BROKER

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A guide to:

Online Account Management

LVbroker.co.uk

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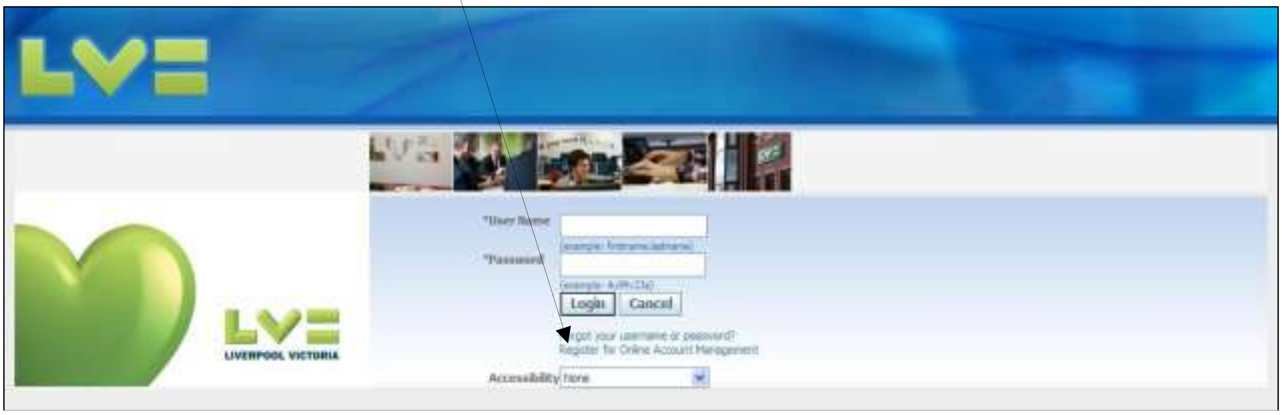
Contents

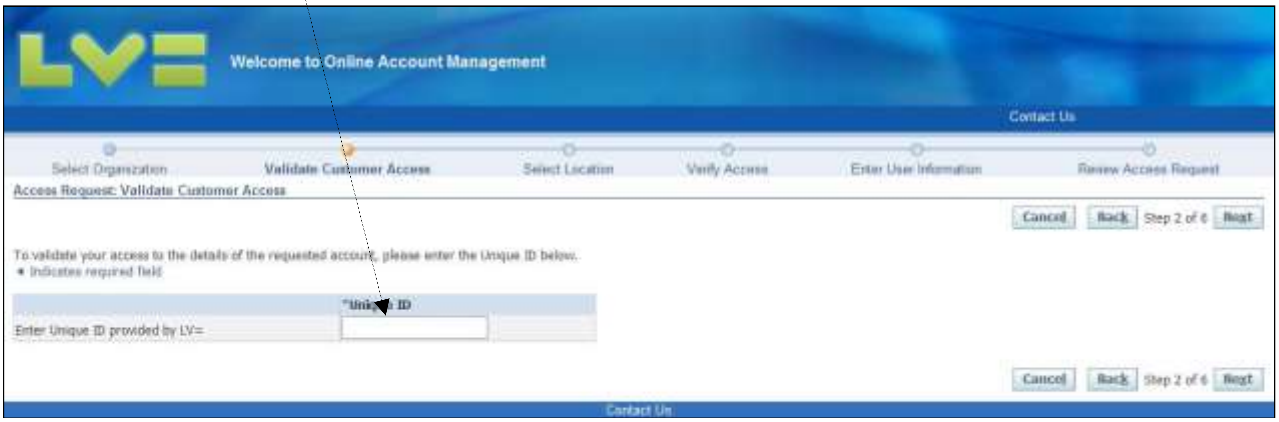
Self Registration

- Select **Register for Online Account Management**



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

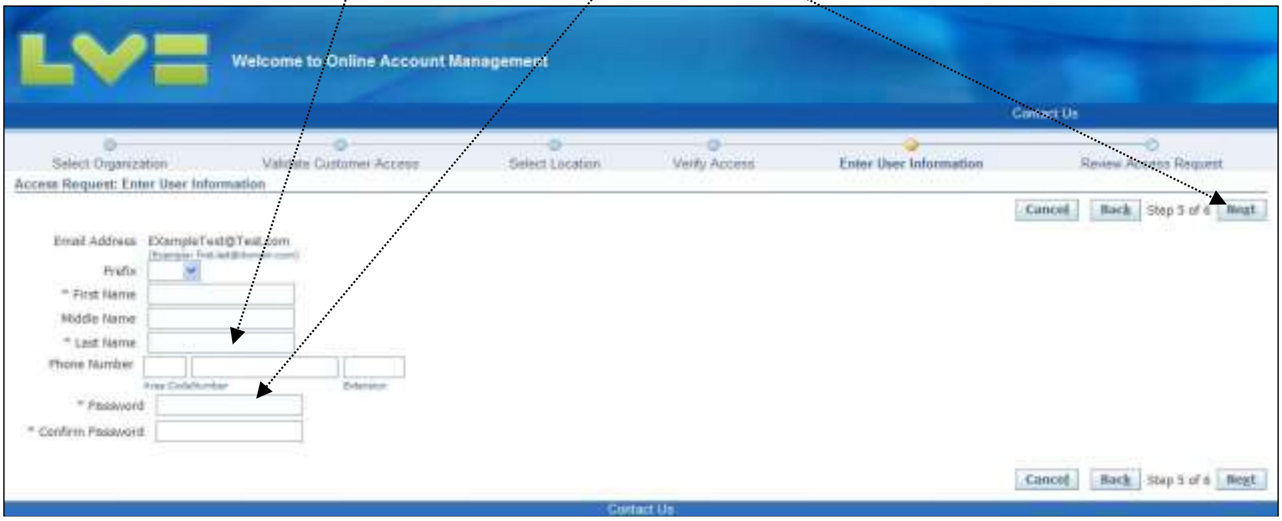
- Enter the **Unique ID*** provided by LV=. Please note that if you have three unsuccessful attempts your account will be temporarily locked for 24 hours.



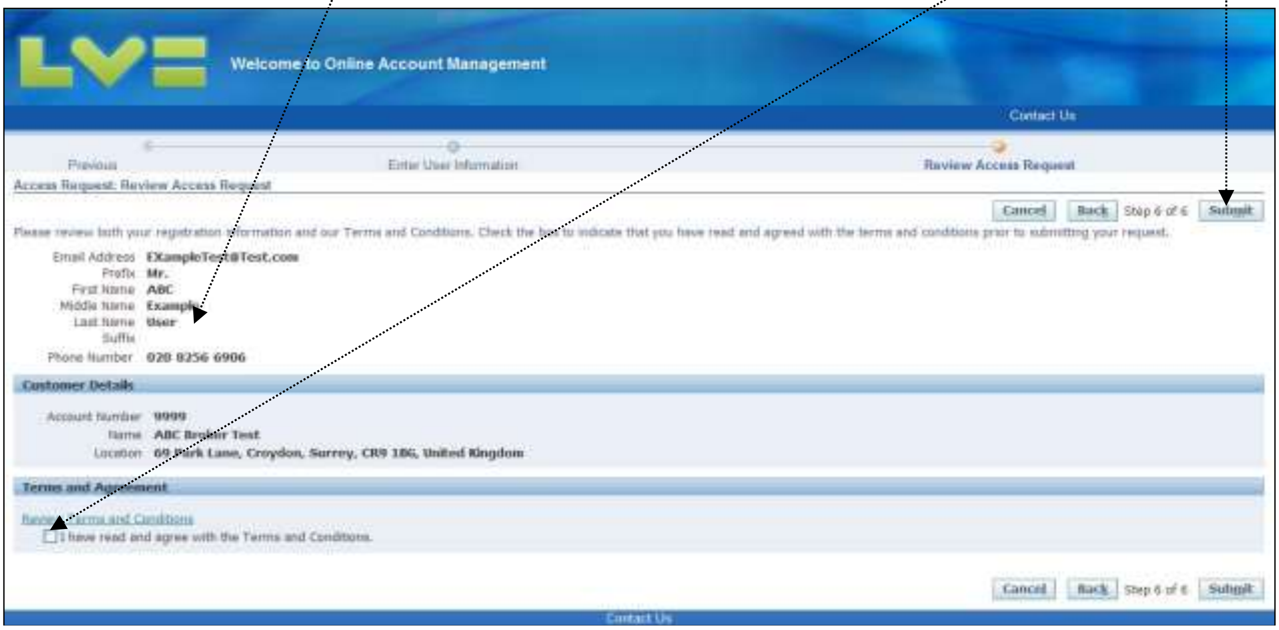
***Please note:** This Unique ID would have been provided either in the initial email when requesting set up on Online Account Management or in the email when you requested additional access.

- 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**.



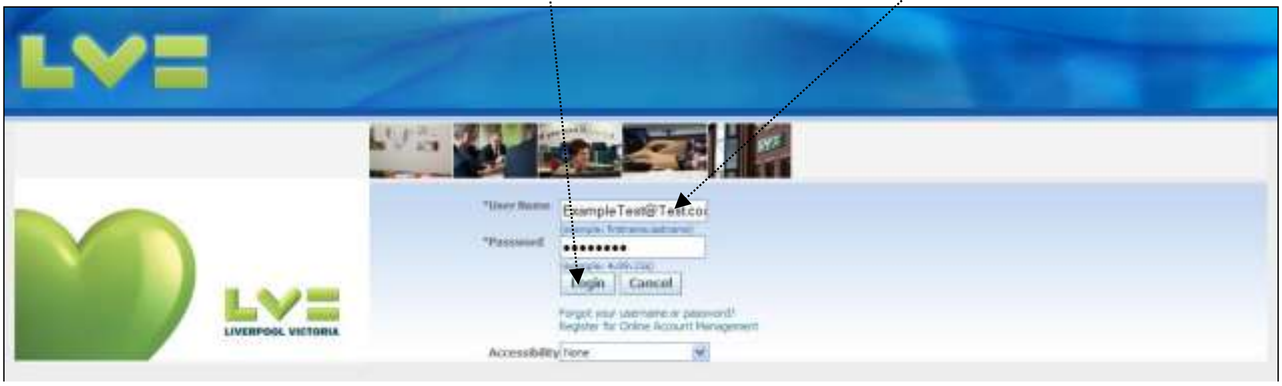
- Review the **User Details** and **Terms and Conditions** then tick the **box**. Click **Submit** once complete.



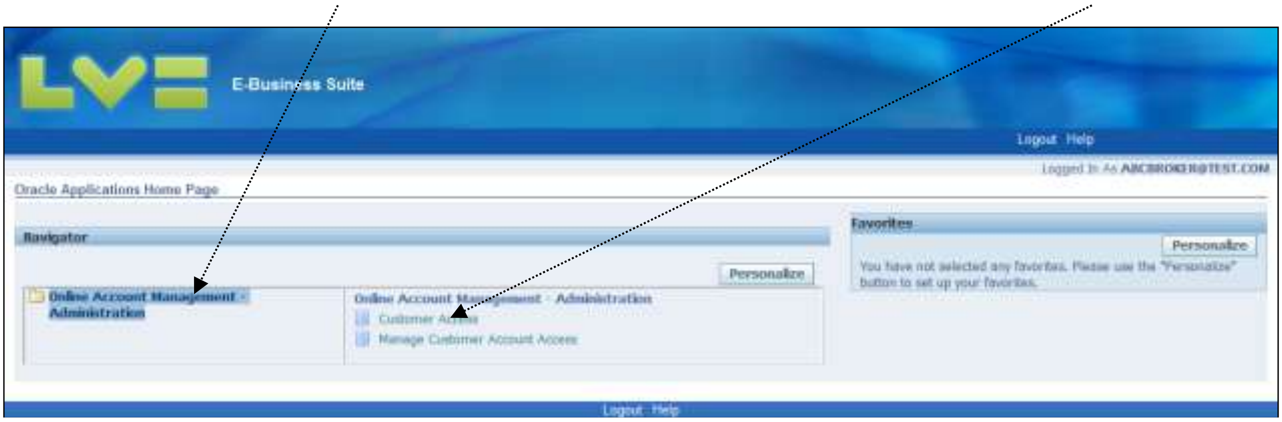
- You are now registered for Online Account Management.

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**

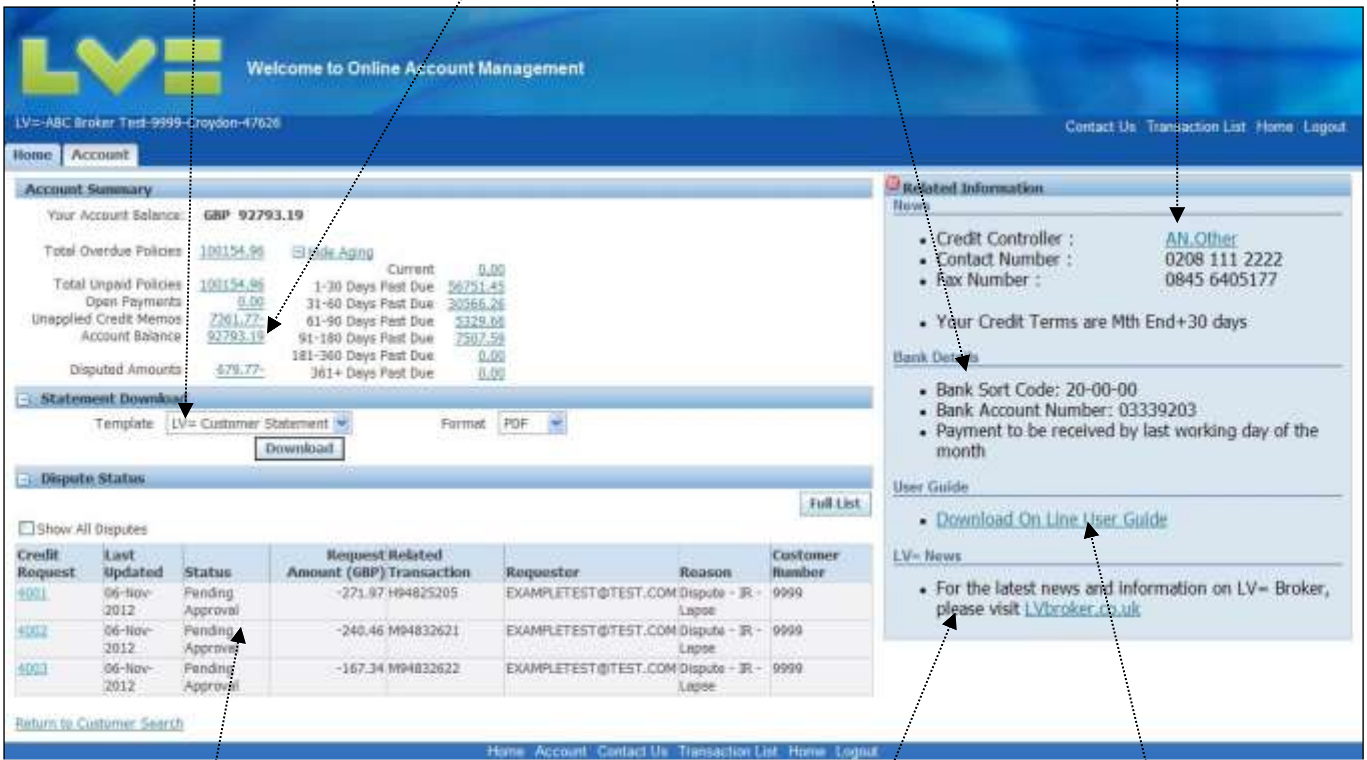
Home Page – Overview

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.

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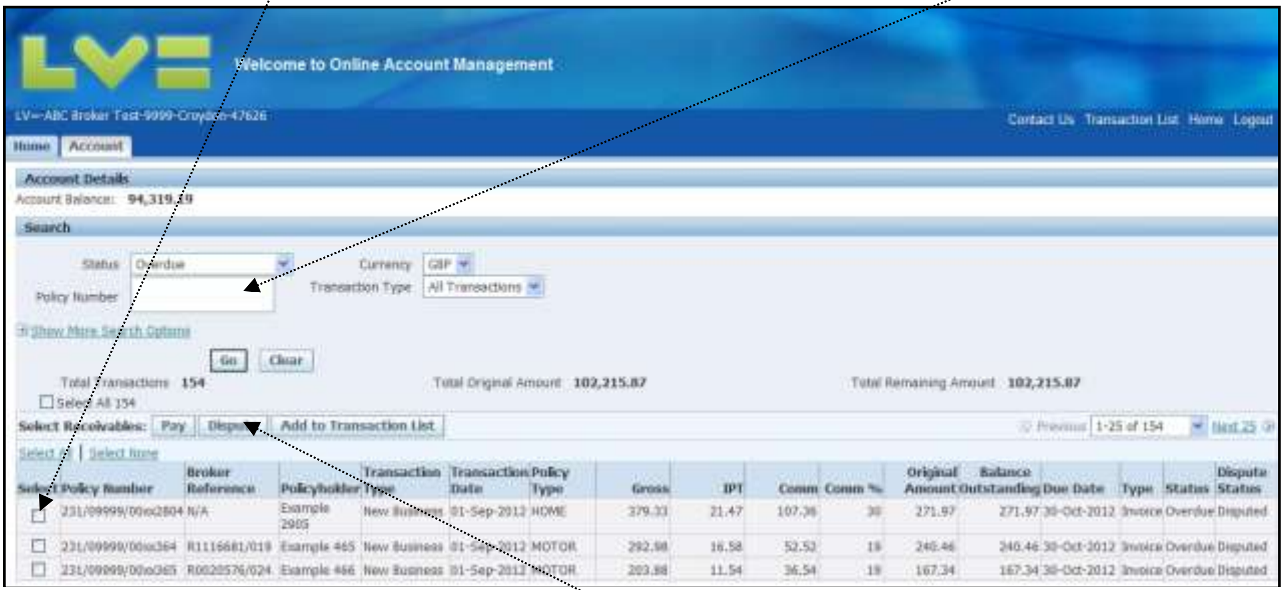
Disputing Policies

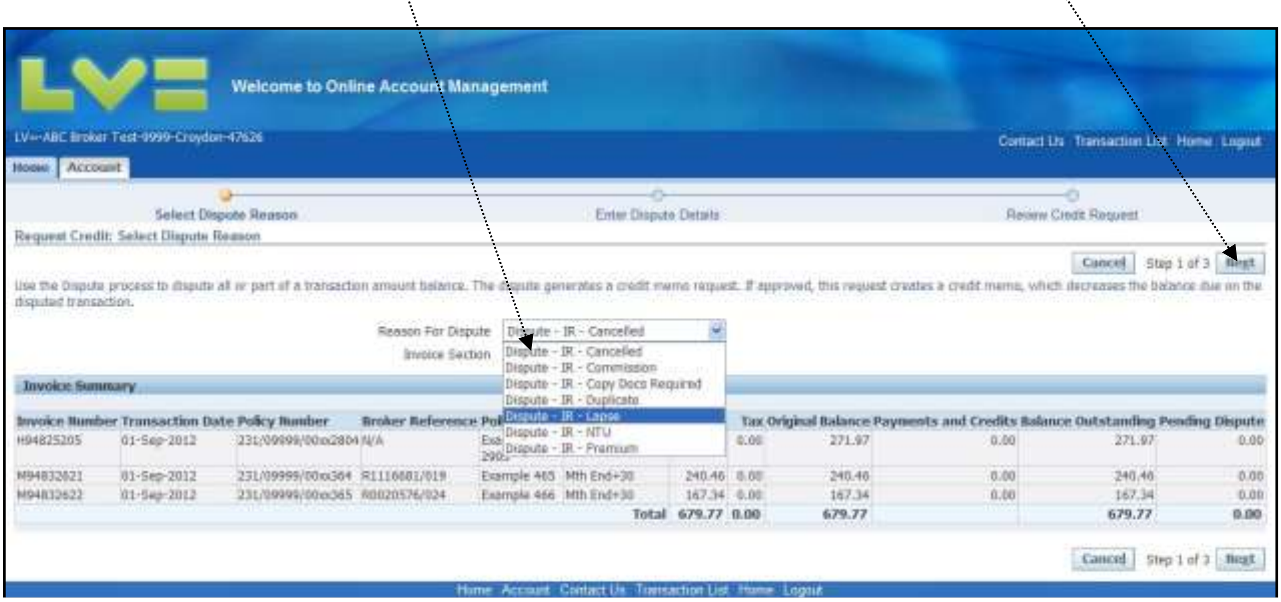
- Tick the **Select boxes** for the policies to be disputed**,** or search using the **Policy number** field



- 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.**



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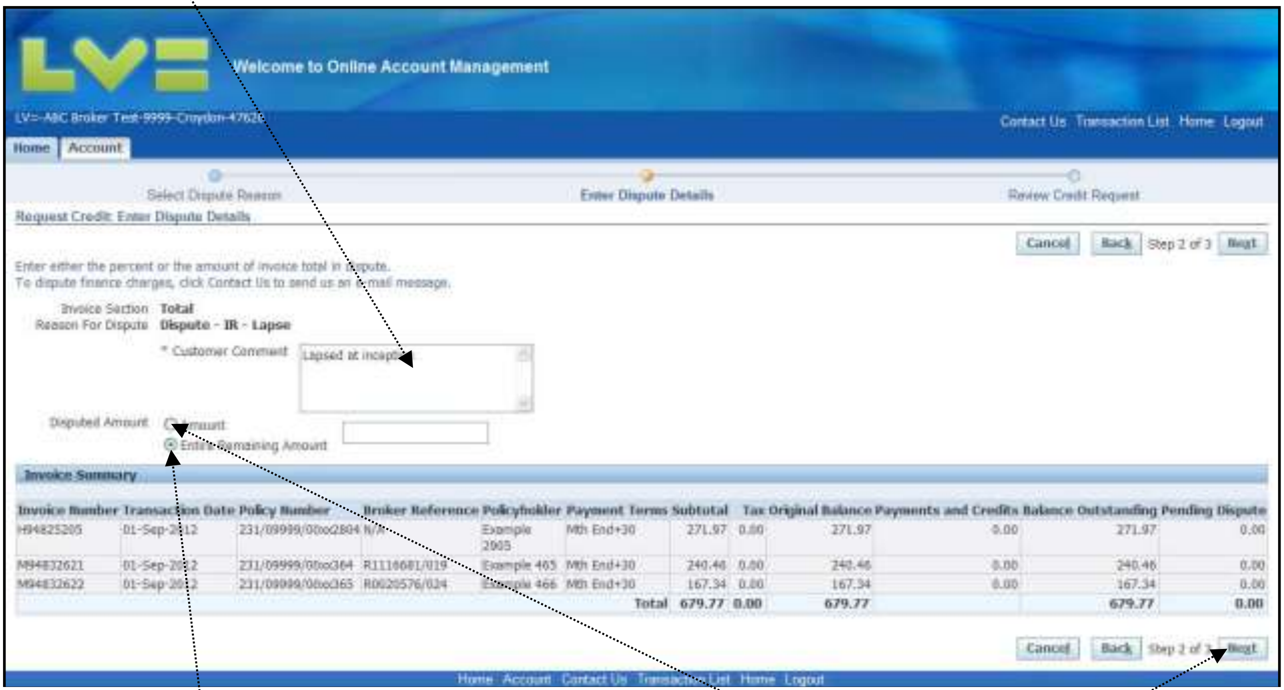
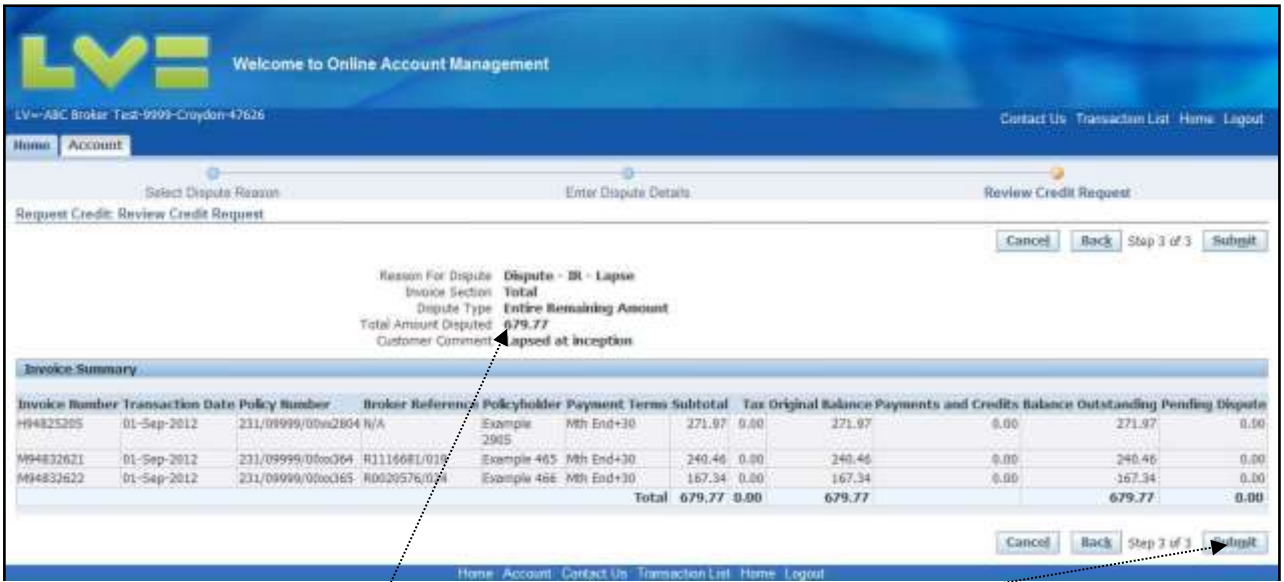
- Enter your comments on the next screen to explain in further detail the **Reason for the Dispute**. This is **mandatory** and will ensure swift turn around of queries.



- 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.**

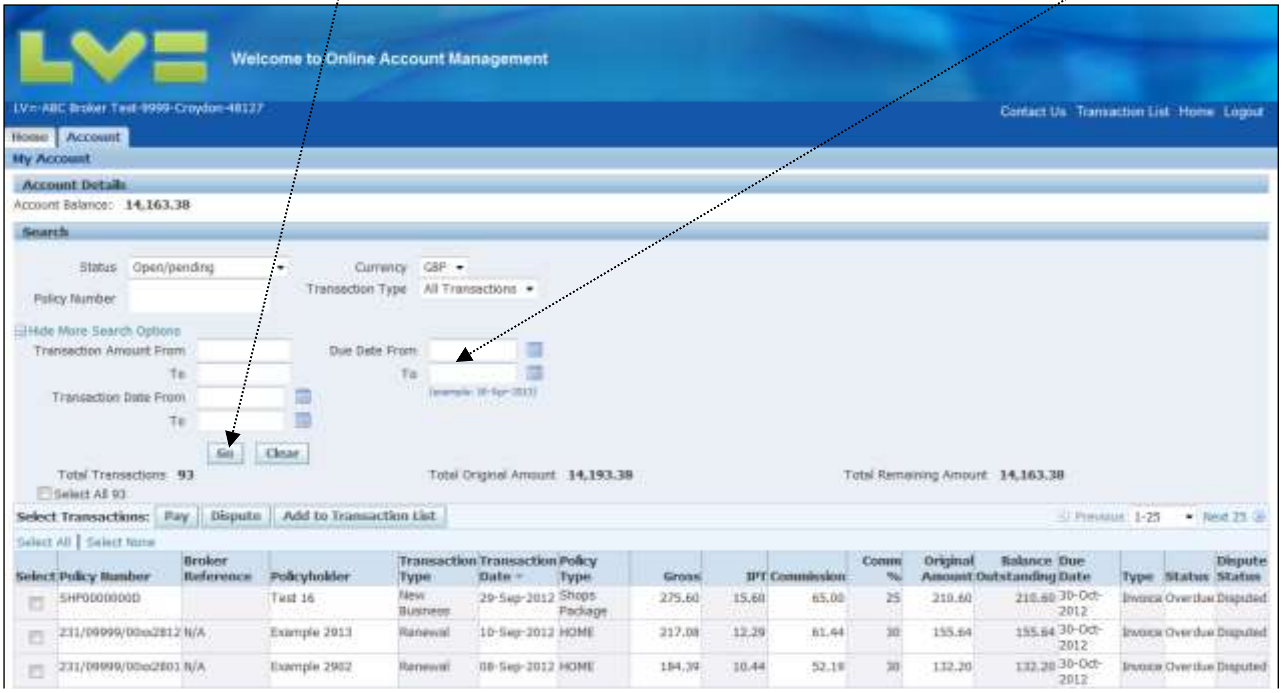


- Confirm the **Dispute Details,** click **Submit** button.

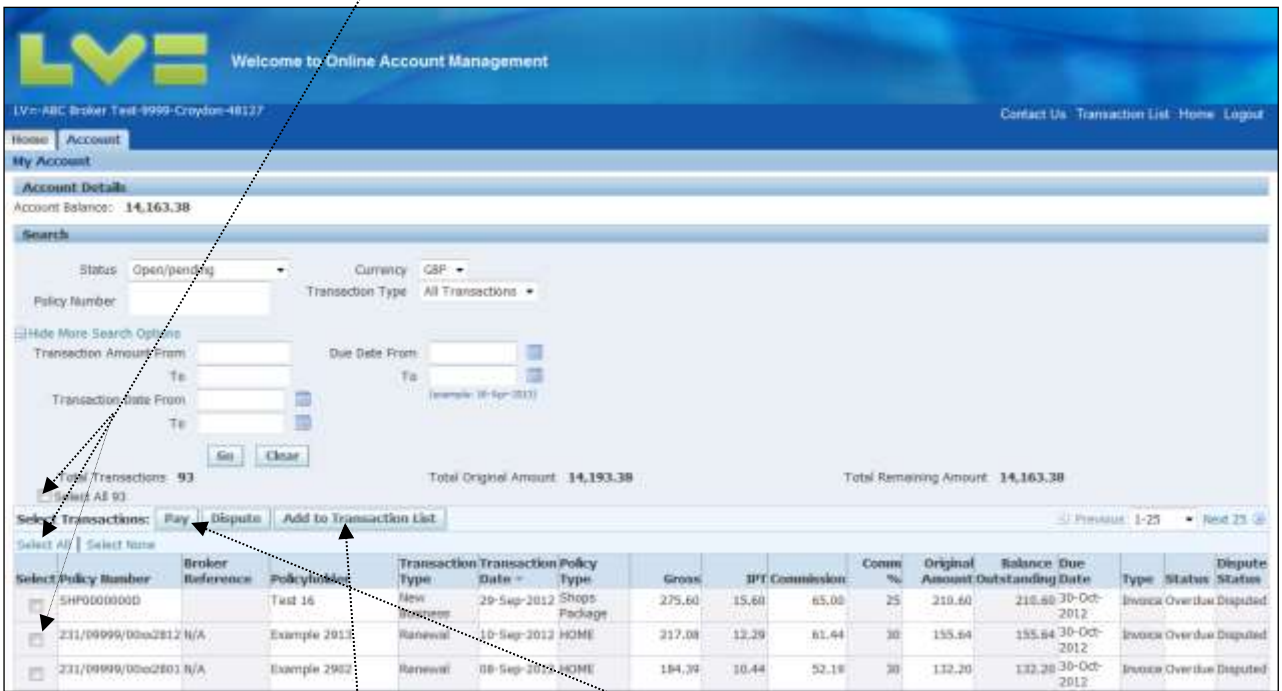
- Your dispute has now been submitted.

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**.



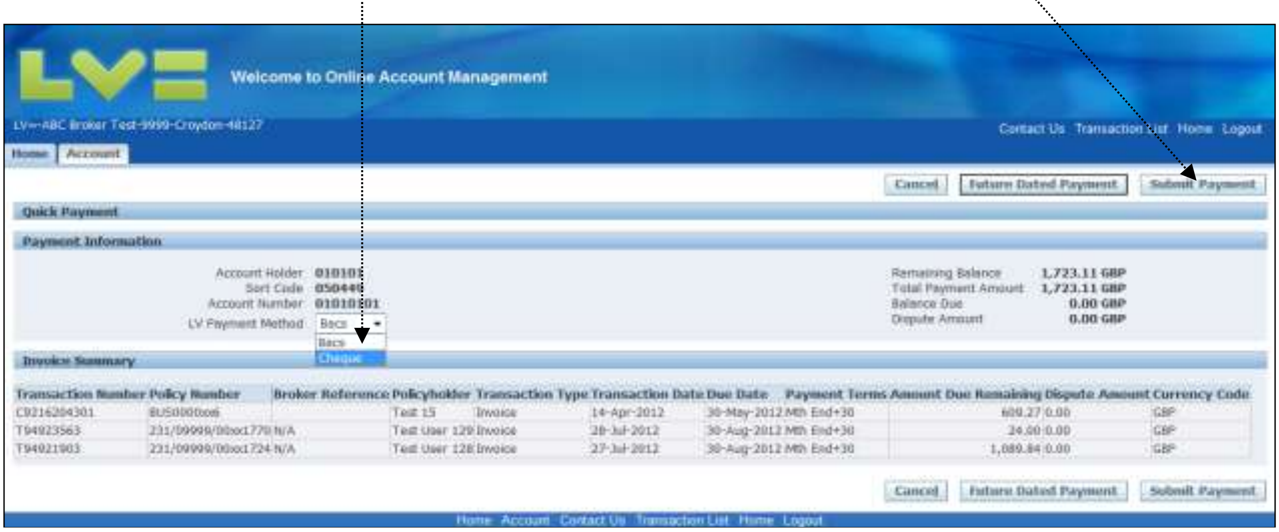
- To select the policies to be paid, you have several options; you can choose to tick the individual **Select boxes**, **Select All Transactions** on the account, or **Select** the transactions from the page displayed.



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

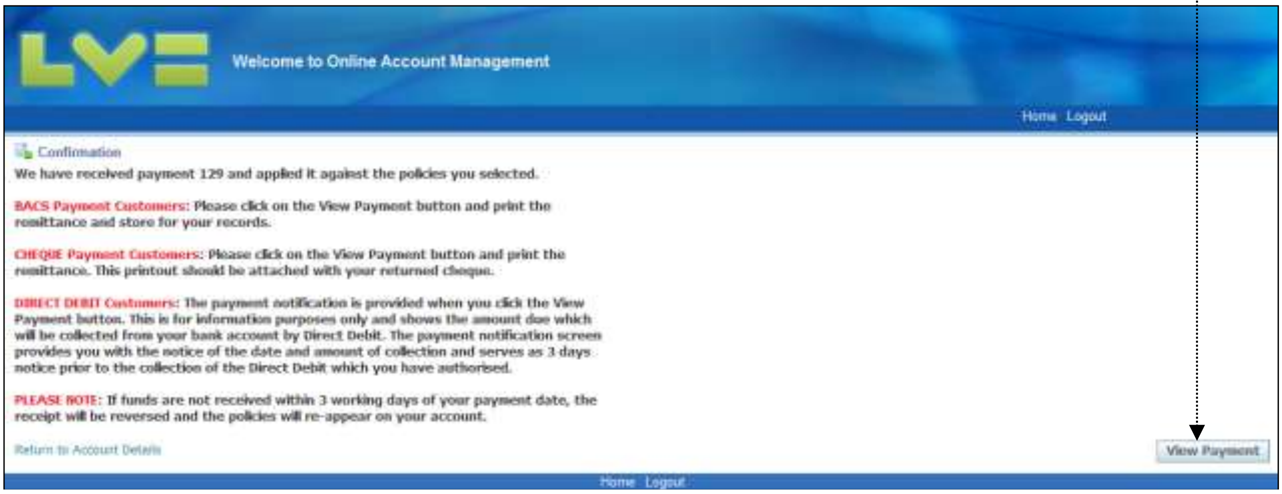
- If Items have been added to the Transaction List, they will remain ticked on the account screen. Click the link in the top right corner to view the **Transaction List**. On this screen you can choose to **Save Transaction List** and come back to it at a later date. When a Transaction List has been 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**

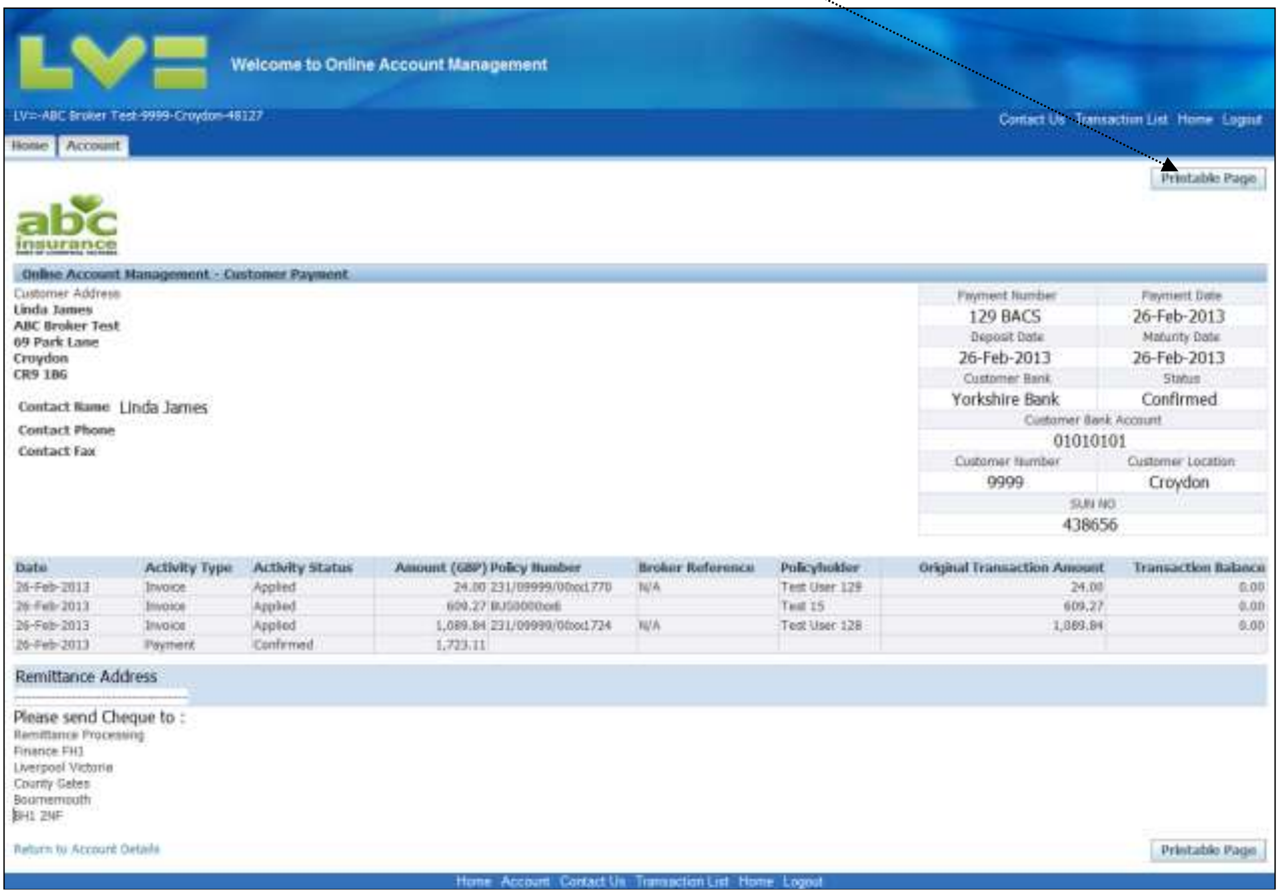


Please note: If you have not signed up for Direct Debit collection, then select your payment method of either **BACS** or **Cheque**. If paying by **cheque**, you are required to complete the **Cheque reference** field with your **Cheque number**.

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

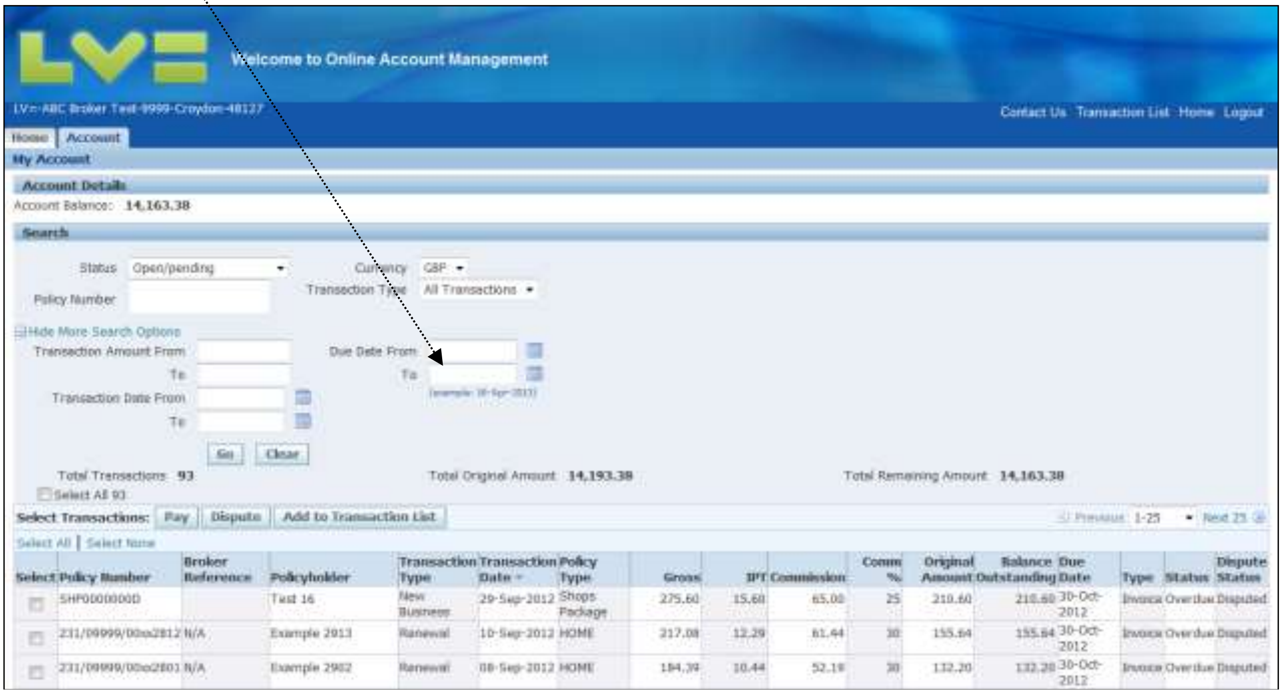


- Please click on the **Printable Page** button. This will print a remittance advice that you will need to attach to your **Cheque** when sending payment.

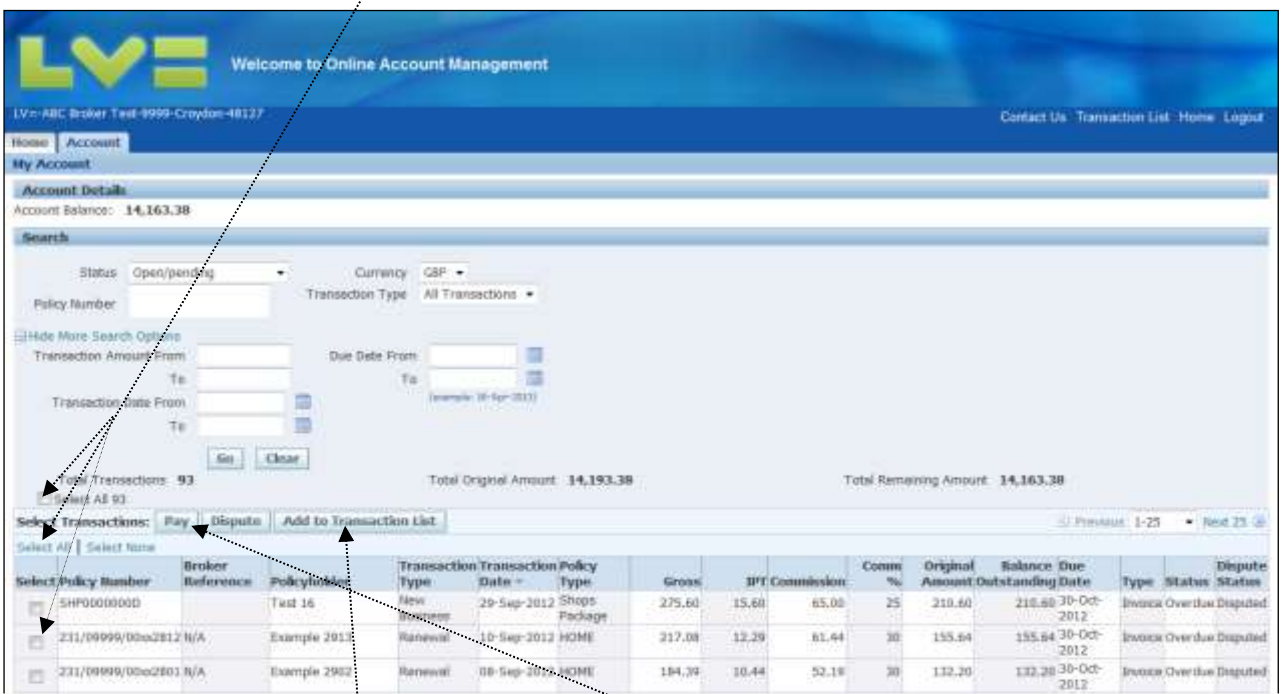


Making a Payment - Future Dated Payment

- 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.



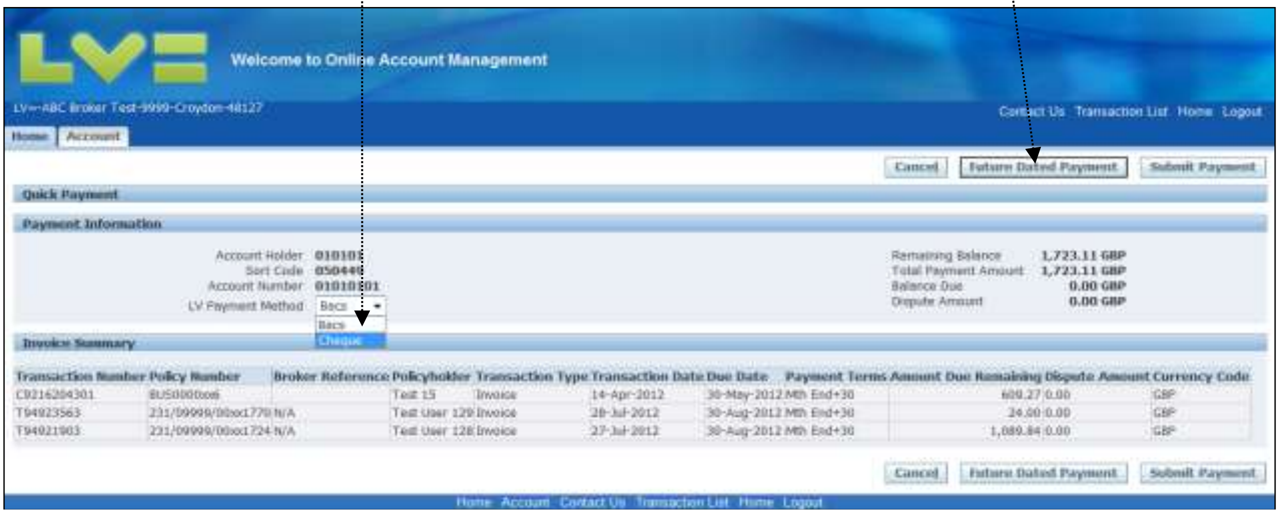
- To select the policies to be paid, you have several options; you can choose to tick the individual **Select boxes**, **Select All Transactions** on the account, or **Select** the transactions from the page displayed.



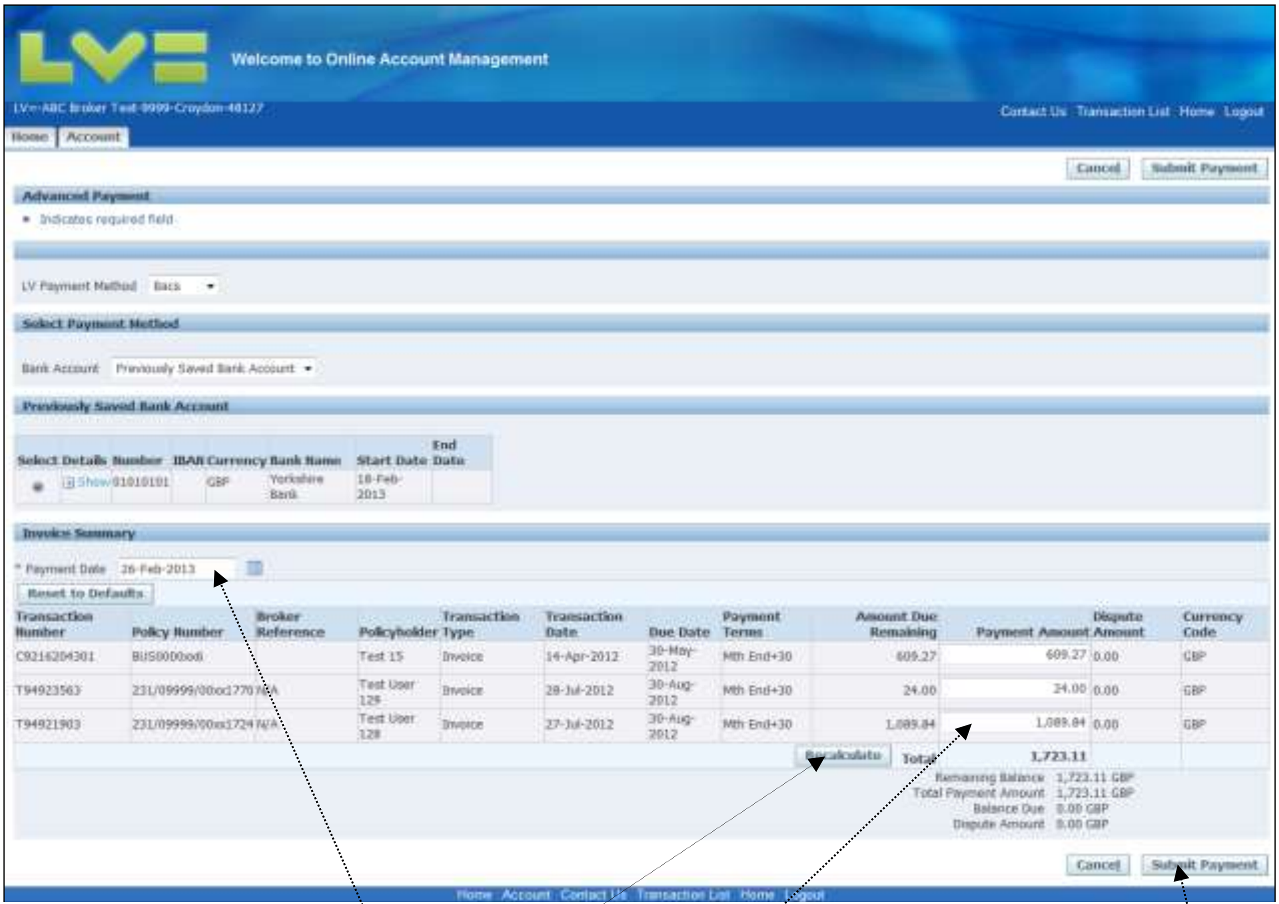
- When all selections have been made, click **Pay**. If you would like to pay multiple policies, select **Add to Transaction List**.

- 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**

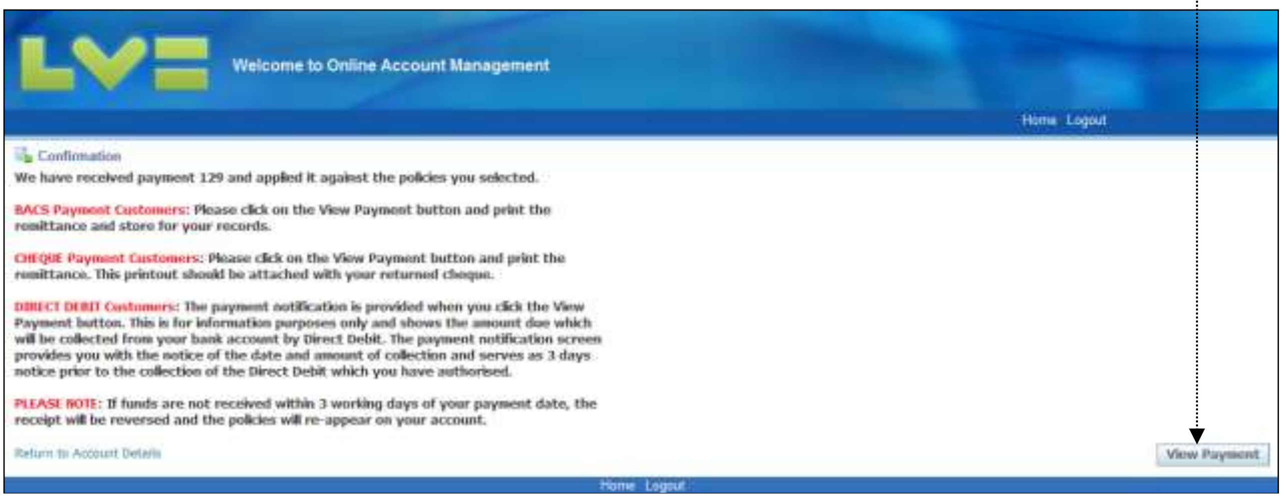


Please note: If you have not signed up for Direct Debit collection, then select your payment method of either **BACS** or **Cheque**. If paying by **cheque**, you are required to complete the **Cheque reference** field with your **Cheque number**.

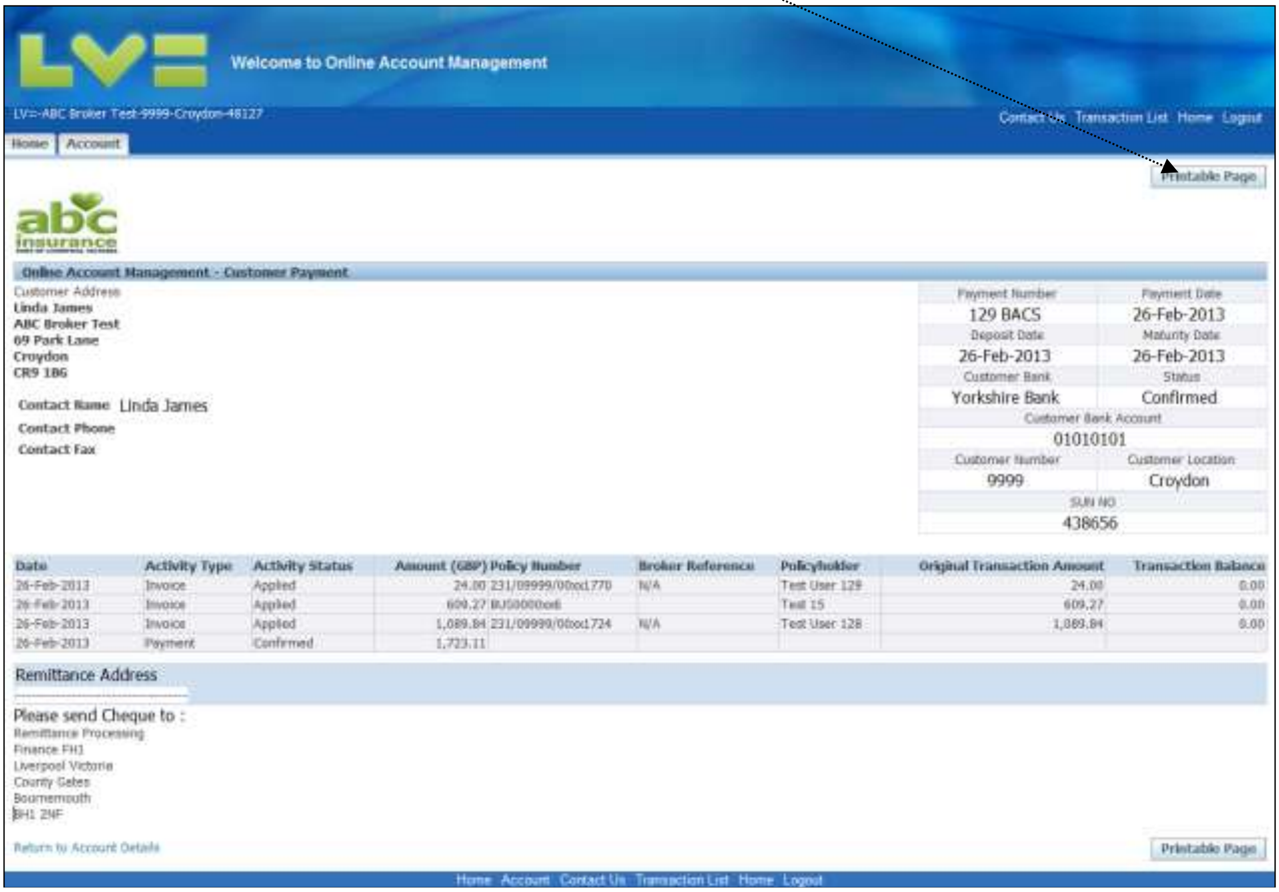


- Amend the **Payment date** and **Payment amount** where applicable. Once changes have been made, select **Recalculate** to update with the changes and then **Submit Payment.**

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



- 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.



Welcome to Online Account Management

LV=-ABC Broker Test-9999-Croydon-48127

Contact Us Transaction List Home Logout

Home Account

Printable Page

Online Account Management - Customer Payment

Customer Address
Linda James
ABC Broker Test
69 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
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	231/09999/00od1770	N/A	Test User 129	24.00	0.00
26-Feb-2013	Invoice	Applied	609.27	BJ50000od6		Test 15	609.27	0.00
26-Feb-2013	Invoice	Applied	1,089.84	231/09999/00od1724	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 FH1
Liverpool Victoria
County Gates
Bournemouth
BH1 2NF

Return to Account Details

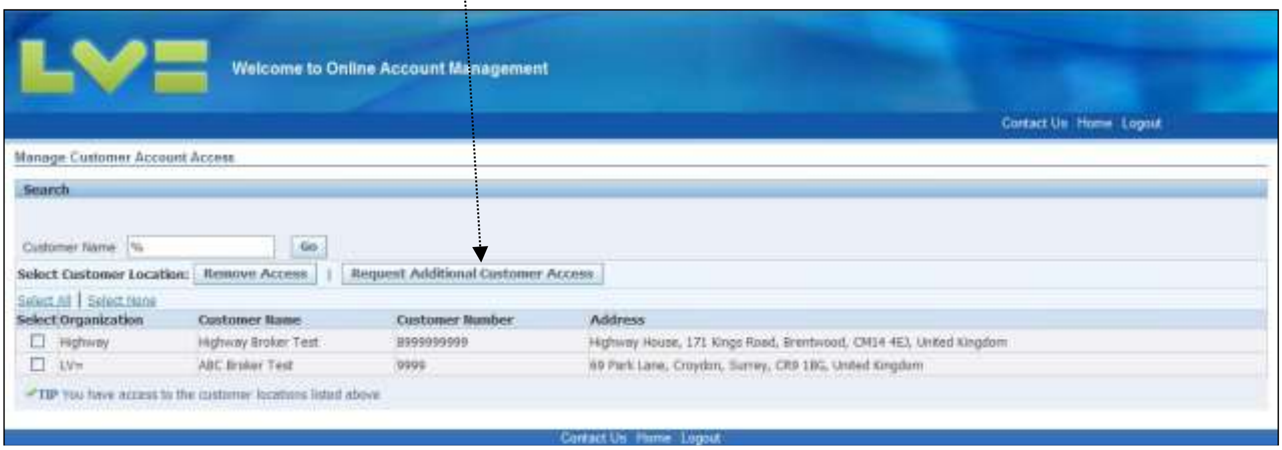
Printable Page

Home Account Contact Us Transaction List Home Logout

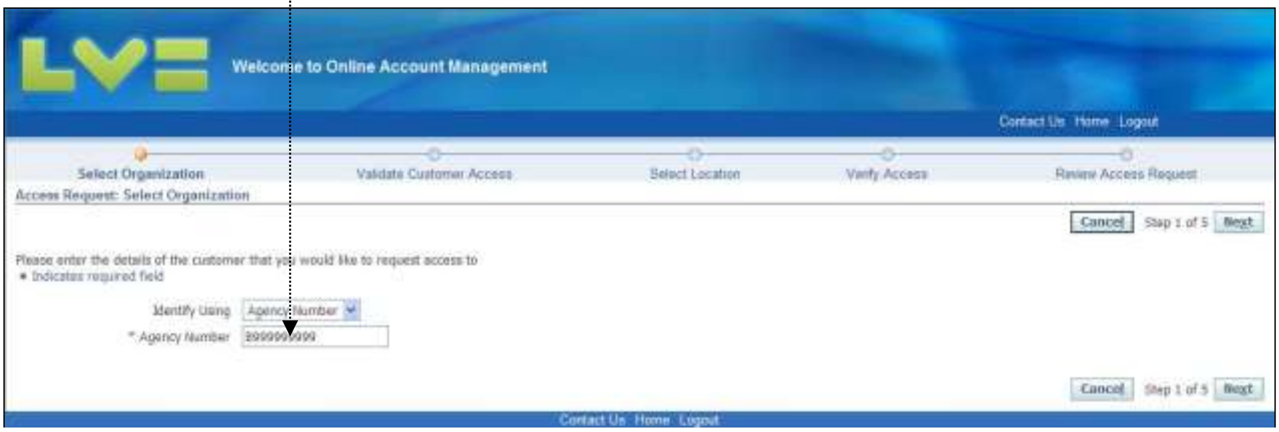
Adding Additional Accounts

- Select **Manage Customer Account Access**.

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

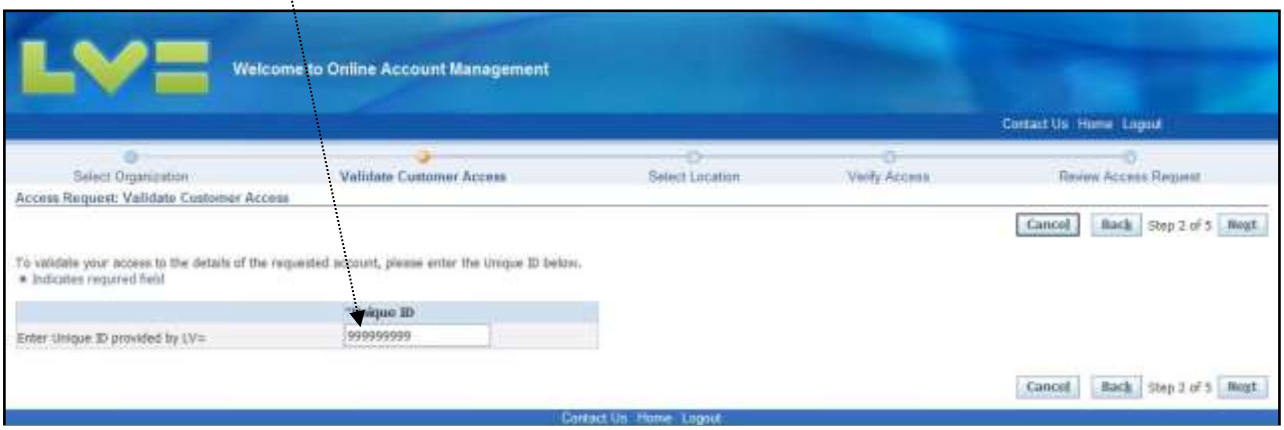


- Enter the **Agency number** that you want to have access to online.



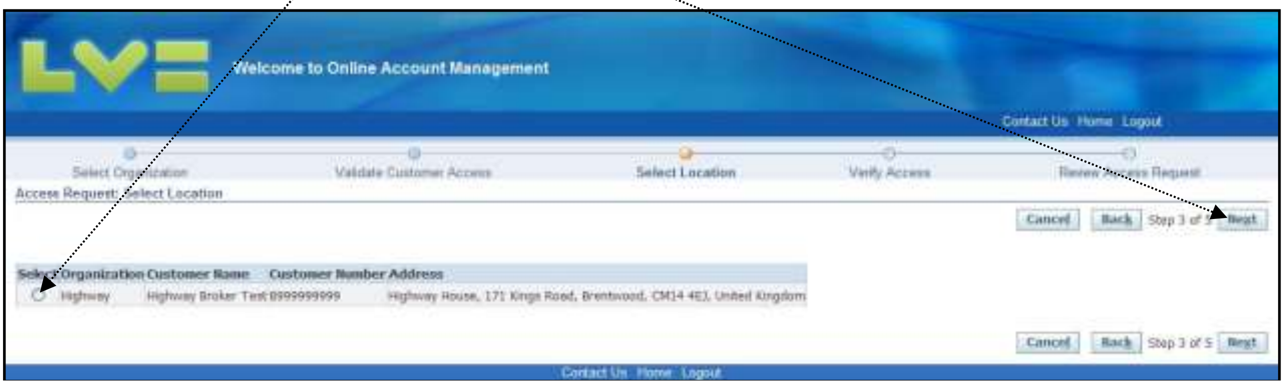
*Please note: This agency number can be for either ABC or Highway.

- 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.

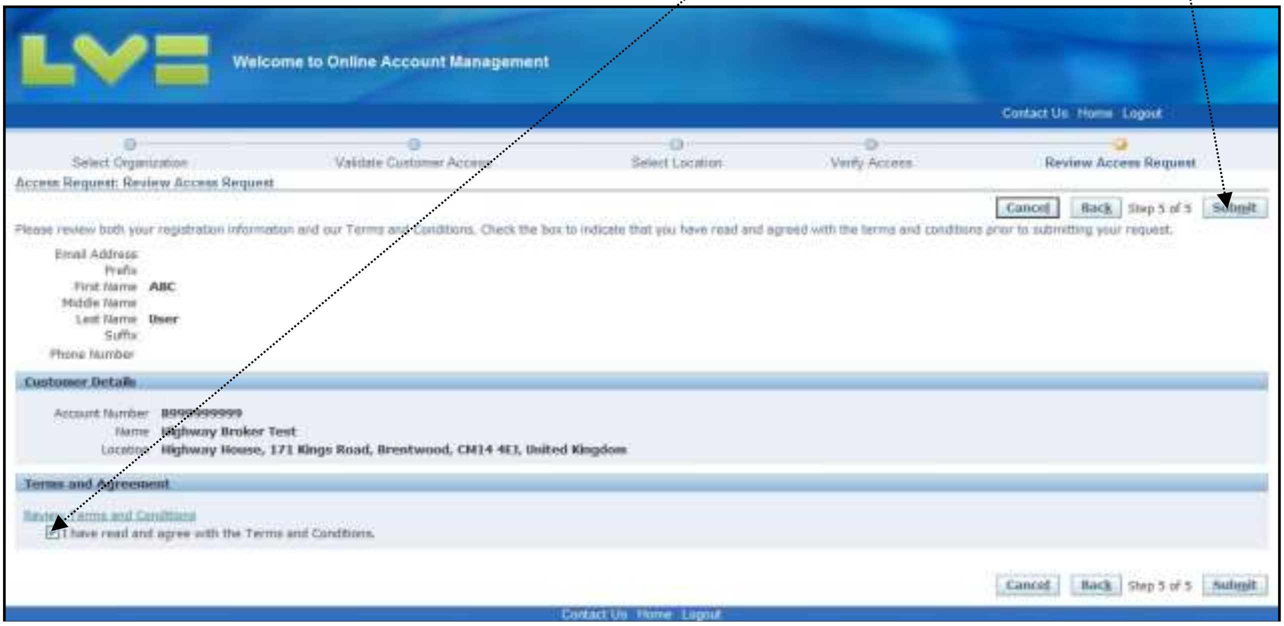


*Please note: This Unique ID would have been provided either in the initial email when requesting set up on Online Account Management or in the email when you requested additional access.

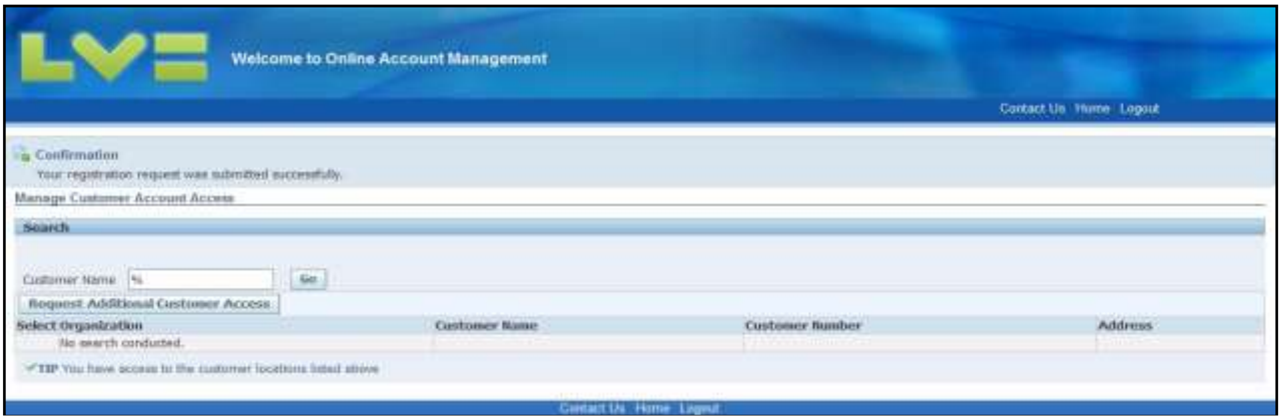
- Click on the **Select** button, then click **Next**.



- 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.

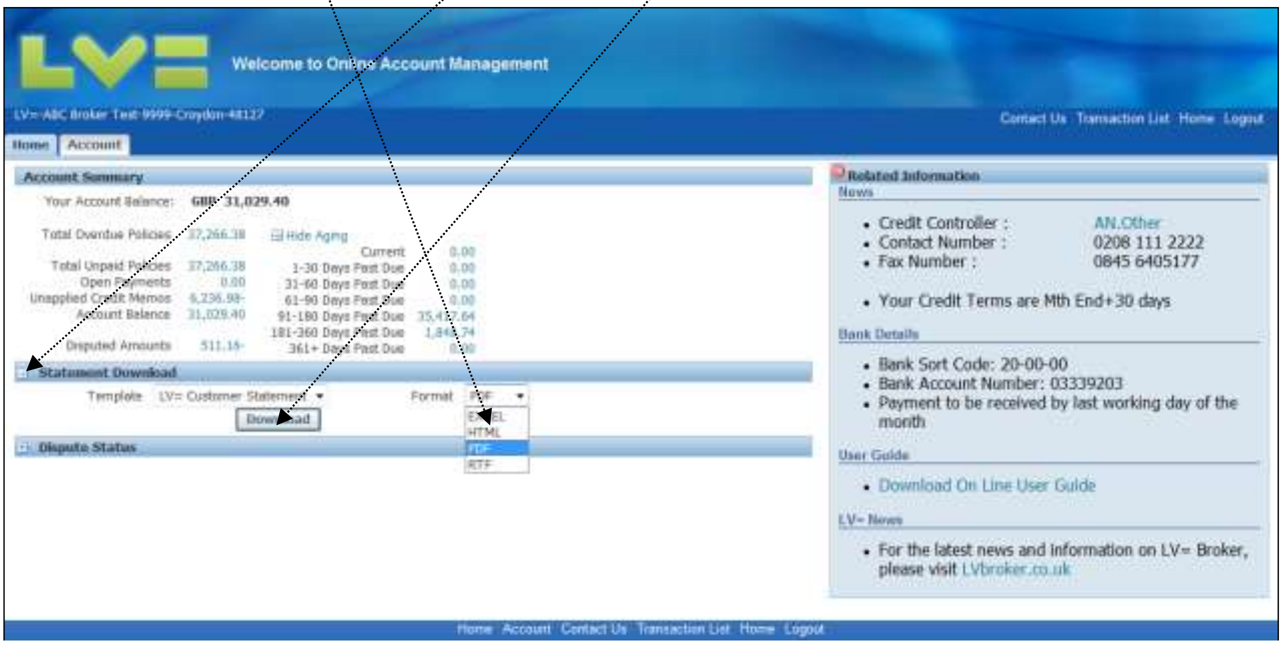


Viewing Disputed Policies

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

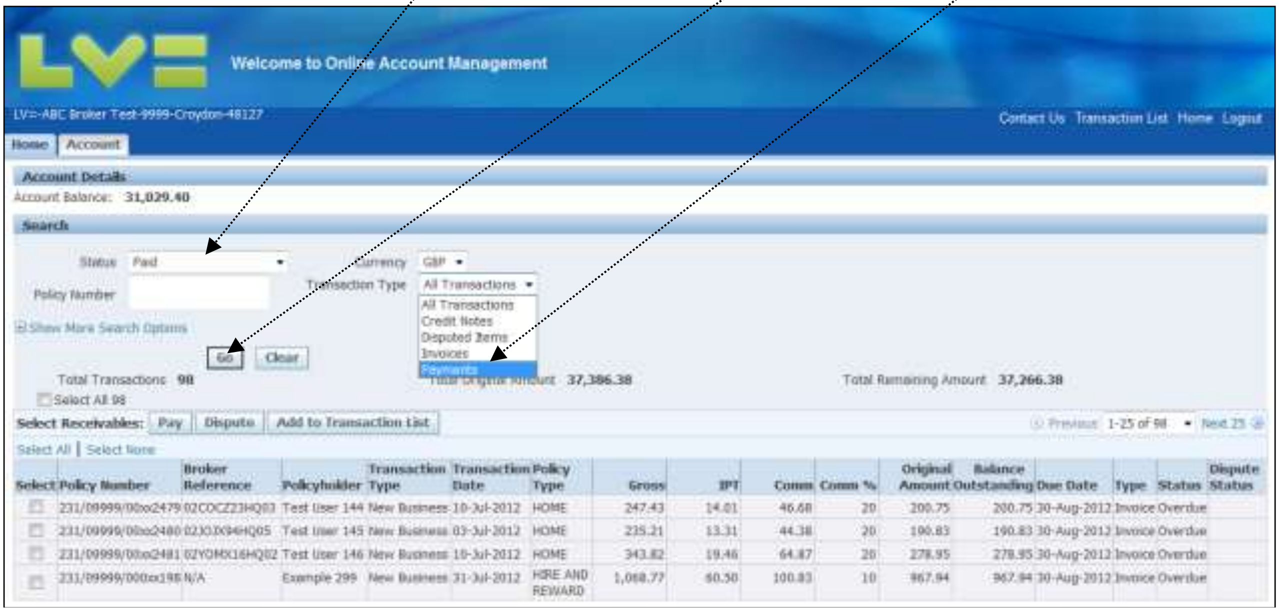
Downloading a Statement

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

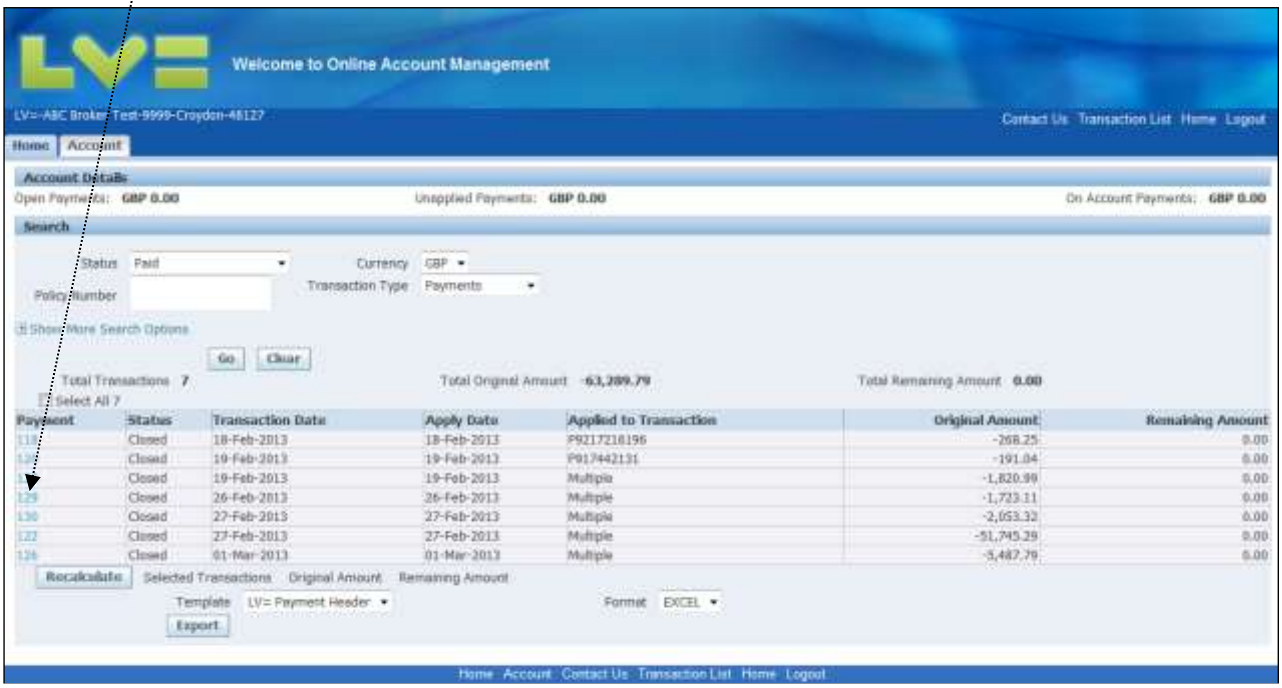


Viewing Payments

- 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**.



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



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