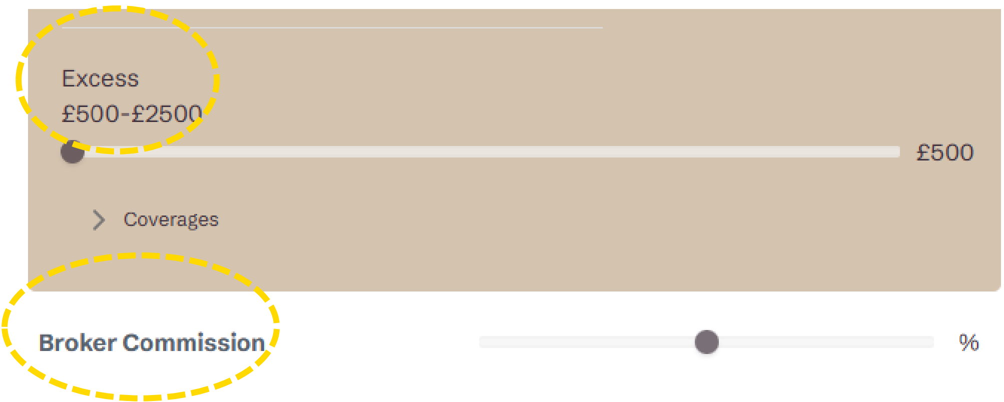
The same applies for policies.

[Back to TOC](#)

How to flex on premium

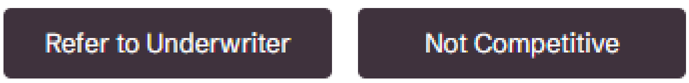
If you're looking for a better rate, you can achieve this by using the commission and or excess slider found on the **Coverage Summary** page.

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.

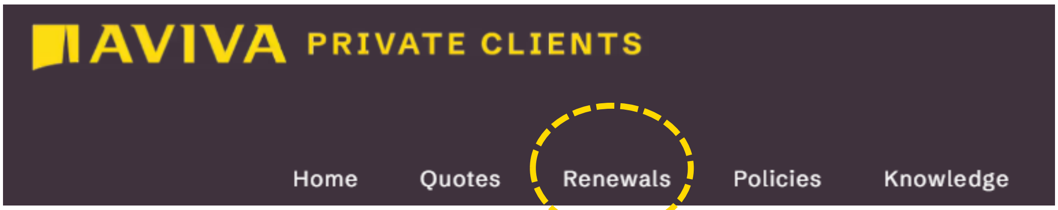


Back to TOC

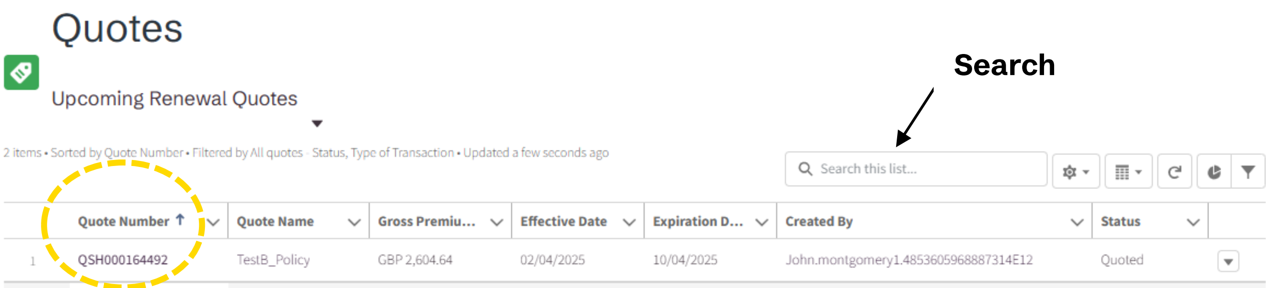
How to lapse a policy

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

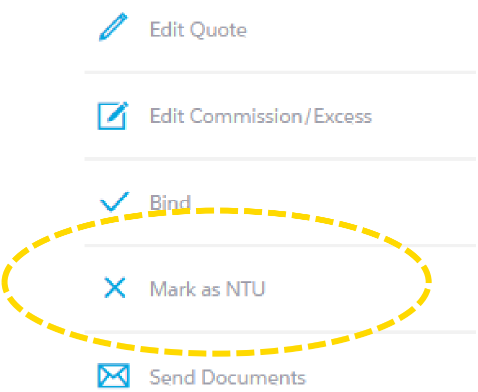
1. Click on **Renewals** in the top navigation bar



2. Search for your client



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



Back to TOC