

A guide to your



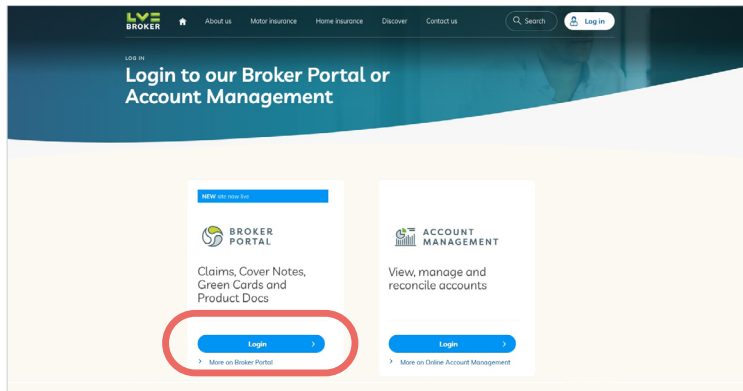
# Contents

The **LV= Broker Portal** helps you support your customers quickly and efficiently. Its self-serve capability means you can access claims updates, create Cover Notes and Green Cards, request proof of NCD and access policy docs and much more.

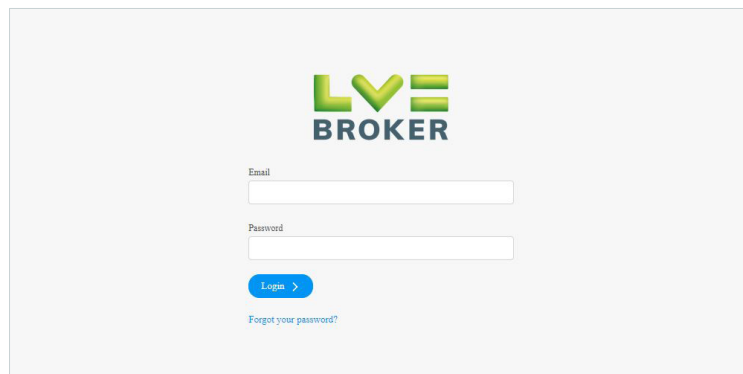


# Logging in

- 1.1 The broker Portal works best in Google Chrome or Edge
- 1.2 Login to the LV= Broker Portal [here](#)
- 1.3 You can also login from our [website](#)



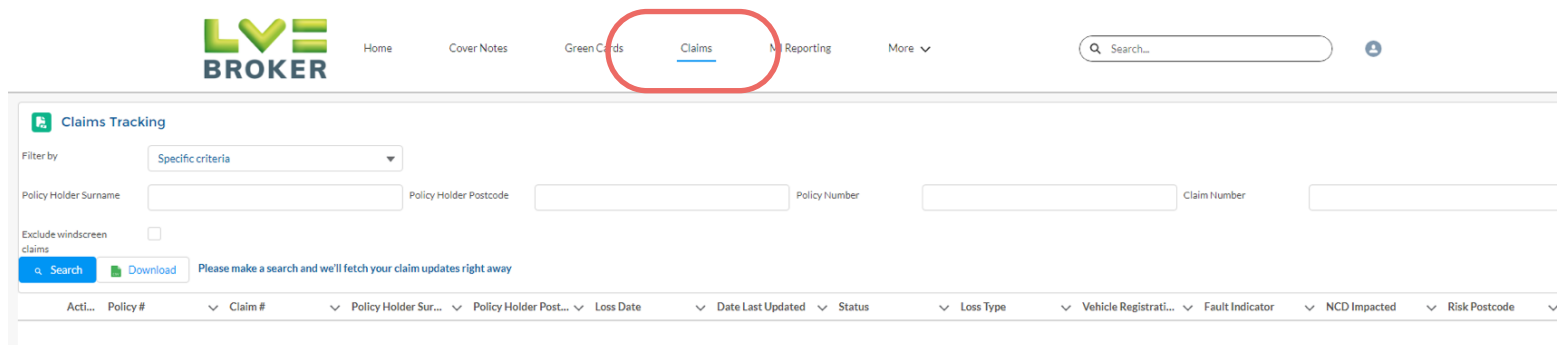
- 1.4 Enter your email address and the password you have setup




# Claims tracking

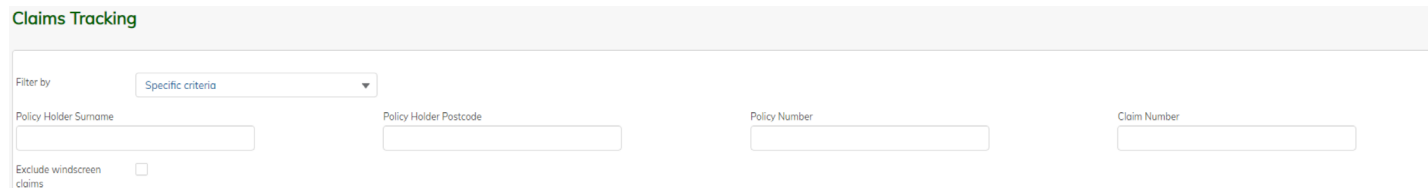
## Viewing your claims

2. Go to Home > **Claims**



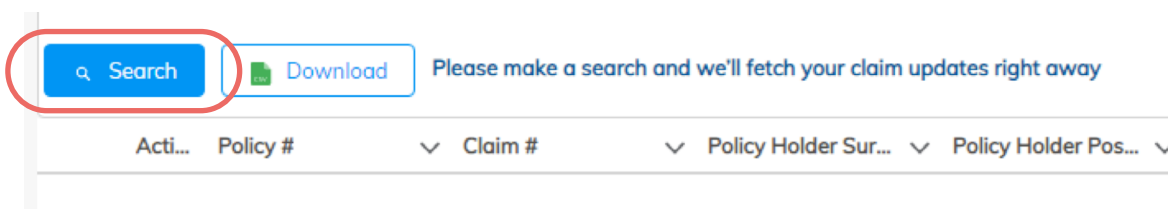
The screenshot shows the LVE BROKER portal interface. The navigation bar at the top includes 'Home', 'Cover Notes', 'Green Cards', 'Claims' (highlighted with a red circle), 'My Reporting', and 'More'. A search bar is located on the right. Below the navigation bar, the 'Claims Tracking' section is displayed. It features a 'Filter by' dropdown menu set to 'Specific criteria'. Below this are input fields for 'Policy Holder Surname', 'Policy Holder Postcode', 'Policy Number', and 'Claim Number'. There is also a checkbox for 'Exclude windscreen claims'. A 'Search' button (highlighted with a red circle) and a 'Download' button are present. A message states: 'Please make a search and we'll fetch your claim updates right away'. Below the search area is a table header with columns: 'Acti...', 'Policy #', 'Claim #', 'Policy Holder Sur...', 'Policy Holder Post...', 'Loss Date', 'Date Last Updated', 'Status', 'Loss Type', 'Vehicle Registrati...', 'Fault Indicator', 'NCD Impacted', and 'Risk Postcode'.

2.1 Find your claims by using one of the search fields, you'll need to search the full criteria  
e.g. a full policy number not just 800



This is a close-up of the 'Claims Tracking' search filters. It shows the 'Filter by' dropdown set to 'Specific criteria'. Below it are four input fields: 'Policy Holder Surname', 'Policy Holder Postcode', 'Policy Number', and 'Claim Number'. There is also a checkbox for 'Exclude windscreen claims'.

2.2 Click **Search** to populate your claims

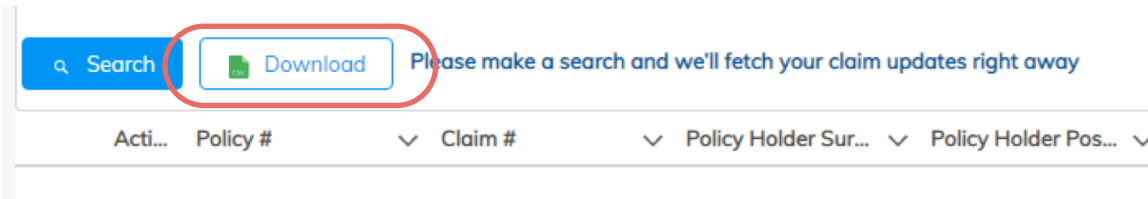


This is a close-up of the 'Search' button in the 'Claims Tracking' section. The button is highlighted with a red circle. Next to it is a 'Download' button and a message: 'Please make a search and we'll fetch your claim updates right away'. Below the buttons is a table header with columns: 'Acti...', 'Policy #', 'Claim #', 'Policy Holder Sur...', and 'Policy Holder Pos...'.

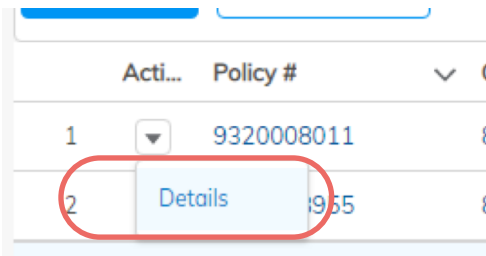




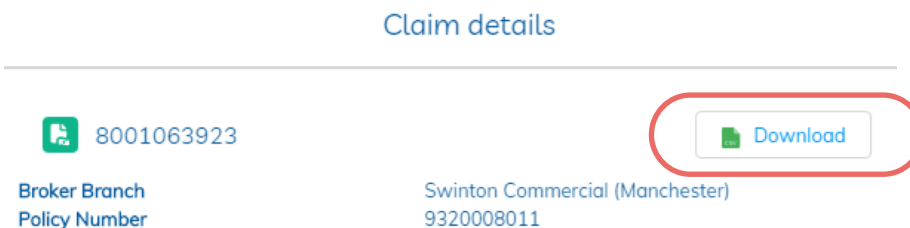
2.3 You'll then be able to download all of the claims from your search by clicking **Download**



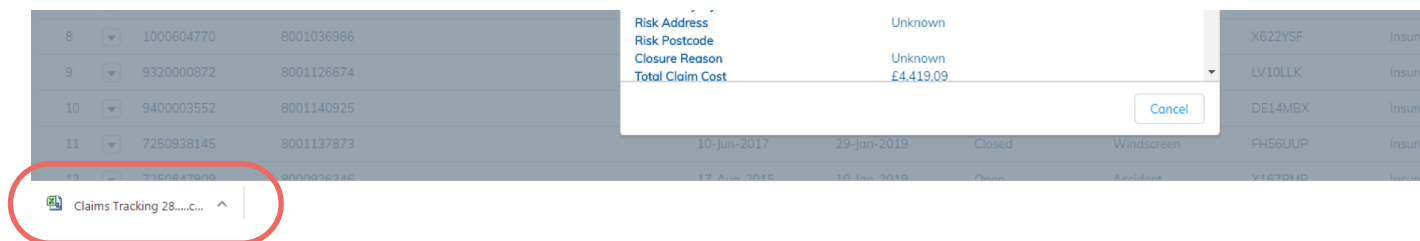
2.4 To download a single claim, find the claim then select the drop down under **Action** and select **Details**



2.5 This will bring up the full claims details, select the **Download** button to grab a copy

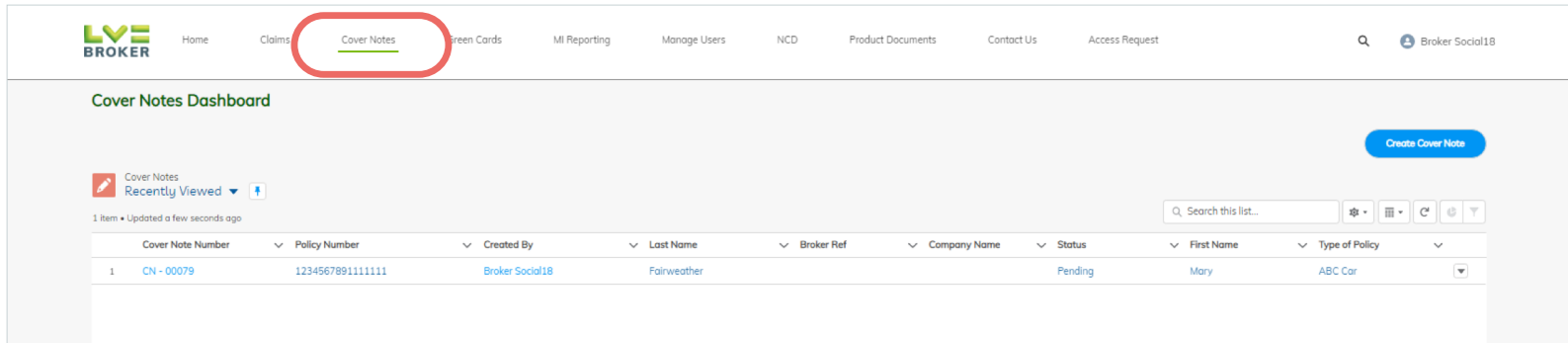


2.6 Assuming you're using Google Chrome, the Claims Report will **download straight away** and can be found in the **bottom left corner** of the browser




# Cover Notes

## 3. Home > Cover Notes



**Cover Notes Dashboard**

[Create Cover Note](#)

 Cover Notes  
Recently Viewed ▾

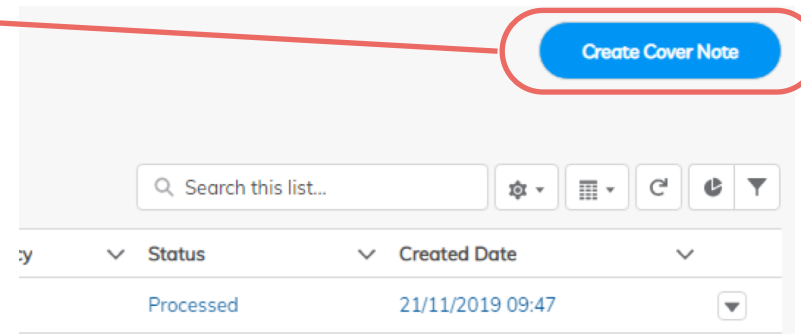
1 item • Updated a few seconds ago

	Cover Note Number	Policy Number	Created By	Last Name	Broker Ref	Company Name	Status	First Name	Type of Policy
1	<a href="#">CN - 00079</a>	1234567891111111	<a href="#">Broker Social18</a>	Fairweather			Pending	Mary	ABC Car



# Creating a Cover Note

4. From the Cover Note overview screen, click **Create Cover Note**

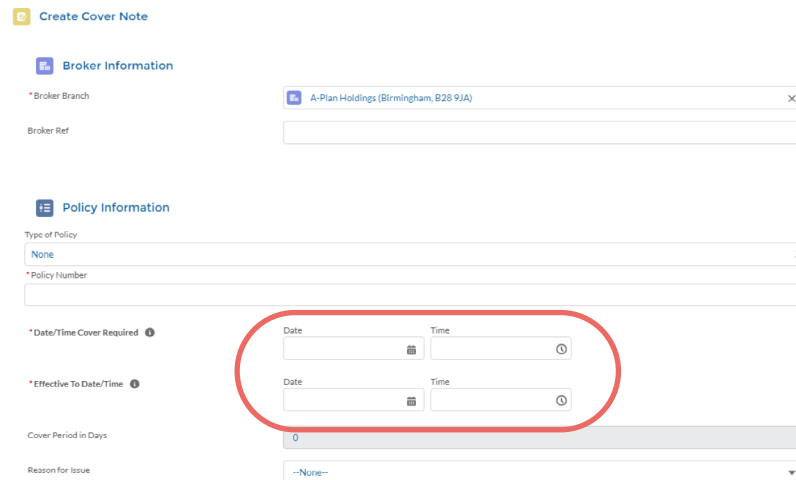


The screenshot shows the 'Create Cover Note' button highlighted with a red circle. Below the button is a search bar labeled 'Search this list...' and a table with columns for 'Status' and 'Created Date'. The table contains one row with the status 'Processed' and the date '21/11/2019 09:47'.

- 4.1 Search for and select the **Broker Branch** you're writing the Cover Note on behalf of and enter your Broker reference

Rather than a full step by step guide for every field, here's some helpful notes relating to specific functionality of the form.


- 4.2 **Cover Period:** Completing the Cover Required and Effective To fields will auto-populate the Cover Period in Days



The screenshot shows the 'Create Cover Note' form. The 'Broker Information' section includes a dropdown for 'Broker Branch' (selected: A-Plan Holdings (Birmingham, B28 9JA)) and a text field for 'Broker Ref'. The 'Policy Information' section includes a dropdown for 'Type of Policy' (selected: None) and a text field for 'Policy Number'. The 'Date/Time Cover Required' and 'Effective To Date/Time' fields are highlighted with a red circle. The 'Cover Period in Days' field is set to 0. The 'Reason for Issue' dropdown is set to '--None--'.



#### 4.3 Vehicle Reg lookup: If a vehicle registration cannot be found, manual fields will appear

 Vehicle Details

Vehicle Registration
 
Next

Aw, snap! We couldn't find a match for that registration. Please enter the details manually.

Vehicle Type

\* Vehicle Make


\* Vehicle Model

\* Year of Manufacture

\* Vehicle CC

\* Registration, Chassis or Engine Number

#### 4.4 Persons Entitled to Drive and Adding Driver Excesses: When adding a Driver. Click **Add Driver**, then click the **Pen** icon in the table to open the field for editing. When adding driver excesses, click the **Pen** icon in the table to open the field for editing.


 Persons Entitled to Drive


Persons Entitled to Drive

Add Driver

To enter a driver's name please hover over the cells in the table and click on the pen

First Name	Last Name

 Driver Excesses

Driver	Accident	Fire	Theft	Windscreen
1 All Drivers	250 	250	250	75



#### 4.5 Submitting Cover Note: Once all details are entered click **Submit**

##### Premium Information

Gross Premium Incl. IPT

Is This Policy Net Rated?

☐

Cancel Submit

#### 4.6 Review Cover Note: After clicking Submit, the page will jump to the top and ask you to review all details to make sure they're accurate.

##### Create Cover Note

Please review the inserted data and confirm with 'Submit'

##### Broker Information

\* Broker Branch

 Swinton Group Ltd (Manchester, M1 6LT)

#### 4.7 Amend/Submit Cover Note: To make a change to the Cover Note, click Back. To finalise the Cover Note click the now Green **Submit** button

##### Premium Information

Gross Premium Incl. IPT

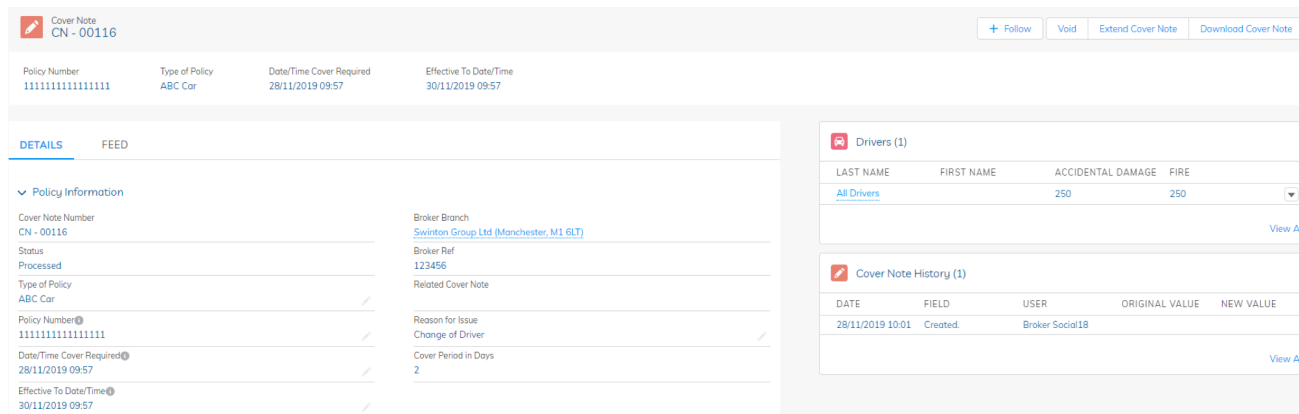
Is This Policy Net Rated?

☐

Back Submit



#### 4.8 You will now see a summary of the Cover Note you've created



**Cover Note**  
CN - 00116

[+ Follow](#) [Void](#) [Extend Cover Note](#) [Download Cover Note](#)

Policy Number	Type of Policy	Date/Time Cover Required	Effective To Date/Time
11111111111111111111	ABC Car	28/11/2019 09:57	30/11/2019 09:57

**DETAILS** **FEED**

**Policy Information**

Cover Note Number	CN - 00116	Broker Branch	Swinerton Group Ltd (Manchester, M1 6LT)
Status	Processed	Broker Ref	123456
Type of Policy	ABC Car	Related Cover Note	
Policy Number	11111111111111111111	Reason for Issue	Change of Driver
Date/Time Cover Required	28/11/2019 09:57	Cover Period in Days	2
Effective To Date/Time	30/11/2019 09:57		

**Drivers (1)**

LAST NAME	FIRST NAME	ACCIDENTAL DAMAGE	FIRE
<a href="#">All Drivers</a>		250	250

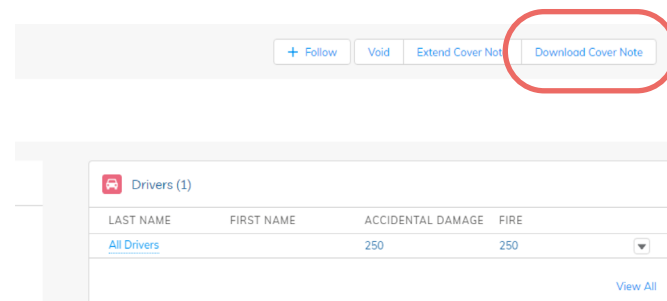
[View All](#)

**Cover Note History (1)**

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
28/11/2019 10:01	Created.	Broker Social18		

[View All](#)

#### 4.9 Download Cover Note: Click Download Cover Note in the top right corner of the overview screen



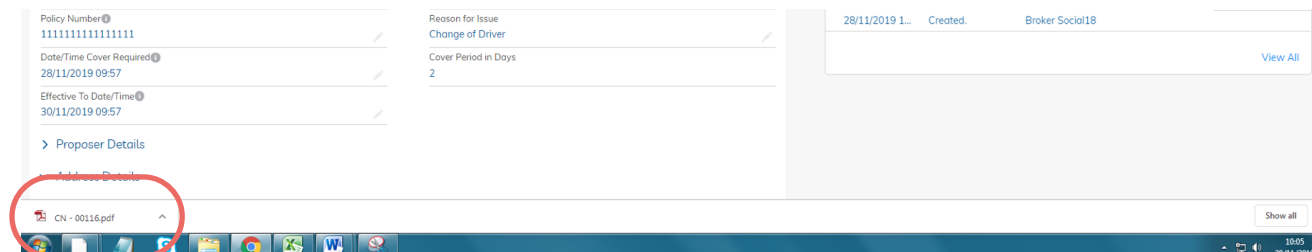
[+ Follow](#) [Void](#) [Extend Cover Note](#) [Download Cover Note](#)

**Drivers (1)**

LAST NAME	FIRST NAME	ACCIDENTAL DAMAGE	FIRE
<a href="#">All Drivers</a>		250	250

[View All](#)

#### 4.10 Assuming you're using Google Chrome, the Cover Note will download straight away and can be found in the bottom left corner of the browser



Policy Number: 11111111111111111111

Date/Time Cover Required: 28/11/2019 09:57

Effective To Date/Time: 30/11/2019 09:57

Reason for Issue: Change of Driver

Cover Period in Days: 2

28/11/2019 10:01 Created. Broker Social18

[View All](#)

[Download Cover Note](#)

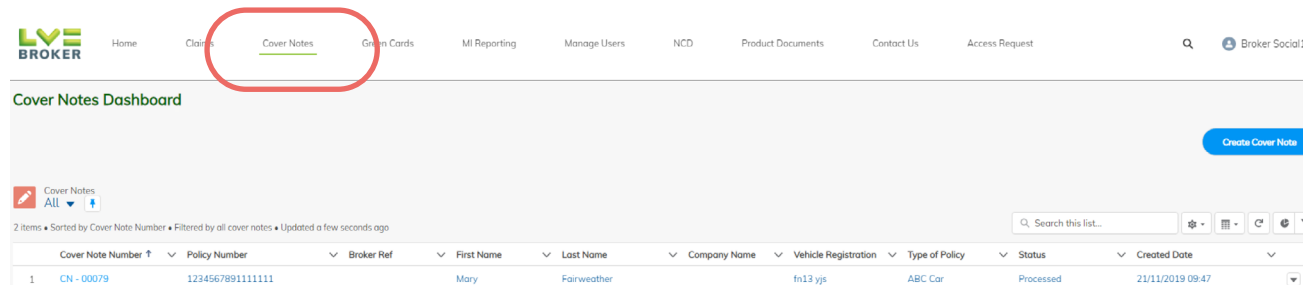
CN - 00116.pdf





# Cover Note extensions

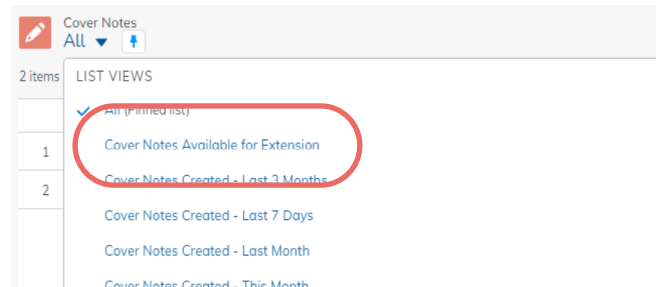
4.11 Click **Cover Notes** to access the Cover Note Overview table



The screenshot shows the LVE BROKER portal navigation bar. The 'Cover Notes' menu item is circled in red. Below the navigation bar, the 'Cover Notes Dashboard' is visible, featuring a 'Create Cover Note' button and a table of cover notes.

Cover Note Number	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1 CN - 00079	1234567891111111		Mary	Fairweather		fn13 yjs	ABC Car	Processed	21/11/2019 09:47

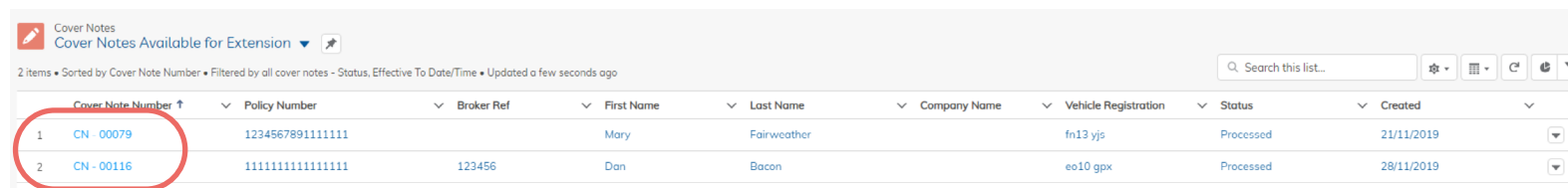
4.12 To view all Cover Notes available for extension, click the down arrow next to your current View and click **Cover Notes Available for Extension**



The screenshot shows the 'Cover Notes' view dropdown menu. The 'Cover Notes Available for Extension' option is circled in red. Other options include 'All (Printed list)', 'Cover Notes Created - Last 3 Months', 'Cover Notes Created - Last 7 Days', 'Cover Notes Created - Last Month', and 'Cover Notes Created - This Month'.

4.13 Your View will now show you only the **Cover Notes Available for Extension**

4.14 Click the CN - ##### reference to open the Cover Note details screen

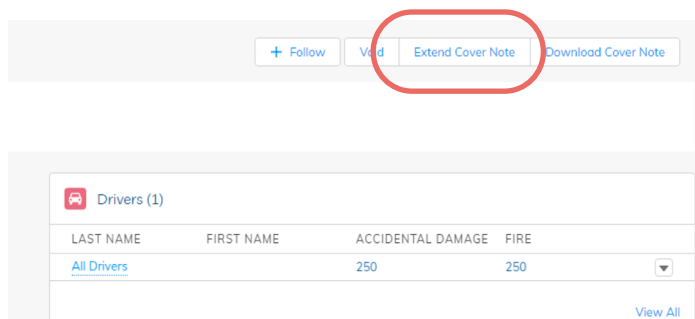


The screenshot shows the 'Cover Notes Available for Extension' view. The first two rows of the table are circled in red. The table displays cover notes with their respective details.

Cover Note Number	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Status	Created
1 CN - 00079	1234567891111111		Mary	Fairweather		fn13 yjs	Processed	21/11/2019
2 CN - 00116	1111111111111111	123456	Dan	Bacon		eo10 gpx	Processed	28/11/2019

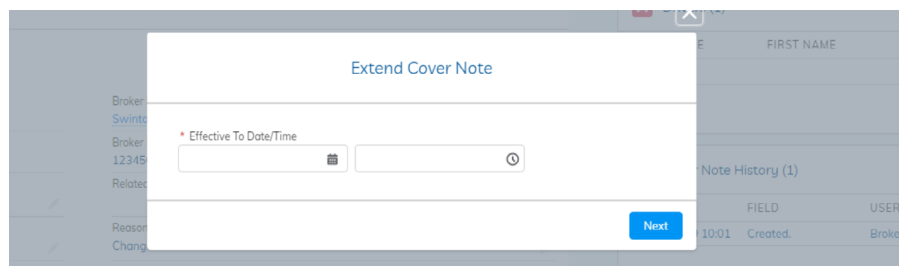


4.15 In the top right corner, click **Extend Cover Note**

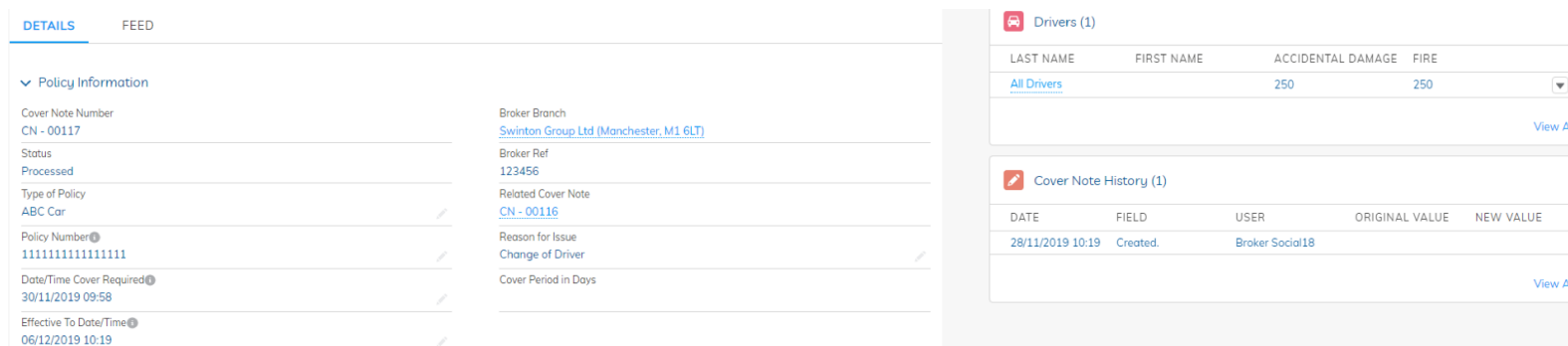


4.16 Enter the new **Effective To Date/Time** and click **Next**

4.16.1 The new Effective From Date/Time will be automatically populated with the previous Cover Note's Effective To Date/Time plus 1 minute

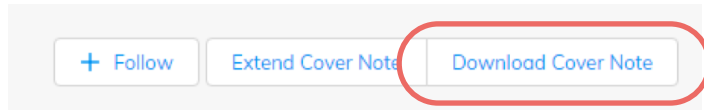


4.17 You will now see the new extended Cover Note details page



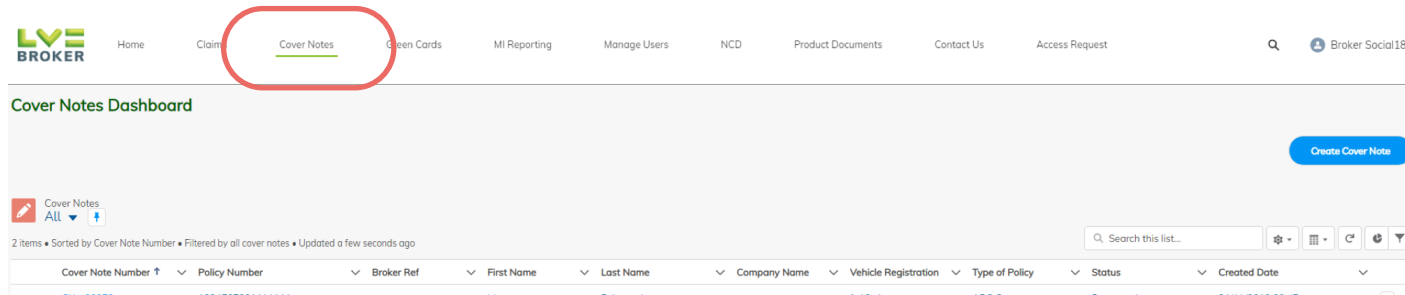
#### 4.18 Click **Download Cover Note**

Assuming you're using Google Chrome, the Cover Note will **download straight away** and can be found in the **bottom left corner** of the Browser



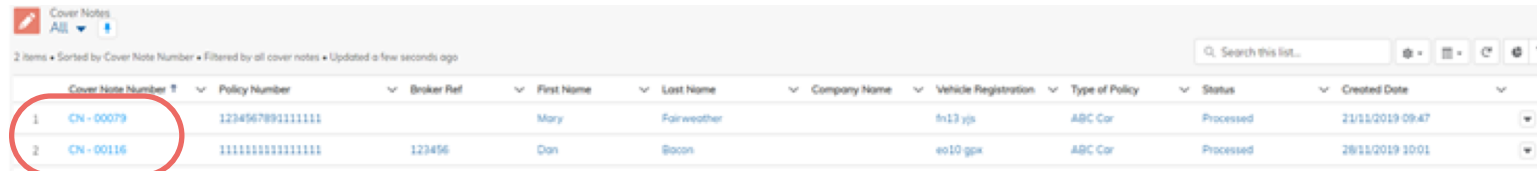
# Voiding a Cover Note

4.19 Click **Cover Notes** to access the Cover Note Overview table



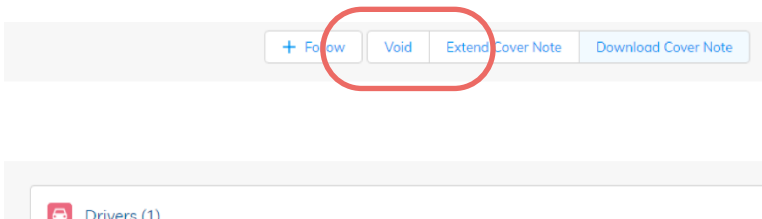
The screenshot shows the LVE BROKER portal interface. The 'Cover Notes' tab is highlighted in the top navigation bar. Below the navigation bar, the 'Cover Notes Dashboard' is visible, featuring a 'Create Cover Note' button and a table of cover notes. The table has columns for Cover Note Number, Policy Number, Broker Ref, First Name, Last Name, Company Name, Vehicle Registration, Type of Policy, Status, and Created Date. Two items are listed in the table.

4.20 Click the **CN - ##### reference** to open the Cover Note details screen of the Cover Note you wish to Void



Cover Note Number	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1 CN - 00079	123456789111111		Mary	Fairweather		tn13 yjs	ABC Car	Processed	21/11/2019 09:47
2 CN - 00116	111111111111111	123456	Don	Bacon		eo10 gpx	ABC Car	Processed	28/11/2019 10:01

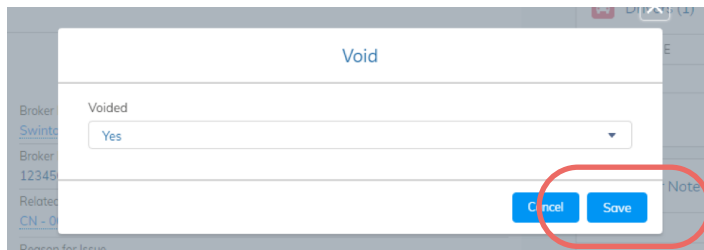
4.21 Click **Void**



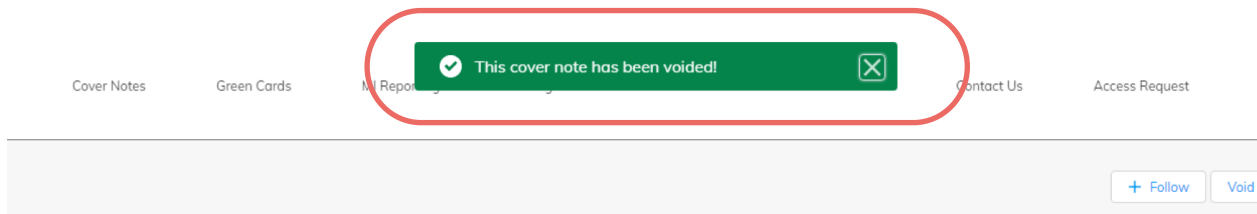
The screenshot shows the 'Cover Note details' screen. At the top, there are four buttons: '+ Follow', 'Void', 'Extend Cover Note', and 'Download Cover Note'. The 'Void' button is highlighted with a red circle. Below the buttons, there is a section titled 'Drivers (1)'.



4.22 Select Voided **Yes** in the dropdown and click **Save**



4.23 The Cover Note will now be **Voided** and a confirmation message will show



4.24 The Cover Note **Status** will now show as **Void**

Cover Notes

All

3 items • Sorted by Cover Note Number • Filtered by all cover notes • Updated a few seconds ago

Search this list...

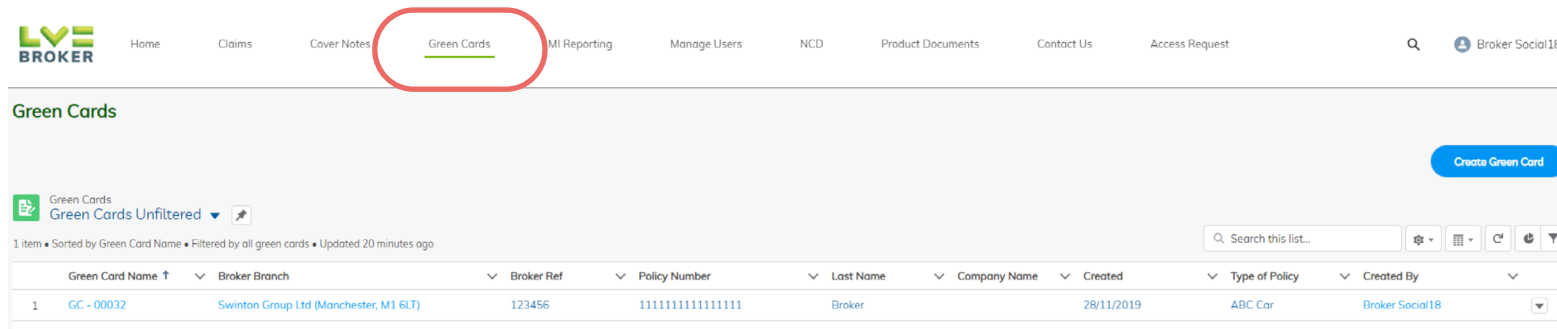
	Cover Note Number ↑	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1	CN - 00079	1234567891111111		Mary	Fairweather		fn13 yjs	ABC Car	Processed	21/11/2019 09:47
2	CN - 00116	1111111111111111	123456	Dan	Bacon		eo10 gpx	ABC Car	Processed	28/11/2019 10:01
3	CN - 00117	1111111111111111	123456	Dan	Bacon		eo10 gpx	ABC Car	Void	28/11/2019 10:19



# Green Cards

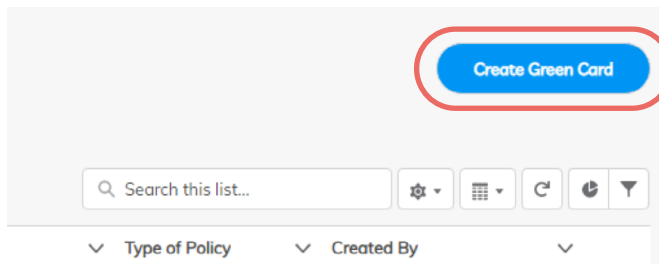
## Creating a Green Card

5. Go to Home > **Green Cards**



The screenshot shows the LVE BROKER portal interface. The top navigation bar includes links for Home, Claims, Cover Notes, **Green Cards** (highlighted with a red circle), MI Reporting, Manage Users, NCD, Product Documents, Contact Us, and Access Request. Below the navigation bar, the 'Green Cards' section is displayed. It features a 'Create Green Card' button in the top right corner. A table lists the existing Green Cards, with one item shown: GC - 00032, Swinton Group Ltd (Manchester, M1 6LT), 123456, 1111111111111111, Broker, 28/11/2019, ABC Car, and Broker Social18.

5.1 From the Green Card overview screen click **Create Green Card**



The screenshot shows the 'Create Green Card' button highlighted with a red circle. Below the button is a search bar labeled 'Search this list...' and a table with columns for Type of Policy and Created By.

5.2 Search for and select the Branch you're writing the Green Card on behalf of




The screenshot shows the 'Create Green Card' form. The 'Broker Information' section is highlighted with a red circle. It includes a dropdown menu for 'Broker Branch' with the selected value 'Swinton Group Ltd (Manchester, M1 6LT)'. Below the dropdown is a text input field for 'Broker Ref'.

The following notes relate to specific functionality of the form, this is not a step by step guide for every field





### 5.3 **Cover Period:** Completing the Cover Required and Effective To fields will auto-populate the Cover Period in Days

 **Policy Information**

Type of Policy  
None


\* Policy Number

\* Date Cover Required ⓘ 28-Nov-2019

\* Policy Expiry Date ⓘ

Cover Period in Days 0


### 5.4 **Vehicle Category:** The vehicle category chosen will drive the vehicle category printed on the Green Card

 **Vehicle Details**

\* Green Card Vehicle Category Car

Vehicle Registration

Will you be towing a Caravan or Trailer?

 **Named Drivers**

Any person insured to drive this vehicle abroad must be named

Add named driver(s) other than Proposer

--None--

✓ Car

Van

Motorcycle

Motorhome

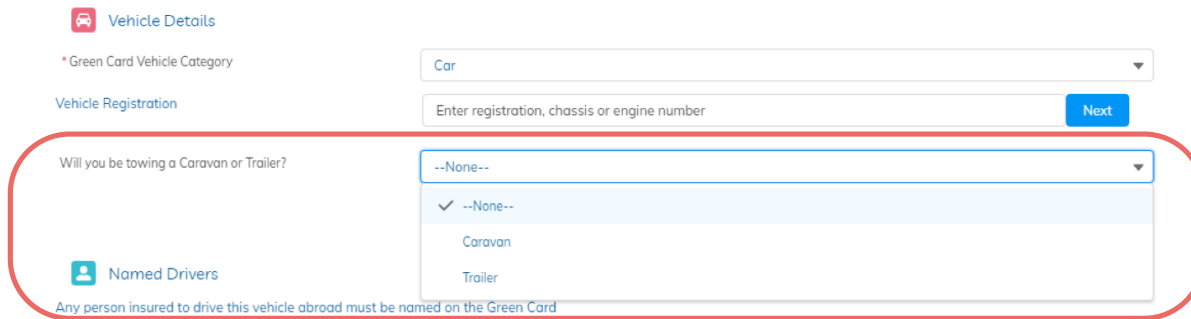
Caravan

Trailer

Lorry or Tractor



**5.5 Will you be towing a Caravan or a Trailer?** If this option is selected, a second Green Card will be produced with the appropriate details using the details entered in this section of the form.



**Vehicle Details**

\* Green Card Vehicle Category: Car

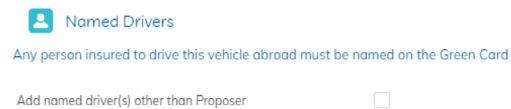
Vehicle Registration: Enter registration, chassis or engine number Next

Will you be towing a Caravan or Trailer? --None--

**Named Drivers**

Any person insured to drive this vehicle abroad must be named on the Green Card

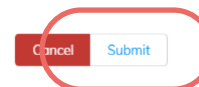
**5.6** Once all details are entered click **Submit**



**Named Drivers**

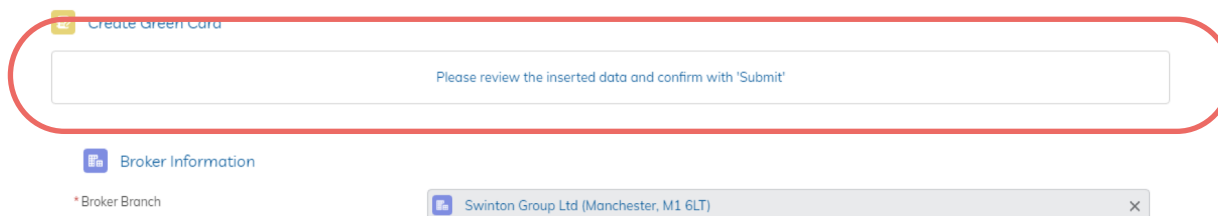
Any person insured to drive this vehicle abroad must be named on the Green Card

Add named driver(s) other than Proposer ☐



Cancel Submit

**5.7 Review Green Card:** After clicking Submit, the page will jump to the top and ask you to review all details to make sure they're accurate.



**Create Green Card**

Please review the inserted data and confirm with 'Submit'

**Broker Information**

\* Broker Branch: Swinton Group Ltd (Manchester, M1 6LT)

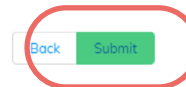


**5.8 Amend/Submit Cover Note:** To make a change to the Green Card, click Back.  
To finalise the Green Card click the Green **Submit** button

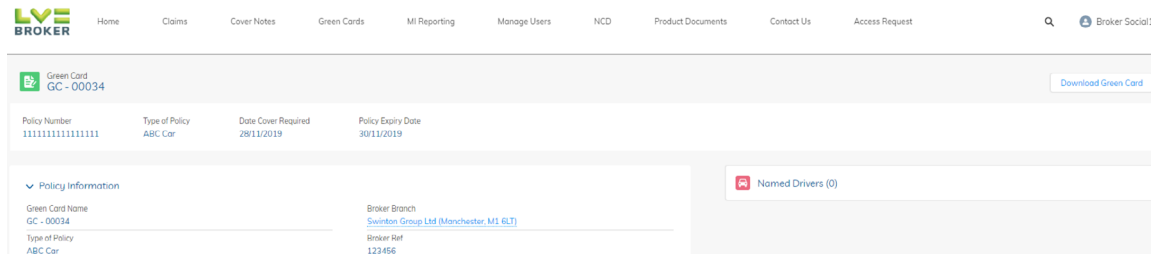
#### Named Drivers

Any person insured to drive this vehicle abroad must be named on the Green Card

Add named driver(s) other than Proposer ☐



**5.9** You'll now see a summary of the Green Card you've created



**LVE BROKER** Home Claims Cover Notes Green Cards MI Reporting Manage Users NCD Product Documents Contact Us Access Request

Green Card  
GC - 00034 [Download Green Card](#)

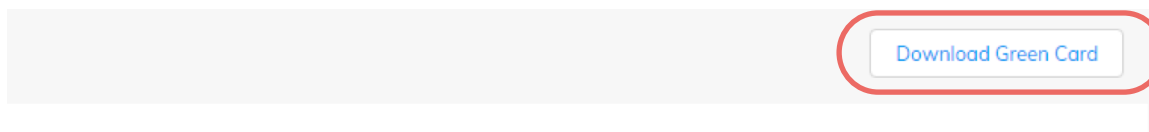
Policy Number	Type of Policy	Date Cover Required	Policy Expiry Date
11111111111111111111	ABC Car	28/11/2019	30/11/2019

Policy Information

Green Card Name GC - 00034	Broker Branch <a href="#">Swinton Group Ltd (Manchester, M1 6LT)</a>
Type of Policy ABC Car	Broker Ref 123456

Named Drivers (0)

**5.10 Download Green Card:** Click **Download Green Card** in the top right corner of the overview screen



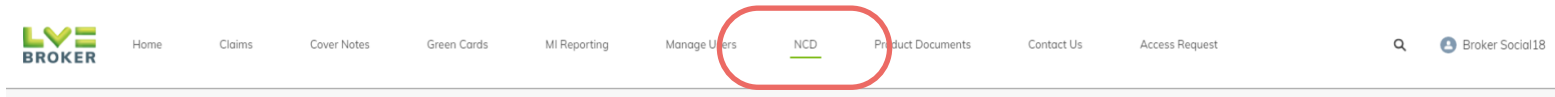
**5.11** Assuming you're using Google Chrome, the Green Card will **download straight away** and can be found in the **bottom left corner of the browser**



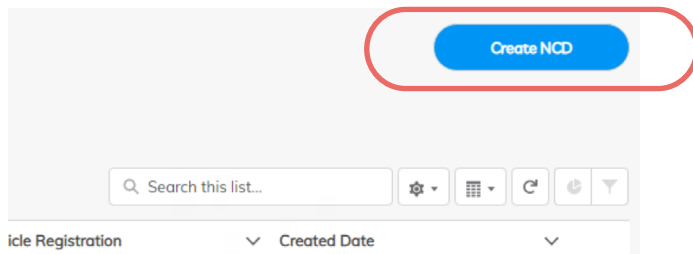
# NCD

## Request No Claims Discount

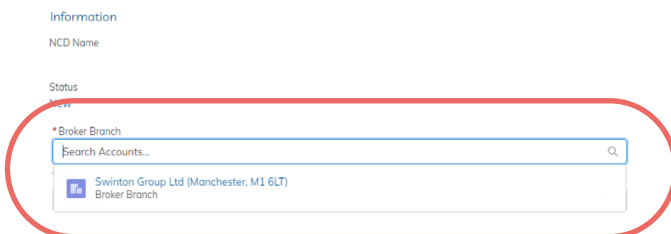
6 Go to Home > **NCD**



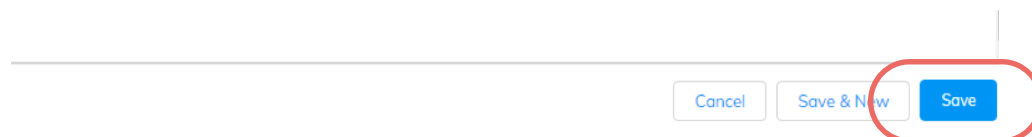
6.1 From the NCD overview screen click **Create NCD**



6.2 Search for and select the Broker Branch



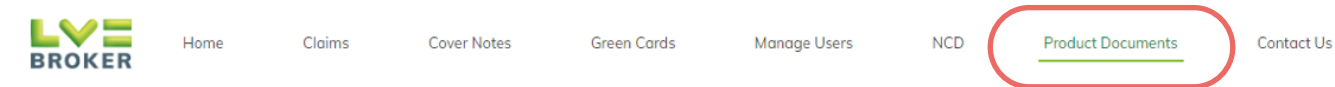
6.3 Fill in the details and click **Save**



# Product Documents

## Ordering Stationery

7 Go to Home > **Product Documents**

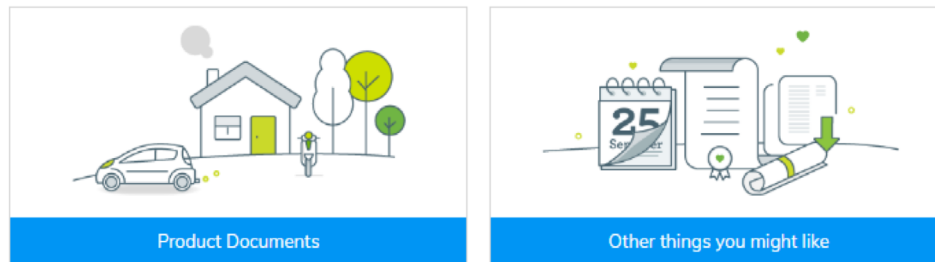


### Product Documents

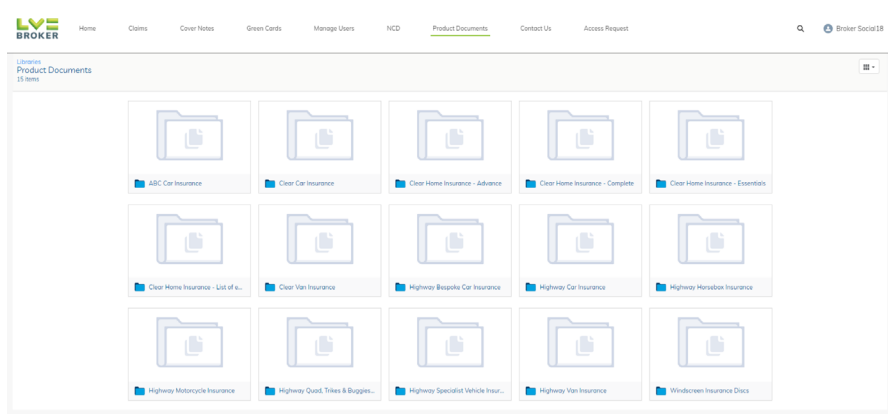
Welcome to your Product Documents area.

Here you can view and download PDF copies of our product documents.  
Just select the correct document and click 'Download' - it's as easy as that!

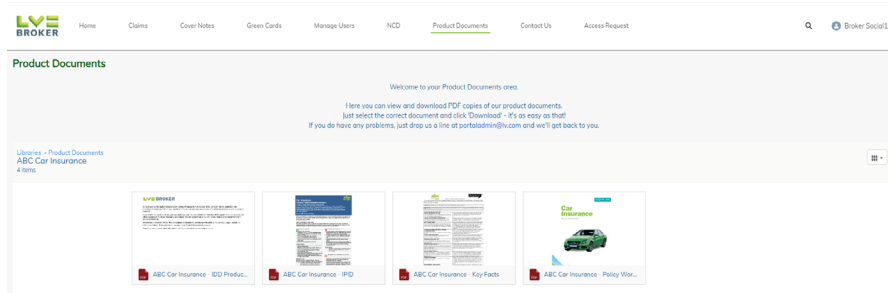
7.1 Select the area you'd like to view



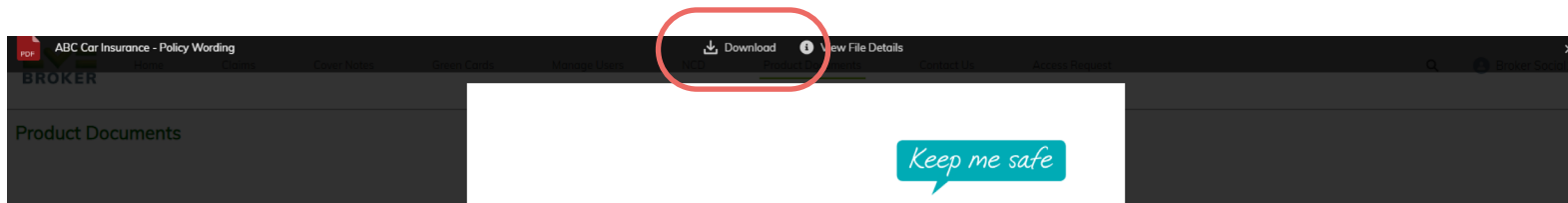
## 7.2 In **Product Documents** select the product you require



## 7.3 Click on the document you require to bring up a preview



## 7.4 **Download** the document using the panel at the top of the screen





## 7.5 Should you require **hard copies** there will be a link at the bottom of the page



Should your customer require a hard copy of a policy wording please click here to fill out the order request form.

## 7.6 Enter the amount of copies you require and click **Next**

### Printed Product Documents Order

We passionately believe you can help us save millions of sheets of paper by simply promoting electronic documents with your customers. They're quick to send, quick to search and far greener for the environment.

If e-Docs are do not meet your customer needs however, please enter the print quantity required and submit your order justification when prompted. Please note that your order justification needs to validate exactly why you need hard copies instead of simply using the greener choice of e-Docs.

Orders will be reviewed within 2 working days and you'll receive an email notification when complete.

For any queries please contact [portaladmin@lv.com](mailto:portaladmin@lv.com)

Name: Broker Social18

Account: Swinton Group Ltd (Manchester, M1 6LT)

Address: 2nd Floor, , M1 6LT, United Kingdom, Bridgewater House, 58-60 Whitworth Street

Printed documents will only be sent to the address shown here

If this is incorrect please email [lvbrokeragency@lv.com](mailto:lvbrokeragency@lv.com) to update our records before placing your order.

Name	Reference	Quantity	Limit
Available for print		<input type="text" value="0"/>	20

NEW top level folder

Other things you might like

Name	Reference	Quantity	Limit
Desk Calendar - Please click the link at the bottom of this page to order	24939-2018	<input type="text" value="0"/>	5
Desk Calendar - Please click the link at the bottom of this page to order	24939-2018	<input type="text" value="0"/>	5
Wall Planner - Please click the link at the bottom of this page to order	2019	<input type="text" value="0"/>	5
Wall Planner - Please click the link at the bottom of this page to order	2019	<input type="text" value="0"/>	5



7.7 A box will appear asking you to enter your rationale for the order, once it's filled in click **Submit**

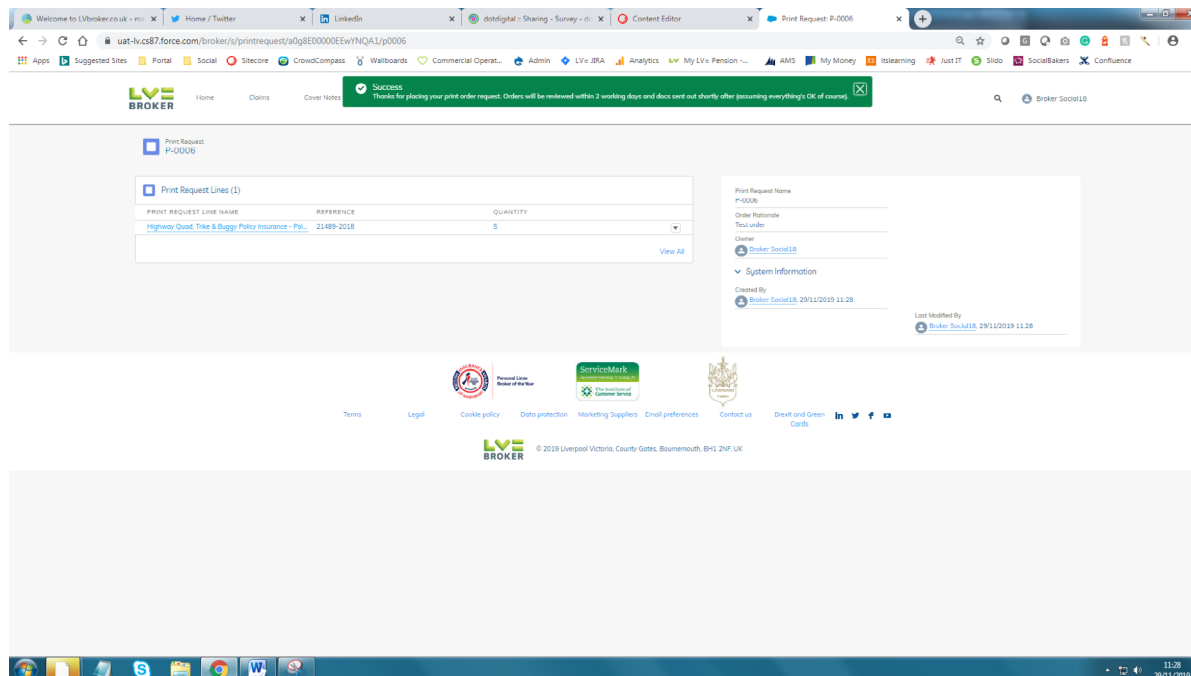
Don't forget you have a range of ways to access documents instead of ordering hard copies. Together we can save millions of sheets of paper by choosing electronic documents through the e-Docs store.

**Still need to order hard copies?**  
You'll need to justify why you need the hard copies for each product. Where there is a genuine need we will of course look to approve your request, however justifications such as 'we always give a hard copy' will be declined.

Please enter your order rationale below: \*

[Back](#) [Submit](#)

7.8 A copy of your order will be displayed on the screen



The screenshot shows a web browser window with the LVE Broker portal. A green success message at the top states: "Success! Thanks for placing your print order request. Orders will be reviewed within 2 working days and docs sent out shortly after (assuming everything's OK of course)." Below this, the page displays details for a print request named "P-0006".

PRINT REQUEST LINE NAME	REFERENCE	QUANTITY
Highway Quad, Title & Buggy Policy Insurance - Pol...	21489-2018	5

On the right side, the "Print Request Name" is confirmed as "P-0006". The "Order Rationale" is listed as "Test order". The "System Information" section shows the request was created by "Broker Social18" on 29/11/2019 at 11:28 and last modified by the same user at the same time.

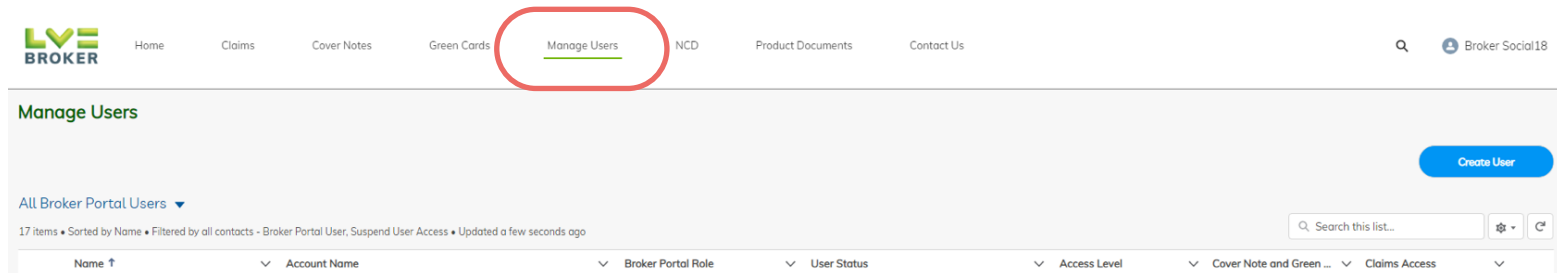
The footer of the page includes various links (Terms, Legal, Cookie policy, Data protection, Marketing Suppliers, Email preferences, Contact us, Deviant and Green Cards) and the LVE Broker logo with the address: "© 2019 Liverpool Victoria, County Gates, Bournemouth, BH1 2NF, UK".



# Manage users

## Viewing your claims

8 Go to Home > **Manage Users**



**Manage Users**

[Create User](#)

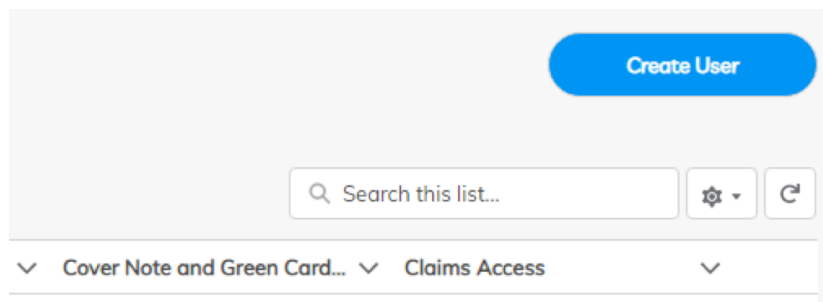
All Broker Portal Users ▾

17 items • Sorted by Name • Filtered by all contacts - Broker Portal User, Suspend User Access • Updated a few seconds ago

Q Search this list... ⚙️ ↻

Name ↑	Account Name	Broker Portal Role	User Status	Access Level	Cover Note and Green ...	Claims Access
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8.1 To set up a new user click **Create User**



[Create User](#)

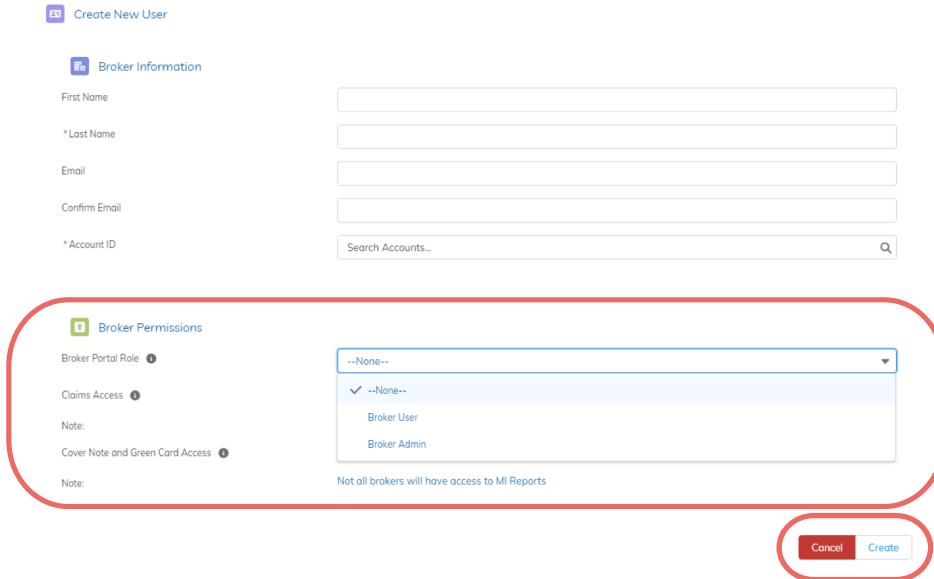
Q Search this list... ⚙️ ↻

Cover Note and Green Card... Claims Access



**Broker User** – has basic access for policy docs and NCD requests

**Broker Admin** – has the same access as a Broker User, but can manage users too



**Create New User**

**Broker Information**

First Name

\* Last Name

Email

Confirm Email

\* Account ID

**Broker Permissions**

Broker Portal Role

Claims Access ☒

Note:

Cover Note and Green Card Access ☐

Note: Not all brokers will have access to MI Reports

## Cover Note and Green Card Access:

- **Totally self-serve**
- **Keep your customers covered whilst abroad with our Green Cards**

## Claims Access:

- **Repair tracking now available for all motor claims**
- **Daily claims feed**

**8.2** Follow the steps through

**8.2.1** You'll need to select whether the user is a Broker User or Broker Admin:



8.3 Once happy then click **Create**. It will then ask you to review after which you can click **Submit**

Email

Confirm Email

\* Account ID

**Broker Permissions**

Broker Portal Role

Claims Access ☒

Note: Just so you know, when adding Claims access it may take 15 mins to show updates whilst some clever stuff happens.

Cover Note and Green Card Access ☒

Note: Not all brokers will have access to MI Reports

[Back](#) [Submit](#)

8.4 You'll then see a summary screen of the user

[Manage Users](#)

**Broker Summary**

Contact **Fletcher Bacon** [+ Follow](#) [Edit](#) [Send \(Re\)activation Link](#)

Title	Account Name	Phone	Email	Contact Owner
	<a href="#">Swinton Group Ltd (Manchester, M1 6LT)</a>		<a href="mailto:fletch@swinton.co.uk">fletch@swinton.co.uk</a>	<a href="#">Broker Social...</a>

Name

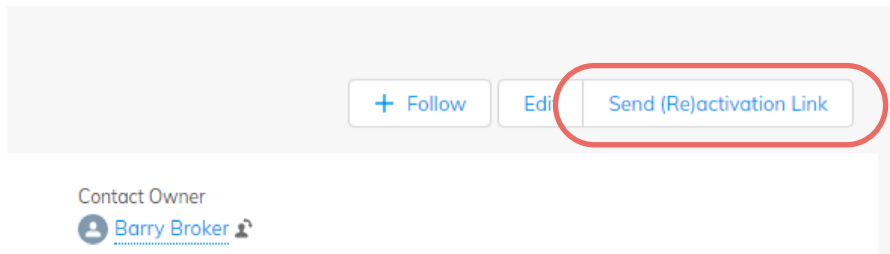
Account Name

Email

✓ User and Permission Information

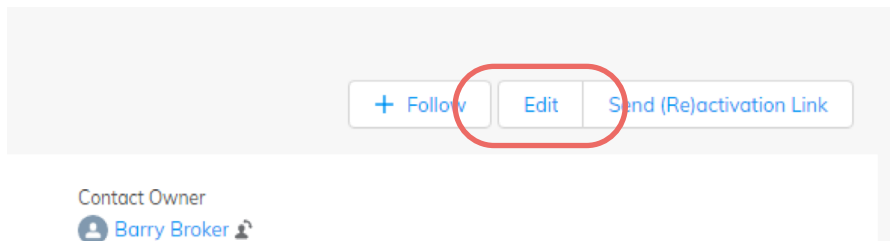


**8.5** If the user hasn't received their activation email you can resend it to them by clicking **Send (Re)activation Link**

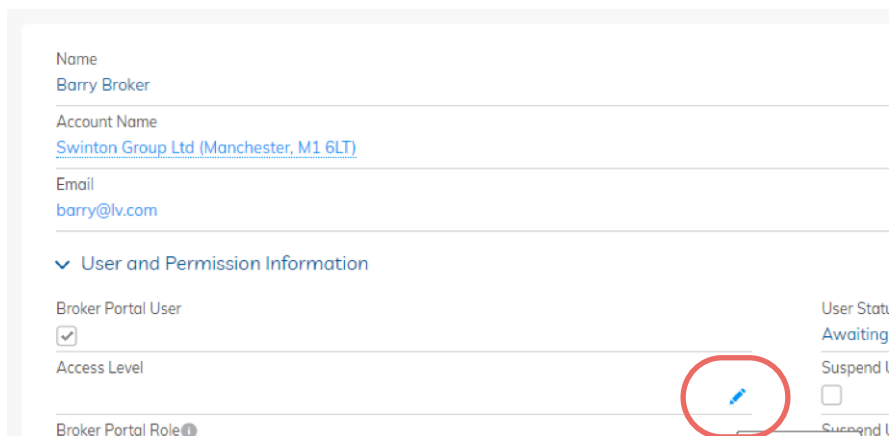


**8.6** There's two ways to edit a user:

**8.6.1** You can click the edit button next to the reactivation link when in the user summary page



**8.6.2** Or you can click the pencil icon in any of the fields shown below



A screenshot of a user edit form. It contains several fields: 'Name' (Barry Broker), 'Account Name' (Swinton Group Ltd (Manchester, M1 6LT)), and 'Email' (barry@lv.com). Below these is a section titled 'User and Permission Information'. In this section, there are fields for 'Broker Portal User' (checked), 'Access Level', and 'Broker Portal Role'. A pencil icon is visible in the 'Access Level' field, which is highlighted with a red circle. To the right of the form, there are labels for 'User Status' (Awaiting), 'Suspend', and 'Suspend'.





**8.6.3** In the edit contact screen, you can edit a user's access levels, what they can access as well as suspending their access, here's the next step

User and Permission Information

Broker Portal User <input checked="" type="checkbox"/>	User Status Awaiting TOU Acceptance
Access Level --None--	Suspend User Access ⓘ <input type="checkbox"/>
*Broker Portal Role ⓘ Broker User	Suspend User Access until <input type="text"/>
Cover Note and Green Card Access ⓘ <input type="checkbox"/>	

**8.7** You can also suspend a user's access in the summary page by clicking the pencil next to **Suspend User Access**

User Status  
Awaiting TOU Acceptance

Suspend User Access

☐

Suspend User Access until



# Contact us



0208 256 6966



[portaladmin@lv.co.uk](mailto:portaladmin@lv.co.uk)