



A guide to:

# Online Account Management



LVbroker.co.uk

 LV= Broker  @LV\_Broker

 @lvbrokersocial

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# Self Registration

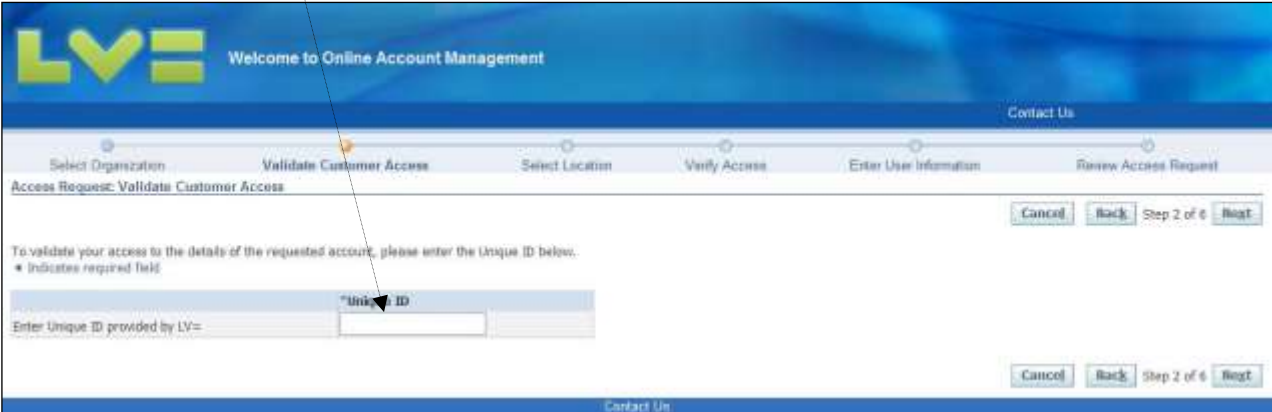
- Select **Register for Online Account Management**



- Enter the **Agency number**, then enter the **email address** you will be using to login.



- Enter the **Unique ID\*** provided by LV=. Please note that if you have three unsuccessful attempts your account will be temporarily locked for 24 hours.



**\*Please note:** This Unique ID would have been provided either in the initial email when requesting set up on Online Account Management or in the email when you requested additional access.

- Click on the **Select** button, then click



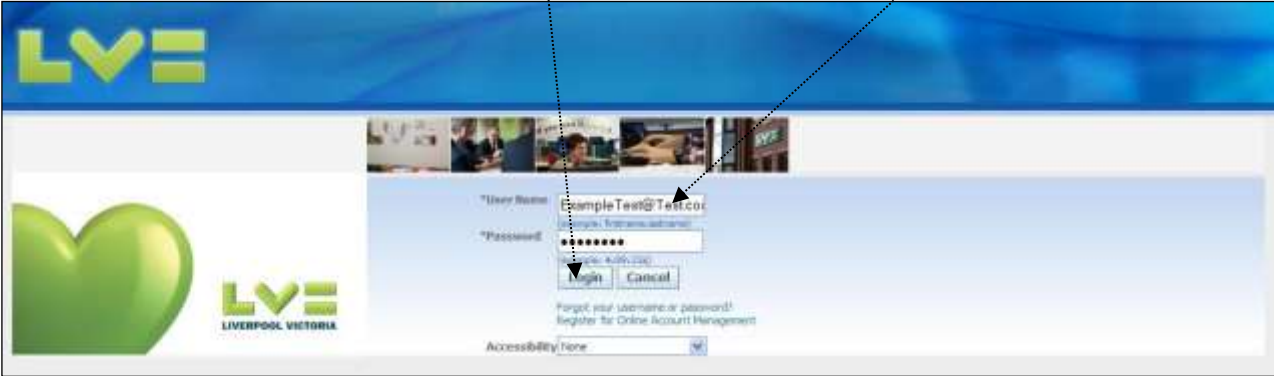
- Fill in the **User Information** and select a **Password**. The Password **must** be 8 or more characters. Once all details are complete, click **Next**.

- Review the **User Details** and **Terms and Conditions** then tick the **box**. Click **Submit** once complete.

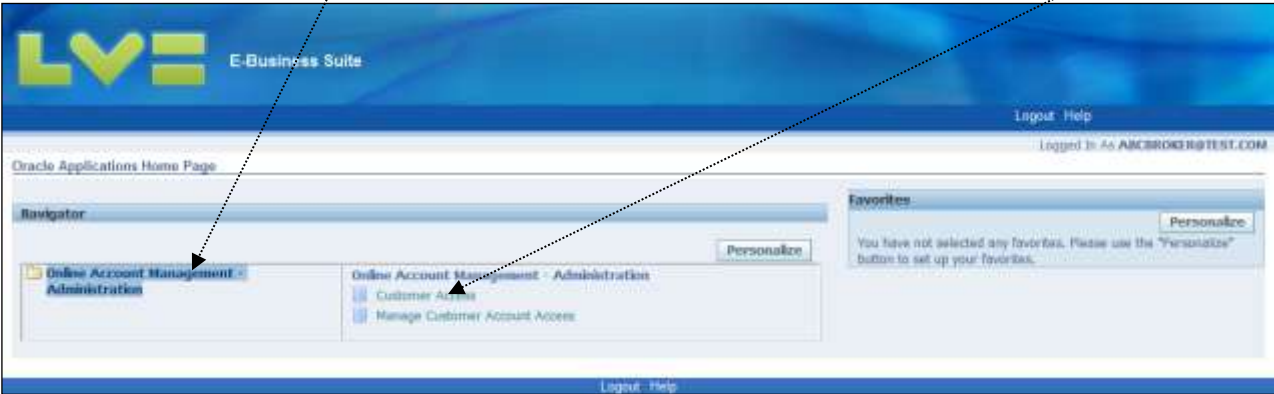
- You are now registered for Online Account Management.

# Accessing Online Account Management

- Using the link provided in the confirmation email enter your **Email address** in User name and your **Password**, then click **Login**



- Select **Online Account Management - Administration**, then click **Customer Access**



**Please note:** If Online Account Management is set up on a single broker, the step below is not applicable.

- Click **Go** while leaving the **%** in the search box and select the relevant account that you wish to manage online by clicking the icon in **Account Summary**



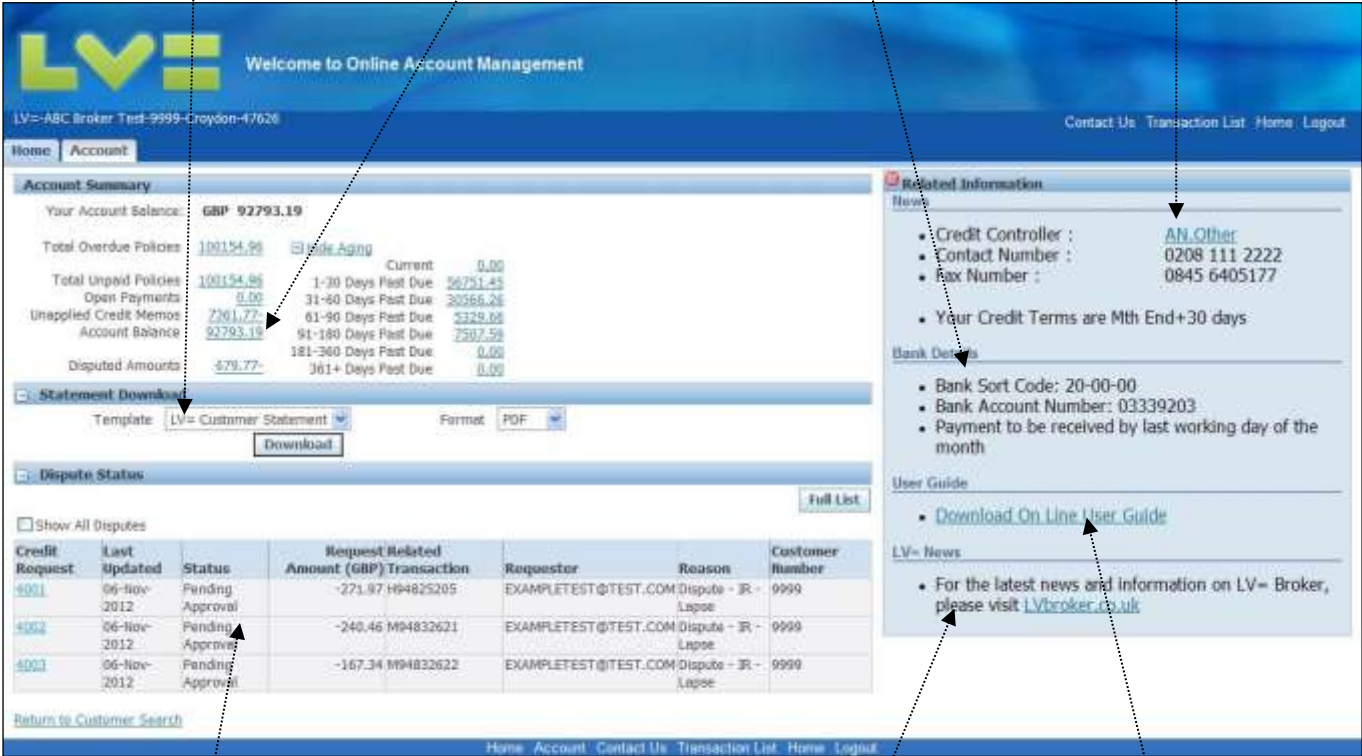
# Home Page – Overview

**Statement:**  
This section allows you to download your statement in multiple formats.

**Account Summary:**  
Summary of debt, showing aging and disputed items. Click **Account Balance** to view all

**Bank Details:**  
Payment bank details for this account.  
**Please note:** These details are different for ABC and Highway.

**Contact:**  
Credit Controller contact details.



**Dispute Status:**  
Shows all outstanding disputed items.

**Quicklinks bar:**  
Handy shortcuts for key information and pages

**LV=News:**  
News and Updates from LV=.

**User Guide:**  
Option to download Online Account Management User Guide.



## Disputing Policies

- Tick the **Select boxes** for the policies to be disputed, or search using the **Policy number** field

Account Details  
Account Balance: 94,319.89

Search  
Status: Overdue Currency: GBP Transaction Type: All Transactions  
Policy Number: [ ]  
Go Clear

Total Transactions: 154 Total Original Amount: 102,215.87 Total Remaining Amount: 102,215.87

Select Receivables: Pay Dispute Add to Transaction List

Select	Policy Number	Broker Reference	Policyholder Type	Transaction Date	Transaction Policy Type	Gross	IPT	Comm	Comm %	Original Amount Outstanding	Balance	Due Date	Type	Status	Dispute Status
<input checked="" type="checkbox"/>	231/09999/00x2804	N/A	Example 2905	New Business 01-Sep-2012	HOME	279.33	21.47	107.36	38	271.57	271.57	30-Oct-2012	Invoice Overdue	Disputed	
<input checked="" type="checkbox"/>	231/09999/00x364	R111681/019	Example 465	New Business 01-Sep-2012	MOTOR	292.98	16.58	52.52	18	246.46	246.46	30-Oct-2012	Invoice Overdue	Disputed	
<input checked="" type="checkbox"/>	231/09999/00x365	R0020576/024	Example 466	New Business 01-Sep-2012	MOTOR	203.88	11.54	36.54	18	167.34	167.34	30-Oct-2012	Invoice Overdue	Disputed	

- Once all the policies are added, click **Dispute**.

**Please note:** You can dispute multiple policies at the same time, as long as the reason for the dispute is the same.

- Select the **Reason for Dispute** from the drop down list and then click **Next**.

Select Dispute Reason

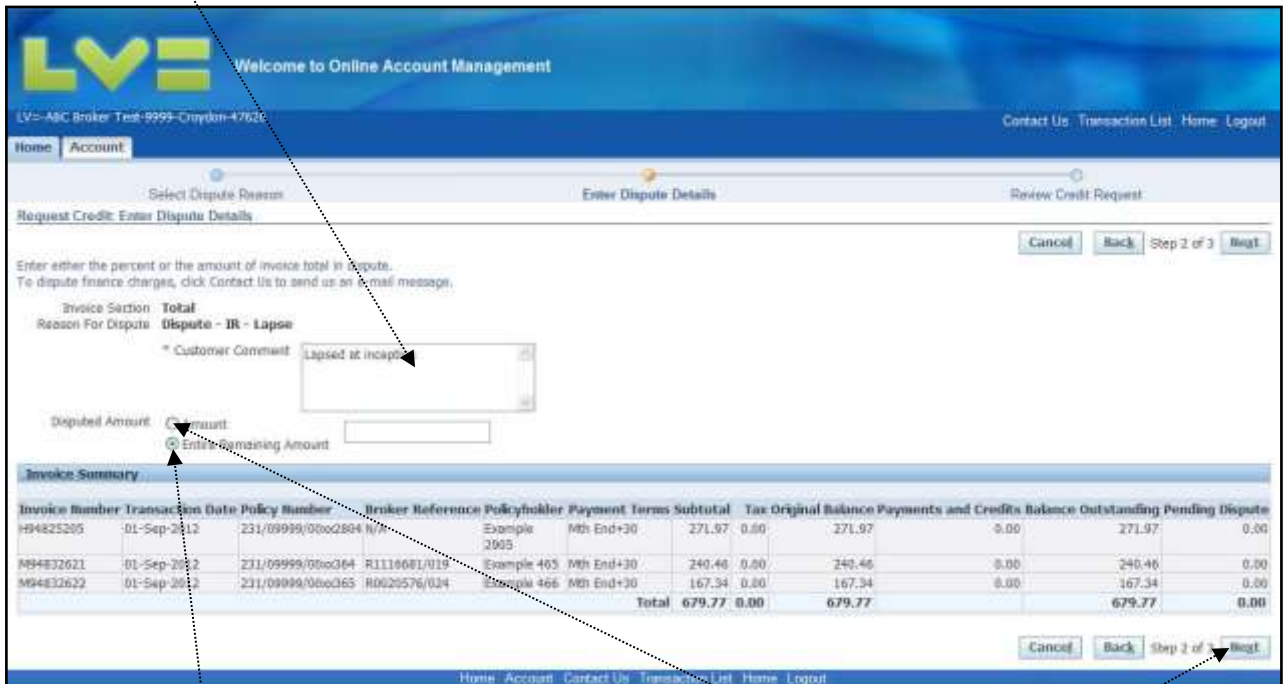
Request Credit: Select Dispute Reason

Reason For Dispute: Dispute - IR - Cancelled

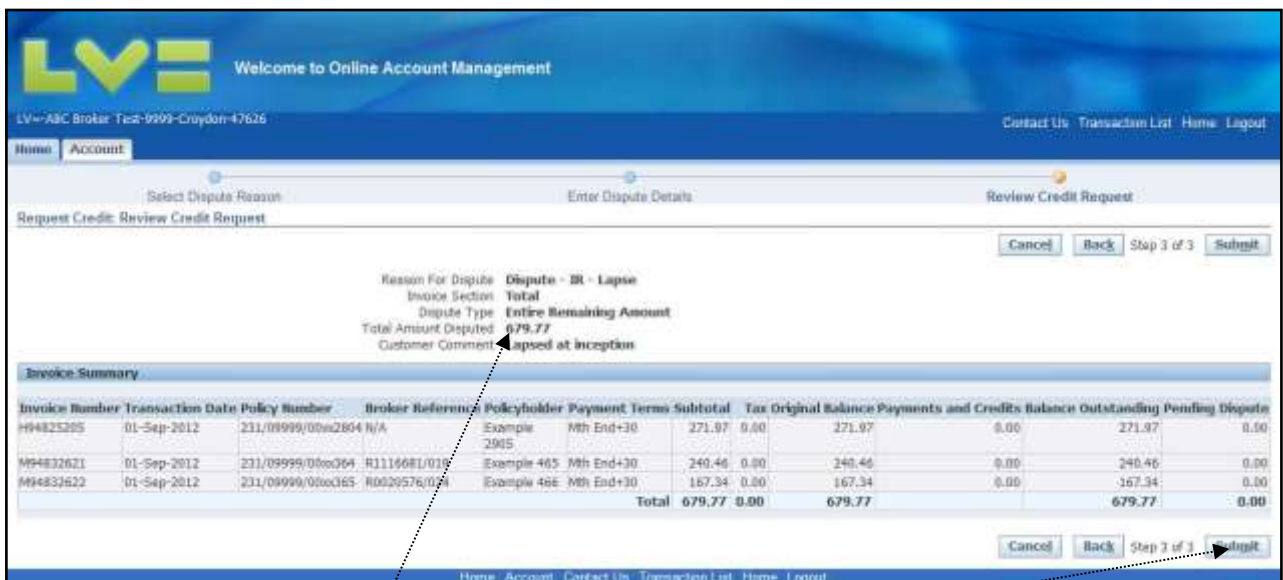
Invoice Number	Transaction Date	Policy Number	Broker Reference	Policyholder Type	Gross	IPT	Comm	Comm %	Original Balance	Payments and Credits	Balance Outstanding	Pending Dispute
H94825205	01-Sep-2012	231/09999/00x2804	N/A	Example 2905	0.00	0.00	271.97	0.00	271.97	0.00	271.97	0.00
M94832021	01-Sep-2012	231/09999/00x364	R111681/019	Example 465	240.46	0.00	240.46	0.00	240.46	0.00	240.46	0.00
M94832622	01-Sep-2012	231/09999/00x365	R0020576/024	Example 466	167.34	0.00	167.34	0.00	167.34	0.00	167.34	0.00
<b>Total</b>					<b>679.77</b>	<b>0.00</b>	<b>679.77</b>	<b>0.00</b>	<b>679.77</b>	<b>0.00</b>	<b>679.77</b>	<b>0.00</b>



- Enter your comments on the next screen to explain in further detail the **Reason for the Dispute**. This is **mandatory** and will ensure swift turn around of queries.



- If disputing part of a policy then you need to select **Amount** and then enter the amount that you wish to dispute in the box provided, then click **Next**. Otherwise simply select **Entire Remaining Amount** and click **Next**.



- Confirm the **Dispute Details**, click **Submit** button.

- Your dispute has now been submitted.

The screenshot shows the LVE Online Account Management interface. At the top left is the LVE logo and the text "Welcome to Online Account Management". On the right, there are links for "Contact Us", "Transaction List", "Home", and "Logout". Below this is a navigation bar with "Home" and "Account" tabs. The main content area features a "Confirmation" message: "This dispute request was submitted for approval on 06-Nov-2012. The requester will receive an email whenever there is a change of status to this dispute. The email will include LVE's response to your dispute. We aim to respond to your dispute as soon as possible, but please note that it may take up to 4 weeks." Below the message is a section titled "Credit Requests" with a sub-header "Total Requests 3". A table lists the requests with columns for Request Number, Related Transaction, Disputed Amount, Currency, Reason, Status, Requestor, and Requested Date. A "Total" row is also present. At the bottom left of the content area is a link "Return to Account Details". The footer of the page contains the same navigation links as the top right.

Request Number	Related Transaction	Disputed Amount	Currency	Reason	Status	Requestor	Requested Date
4001	88483260	-271.97	GBP	Dispute - IR - Lapse	Pending Approval	EXAMPLETEST@TEST.COM	06-Nov-2012
4002	88483261	-240.46	GBP	Dispute - IR - Lapse	Pending Approval	EXAMPLETEST@TEST.COM	06-Nov-2012
4003	88483262	-167.34	GBP	Dispute - IR - Lapse	Pending Approval	EXAMPLETEST@TEST.COM	06-Nov-2012
<b>Total</b>		<b>-679.77</b>					

## Making a Payment - Immediate Payment

- When selecting policies to be paid, you can choose to display all policies on the account or only those within a specific date range. Select the date you wish to view in the 'Due Date To' field and click **Go**.

The screenshot shows the LVE Online Account Management interface. At the top, it says "Welcome to Online Account Management" and "LVE-ABC Broker Test-9999-Croydon-48127". Below this, there are navigation links: "Home", "Account", "My Account", "Account Details", and "Contact Us | Transaction List | Home | Logout".

The "My Account" section shows "Account Balance: 14,163.38". Below this is a "Search" section with various filters:
 

- Status: Open/pending
- Currency: GBP
- Transaction Type: All Transactions
- Policy Number: (empty)
- Transaction Amount From: (empty) To: (empty)
- Transaction Date From: (empty) To: (empty)
- Due Date From: (empty) To: (empty)

 There are "Get" and "Clear" buttons below the search filters. Below the search section, it shows "Total Transactions: 93", "Total Original Amount: 14,193.38", and "Total Remaining Amount: 14,163.38".

Below the search section is a "Select Transactions:" section with buttons for "Pay", "Dispute", and "Add to Transaction List". There are also "Previous" and "Next" buttons with page numbers "1-25".

The main part of the screenshot is a table with the following columns:
 

Select	Policy Number	Broker Reference	Policyholder	Transaction Type	Transaction Date	Policy Type	Gross	IPP Commission	Comm %	Original Amount	Balance Due Outstanding Date	Type	Status	Dispute Status
<input type="checkbox"/>	SHPO000000		Test 16	New Business	29-Sep-2012	Shops Package	275.60	15.60	65.00	25	210.60	210.60	30-Oct-2012	Invoice Overdue Disputed
<input type="checkbox"/>	231/09999/00e2812	N/A	Example 2013	Renewal	10-Sep-2012	HOME	217.00	12.29	61.44	30	155.64	155.64	30-Oct-2012	Invoice Overdue Disputed
<input type="checkbox"/>	231/09999/00e2801	N/A	Example 2952	Renewal	08-Sep-2012	HOME	184.39	10.44	52.19	30	132.20	132.20	30-Oct-2012	Invoice Overdue Disputed

- To select the policies to be paid, you have several options; you can choose to tick the individual **Select boxes**, **Select All Transactions** on the account, or **Select** the transactions from the page displayed.

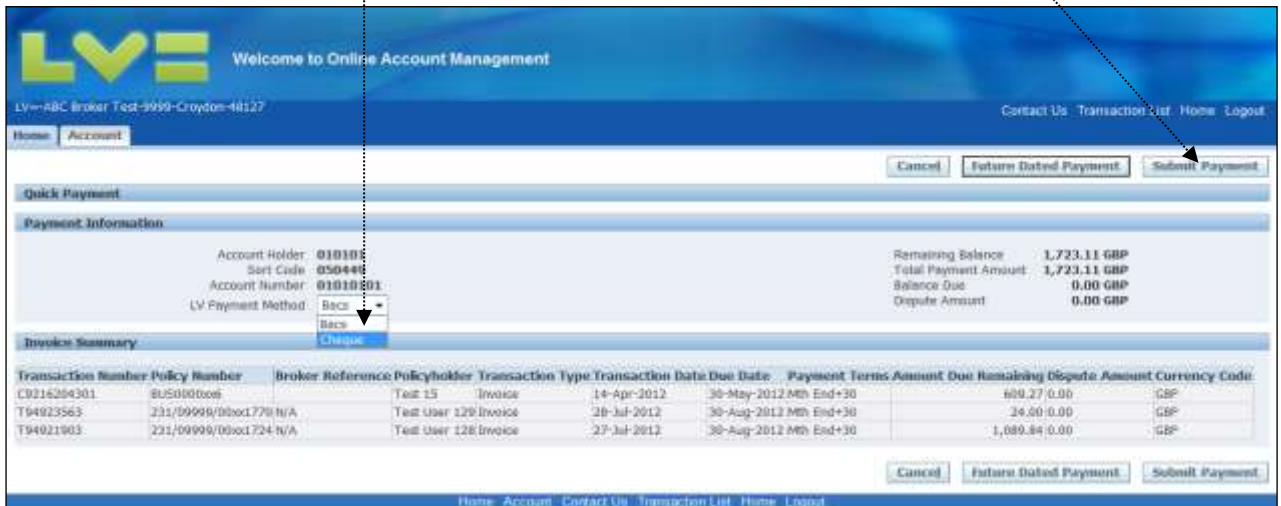
This screenshot is identical to the one above, but with dotted arrows pointing from the "Select" checkboxes in the table to the "Pay" and "Add to Transaction List" buttons in the "Select Transactions:" section.

- When all selections have been made, click **Pay**. If you would like to pay multiple policies, select **Add to Transaction List**.

- If Items have been added to the Transaction List, they will remain ticked on the account screen. Click the link in the top right corner to view the **Transaction List**. On this screen you can choose to **Save Transaction List** and come back to it at a later date. When a Transaction List has been saved, the policies listed will stay in the list until paid or cleared. The running total of all policies in the Transaction List is shown in the bottom left hand corner. Review the policies to be paid, and click **Pay**.



- Select a **Payment Method** from the drop down list and click **Submit Payment**

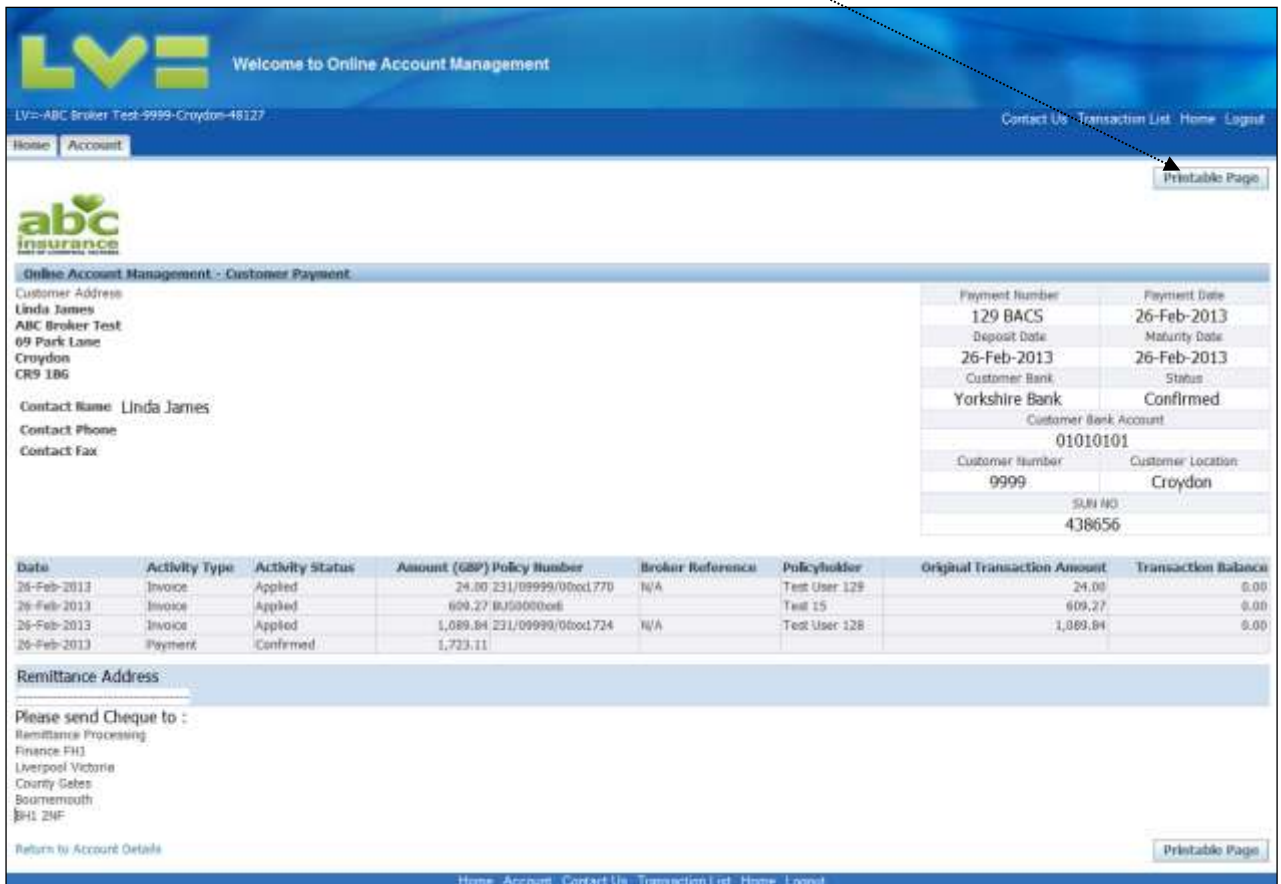


Please note: If you have not signed up for Direct Debit collection, then select your payment method of either **BACS** or **Cheque**. If paying by **cheque**, you are required to complete the **Cheque reference** field with your **Cheque number**.

- Please follow the steps listed for the relevant payment type, and click the **View Payment** button.



- Please click on the **Printable Page** button. This will print a remittance advice that you will need to attach to your **Cheque** when sending payment.



## Making a Payment - Future Dated Payment

- When selecting policies to be paid, you can either choose to display all policies on the account, or only those within a specific date range. To select the date range enter the **Due Date To** you wish to view.

Welcome to Online Account Management

Account Balance: 14,163.38

Total Transactions: 93      Total Original Amount: 14,193.38      Total Remaining Amount: 14,163.38

Select	Policy Number	Broker Reference	Policyholder	Transaction Type	Transaction Date	Policy Type	Gross	IPT Commission	Comm %	Original Amount	Balance Due	Outstanding Date	Type	Status	Dispute
<input type="checkbox"/>	5HF0000000		Test 16	New Business	29-Sep-2012	Shops Package	275.60	15.60	65.00	25	210.60	210.60	30-Oct-2012	Invoice Overdue	Disputed
<input type="checkbox"/>	231/09999/03oc2812	N/A	Example 2913	Renewal	10-Sep-2012	HOME	217.08	12.29	61.44	30	155.84	155.84	30-Oct-2012	Invoice Overdue	Disputed
<input type="checkbox"/>	231/09999/03oc2801	N/A	Example 2902	Renewal	08-Sep-2012	HOME	184.39	10.44	52.19	30	132.20	132.20	30-Oct-2012	Invoice Overdue	Disputed

- To select the policies to be paid, you have several options; you can choose to tick the individual **Select boxes**, **Select All Transactions** on the account, or **Select** the transactions from the page displayed.

Welcome to Online Account Management

Account Balance: 14,163.38

Total Transactions: 93      Total Original Amount: 14,193.38      Total Remaining Amount: 14,163.38

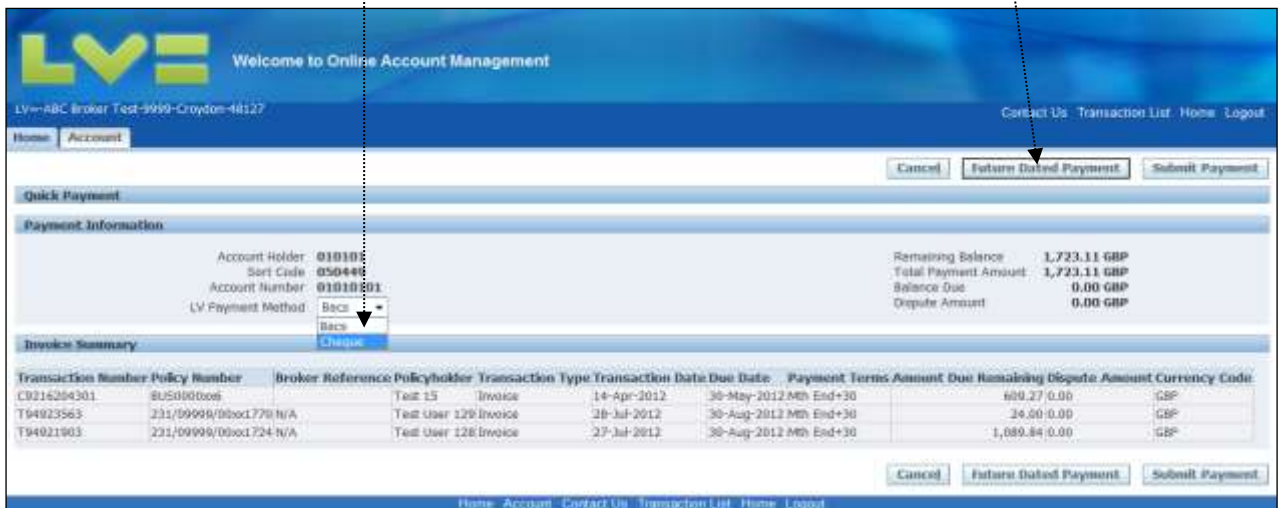
Select	Policy Number	Broker Reference	Policyholder	Transaction Type	Transaction Date	Policy Type	Gross	IPT Commission	Comm %	Original Amount	Balance Due	Outstanding Date	Type	Status	Dispute
<input type="checkbox"/>	5HF0000000		Test 16	New Business	29-Sep-2012	Shops Package	275.60	15.60	65.00	25	210.60	210.60	30-Oct-2012	Invoice Overdue	Disputed
<input type="checkbox"/>	231/09999/03oc2812	N/A	Example 2913	Renewal	10-Sep-2012	HOME	217.08	12.29	61.44	30	155.84	155.84	30-Oct-2012	Invoice Overdue	Disputed
<input type="checkbox"/>	231/09999/03oc2801	N/A	Example 2902	Renewal	08-Sep-2012	HOME	184.39	10.44	52.19	30	132.20	132.20	30-Oct-2012	Invoice Overdue	Disputed

- When all selections have been made, click **Pay**. If you would like to pay multiple policies, select **Add to Transaction List**.

- If Items have been added to the Transaction List, they will remain ticked on the account screen. Click the link in the top right corner to view the **Transaction List**. On this screen you can choose to **Save Transaction List** and come back to it at a later date. When a Transaction List has been saved, the policies listed will stay in the list until paid or cleared. The running total of all policies in the Transaction List is shown in the bottom left hand corner. Review the policies to be paid, and click **Pay**.



- Select a **Payment Method** from the drop down list and click **Future Dated Payment**



**Please note:** If you have not signed up for Direct Debit collection, then select your payment method of either **BACS** or **Cheque**. If paying by **cheque**, you are required to complete the **Cheque reference** field with your **Cheque number**.

**Advanced Payment**

• Indicators required field.

LV Payment Method:

Select Payment Method

Bank Account:

Previously Saved Bank Account

Select Details	Number	IBAN	Currency	Bank Name	Start Date	End Date
<input type="checkbox"/>	<input type="text" value="Show 01010101"/>		GBP	Yorkshire Bank	18-Feb-2013	

Invoice Summary

\* Payment Date:

Transaction Number	Policy Number	Broker Reference	Policyholder	Type	Transaction Date	Due Date	Payment Terms	Amount Due Remaining	Payment Amount	Dispute Amount	Currency Code
C9216204301	BUS0000001		Test 15	Invoice	14-Apr-2012	30-May-2012	Mth End+30	609.27	609.27	0.00	GBP
T94923563	231/09999/000d770	FAA	Test User 128	Invoice	28-Jul-2012	30-Aug-2012	Mth End+30	24.00	24.00	0.00	GBP
T94921903	231/09999/000d724	FAA	Test User 128	Invoice	27-Jul-2012	30-Aug-2012	Mth End+30	1,089.84	1,089.84	0.00	GBP
<input type="button" value="Recalculate"/>								<b>Total</b>	<b>1,723.11</b>		

Remaining Balance: 1,723.11 GBP  
 Total Payment Amount: 1,723.11 GBP  
 Balance Due: 0.00 GBP  
 Dispute Amount: 0.00 GBP

- Amend the **Payment date** and **Payment amount** where applicable. Once changes have been made, select **Recalculate** to update with the changes and then **Submit Payment**.
- Please follow the steps listed for the relevant payment type, and click the **View Payment** button.

**Confirmation**

We have received payment 129 and applied it against the policies you selected.

**BACS Payment Customers:** Please click on the View Payment button and print the remittance and store for your records.

**CHEQUE Payment Customers:** Please click on the View Payment button and print the remittance. This printout should be attached with your returned cheque.

**DIRECT DEBIT Customers:** The payment notification is provided when you click the View Payment button. This is for information purposes only and shows the amount due which will be collected from your bank account by Direct Debit. The payment notification screen provides you with the notice of the date and amount of collection and serves as 3 days notice prior to the collection of the Direct Debit which you have authorised.

**PLEASE NOTE:** If funds are not received within 3 working days of your payment date, the receipt will be reversed and the policies will re-appear on your account.



- Please click on the **Printable Page** button. This will print a remittance advice that you will need to attach to your **Cheque** when sending payment.

The screenshot displays the 'Online Account Management - Customer Payment' page. At the top, there is a navigation bar with 'Home' and 'Account' tabs. A 'Printable Page' button is located in the top right corner, with a dotted arrow pointing to it from the text above. The main content area includes the 'abc insurance' logo and the following information:

**Customer Address:**  
Linda James  
ABC Broker Test  
09 Park Lane  
Croydon  
CR9 1BG

**Contact Name:** Linda James  
**Contact Phone:**  
**Contact Fax:**

Payment Number	Payment Date
129 BACS	26-Feb-2013
Deposit Date	Maturity Date
26-Feb-2013	26-Feb-2013
Customer Bank	Status
Yorkshire Bank	Confirmed

**Customer Bank Account:**  
01010101

Customer Number	Customer Location
9999	Croydon

**Sub ID:**  
438656

Date	Activity Type	Activity Status	Amount (GBP)	Policy Number	Broker Reference	Policyholder	Original Transaction Amount	Transaction Balance
26-Feb-2013	Invoice	Applied	24.00	231/09999/0focd1770	N/A	Test User 129	24.00	0.00
26-Feb-2013	Invoice	Applied	609.27	BU50000000		Test 15	609.27	0.00
26-Feb-2013	Invoice	Applied	1,089.84	231/09999/0focd1724	N/A	Test User 128	1,089.84	0.00
26-Feb-2013	Payment	Confirmed	1,723.11					

**Remittance Address:**

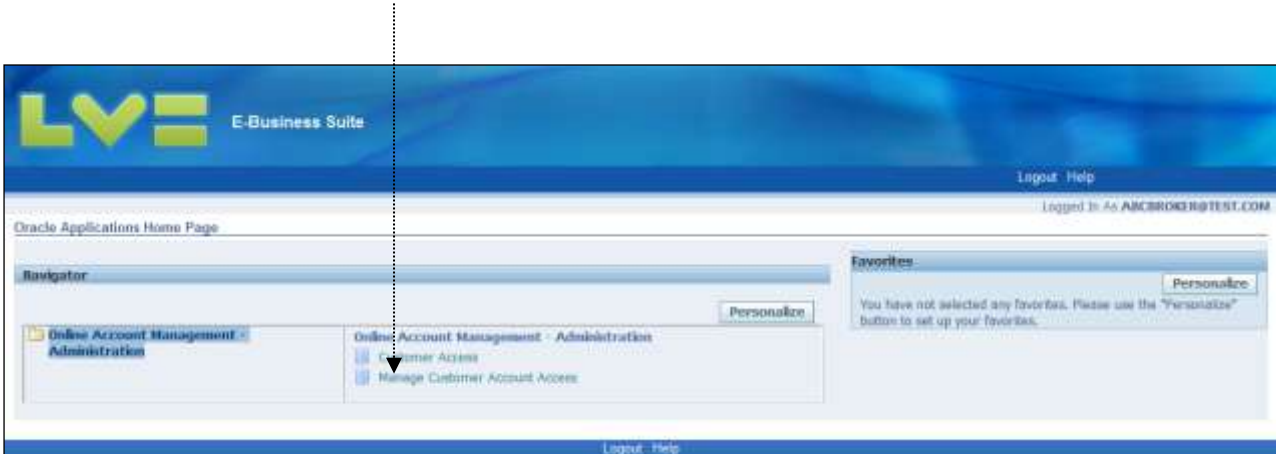
Please send Cheque to :  
Remittance Processing  
Finance FHJ  
Liverpool Victoria  
County Gates  
Bournemouth  
BH1 2NF

Return to Account Details

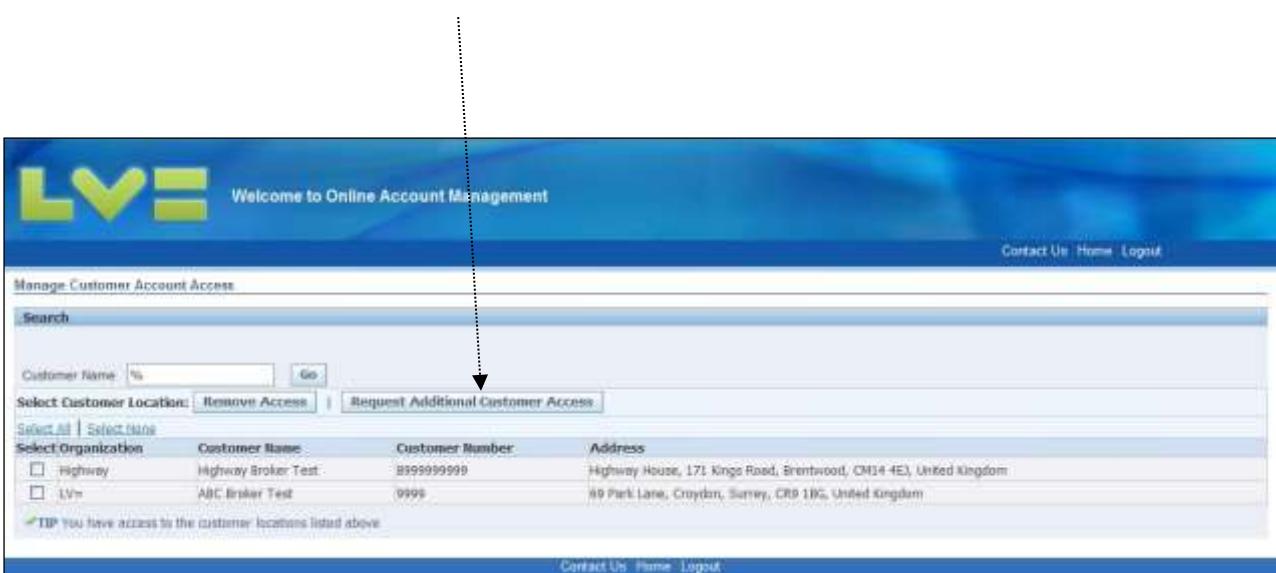
Navigation: Home Account Contact Us Transaction List Home Logout

# Adding Additional Accounts

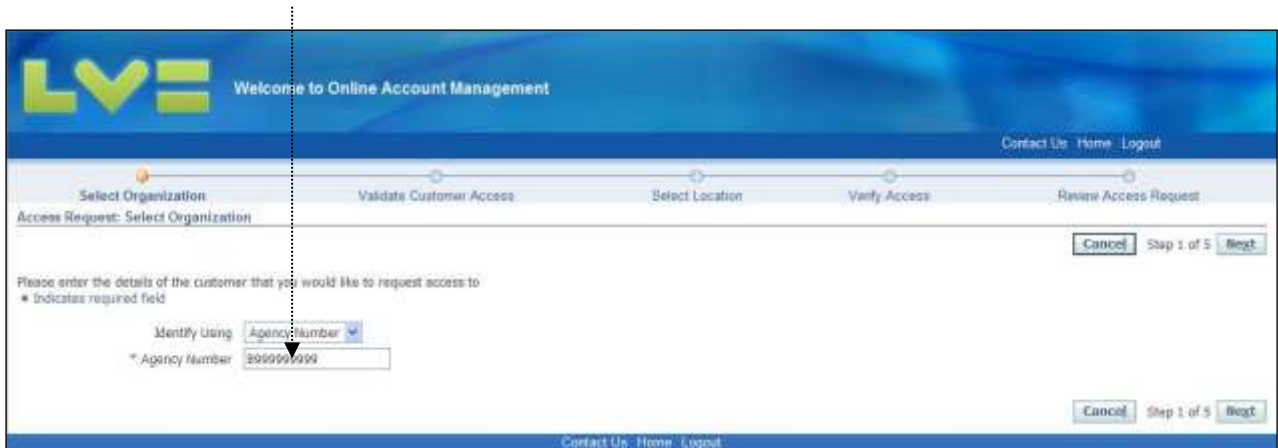
- Select **Manage Customer Account Access**.



- Select the **Request Additional Customer Access** button.

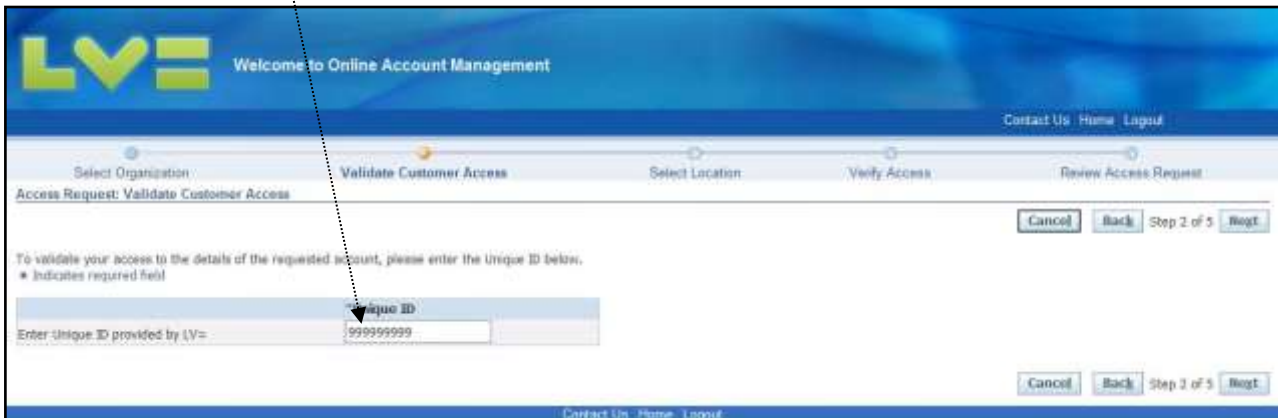


- Enter the **Agency number** that you want to have access to online.



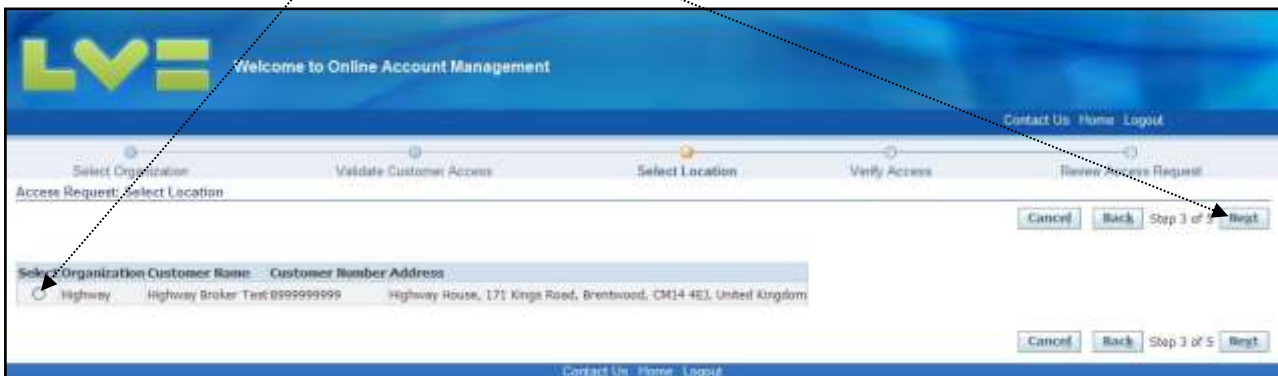
\*Please note: This agency number can be for either ABC or Highway.

- Enter the **Unique ID** provided by LV=. Please note that if you have three unsuccessful attempts your account will be temporarily locked for 24 hours.

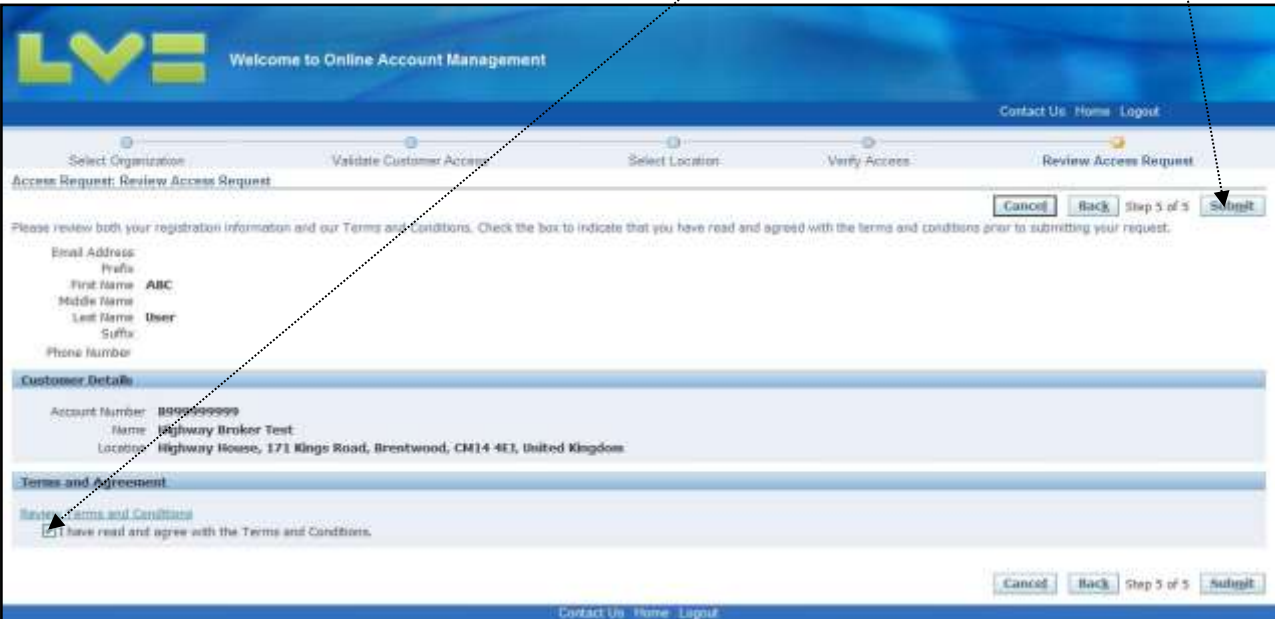


\*Please note: This Unique ID would have been provided either in the initial email when requesting set up on Online Account Management or in the email when you requested additional access.

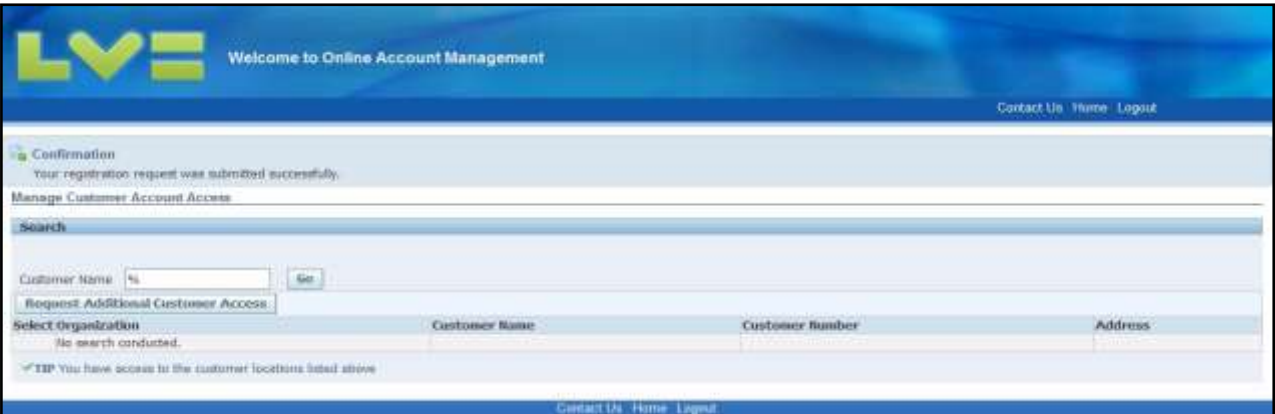
- Click on the **Select** button, then click **Next**.



- Review the **Terms and Conditions** and tick the **box** once complete, then click **Submit**.



- You will now have access to the additional agency when logging in.



## Viewing Disputed Policies

- On the **Home** page click on the **+** symbol next to **Dispute Status**. This displays all outstanding disputed items.

The screenshot shows the 'Dispute Status' section of the account management interface. A table lists three disputed items with columns for Credit Request, Last Updated, Status, Request Related Amount (£889) Transaction, Requester, Reason, and Customer Number.

Credit Request	Last Updated	Status	Request Related Amount (£889) Transaction	Requester	Reason	Customer Number
4001	06-Nov-2012	Pending Approval	-271.87 M94825205	EXAMPLETEST@TEST.COM	Dispute - IR - Lapse	9999
4002	06-Nov-2012	Pending Approval	-248.46 M94832621	EXAMPLETEST@TEST.COM	Dispute - IR - Lapse	9999
4003	06-Nov-2012	Pending Approval	-167.34 M94832622	EXAMPLETEST@TEST.COM	Dispute - IR - Lapse	9999

## Downloading a Statement

- On the **Home** page click on the **+** symbol next to **Statement Download**. Select the statement **Format** you require and click **Download**.

The screenshot shows the 'Statement Download' section of the account management interface. A dropdown menu for 'Format' is open, showing options: PDF, HTML, RTF, and PDF. A 'Download' button is visible below the dropdown.

## Viewing Payments

- On the **Account** page select **Paid** from the Status drop down list and **Payments** from the Transaction Type drop down list. Once selected, click **Go**.

The screenshot shows the 'Account' page with search filters set to 'Paid' status and 'Payments' transaction type. The 'Go' button is highlighted with a dotted arrow. Below the search filters, a table lists transactions with columns for Policy Number, Broker Reference, Policyholder Type, Transaction Date, Transaction Type, Gross, IPT, Comm, Comm %, Original Amount, Balance Outstanding, Due Date, Type, Status, and Dispute.

Select	Policy Number	Broker Reference	Policyholder Type	Transaction Date	Transaction Type	Gross	IPT	Comm	Comm %	Original Amount	Balance Outstanding	Due Date	Type	Status	Dispute
<input type="checkbox"/>	231/09999/0002479/02COCZ23HQ03	Test User 144	New Business	10-Jul-2012	HOME	247.43	14.01	46.68	20	209.75	209.75	30-Aug-2012	Invoice	Overdue	
<input type="checkbox"/>	231/09999/0002480/02J0X094HQ05	Test User 145	New Business	03-Jul-2012	HOME	235.21	13.31	44.38	20	196.83	196.83	30-Aug-2012	Invoice	Overdue	
<input type="checkbox"/>	231/09999/0002481/02Y0MK16HQ02	Test User 146	New Business	18-Jul-2012	HOME	343.82	19.46	64.87	20	278.95	278.95	30-Aug-2012	Invoice	Overdue	
<input type="checkbox"/>	231/09999/0002486/N/A	Example 299	New Business	31-Jul-2012	HIRE AND REWARD	1,068.77	60.50	100.83	10	967.94	967.94	30-Aug-2012	Invoice	Overdue	

- Select the payment you would like to see details for by clicking on the relevant payment **number**

The screenshot shows the 'Account' page with search filters set to 'Paid' status and 'Payments' transaction type. The 'Go' button is highlighted with a dotted arrow. Below the search filters, a table lists payments with columns for Payment, Status, Transaction Date, Apply Date, Applied to Transaction, Original Amount, and Remaining Amount.

Payment	Status	Transaction Date	Apply Date	Applied to Transaction	Original Amount	Remaining Amount
118	Closed	18-Feb-2013	18-Feb-2013	P9217218196	-268.25	0.00
119	Closed	19-Feb-2013	19-Feb-2013	P917442131	-191.04	0.00
120	Closed	19-Feb-2013	19-Feb-2013	Multiple	-1,820.99	0.00
125	Closed	26-Feb-2013	26-Feb-2013	Multiple	-1,723.11	0.00
130	Closed	27-Feb-2013	27-Feb-2013	Multiple	-2,053.32	0.00
122	Closed	27-Feb-2013	27-Feb-2013	Multiple	-51,745.29	0.00
124	Closed	01-Mar-2013	01-Mar-2013	Multiple	-3,487.79	0.00

- You will then be shown the details of the payment.

The screenshot displays the 'Online Account Management - Customer Payment' page. At the top, the LV= logo and 'Welcome to Online Account Management' are visible. The user's account ID is 'LV=ABC Broker Test-9999-Croydon-48127'. Navigation links include 'Home', 'Account', 'Contact Us', 'Transaction List', and 'Logout'. A 'Printable Page' button is located in the top right.

**Customer Address:**  
 Linda James  
 ABC Broker Test  
 69 Park Lane  
 Croydon  
 CR9 1BG

**Contact Information:**  
 Contact Name: Linda James  
 Contact Phone:  
 Contact Fax:

Payment Number	Payment Date
129 BACS	26-Feb-2013
Deposit Date	Maturity Date
26-Feb-2013	26-Feb-2013
Customer Bank	Status
Yorkshire Bank	Confirmed

**Customer Bank Account:**  
 01010101  
 Customer Number: 9999  
 Customer Location: Croydon  
 SUN NO: 438656

Date	Activity Type	Activity Status	Amount (GBP)	Policy Number	Broker Reference	Policyholder	Original Transaction Amount	Transaction Balance
26-Feb-2013	Invoice	Applied	24.00	231/09999/00001770	N/A	Test User 129	24.00	0.00
26-Feb-2013	Invoice	Applied	609.27	BJ00000006		Test 15	609.27	0.00
26-Feb-2013	Invoice	Applied	1,089.84	231/09999/00001724	N/A	Test User 128	1,089.84	0.00
26-Feb-2013	Payment	Confirmed	1,723.11					

**Remittance Address:**  
 Please send Cheque to :  
 Remittance Processing  
 Finance FHJ  
 Liverpool Victoria  
 County Gates  
 Bournemouth  
 BH1 2HF

Return to Account Details

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