



Broker **Portal**

A guide to your Broker Portal

Broker Personal Lines



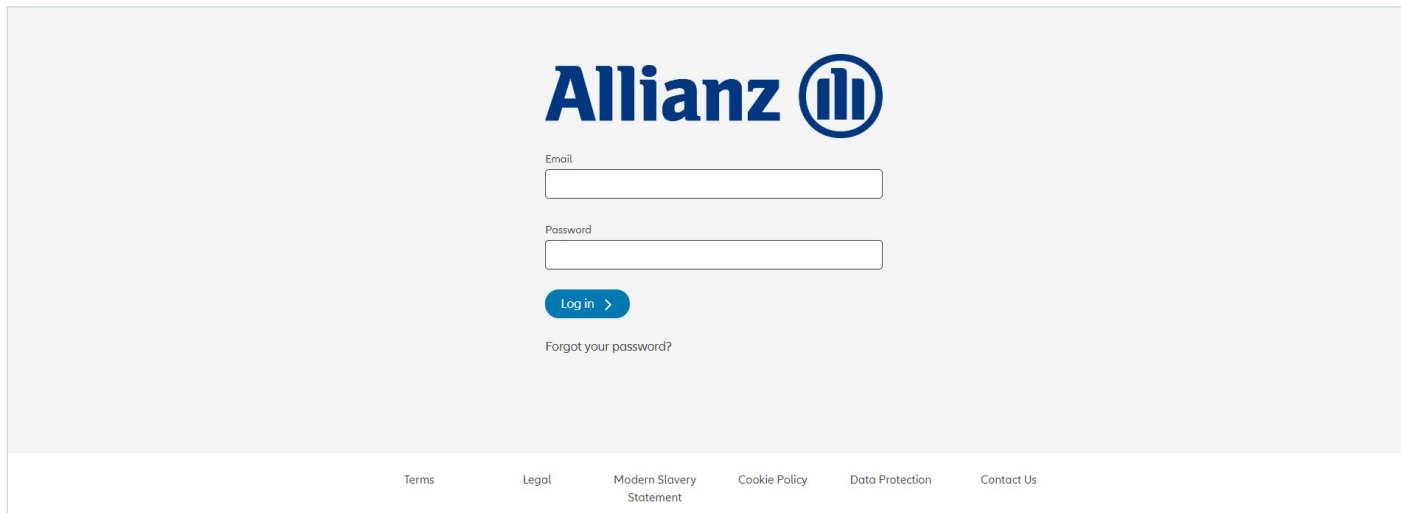
Contents

The **Allianz 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 Allianz Broker Portal [here](#)
- 1.3 You can also login from our [website](#)



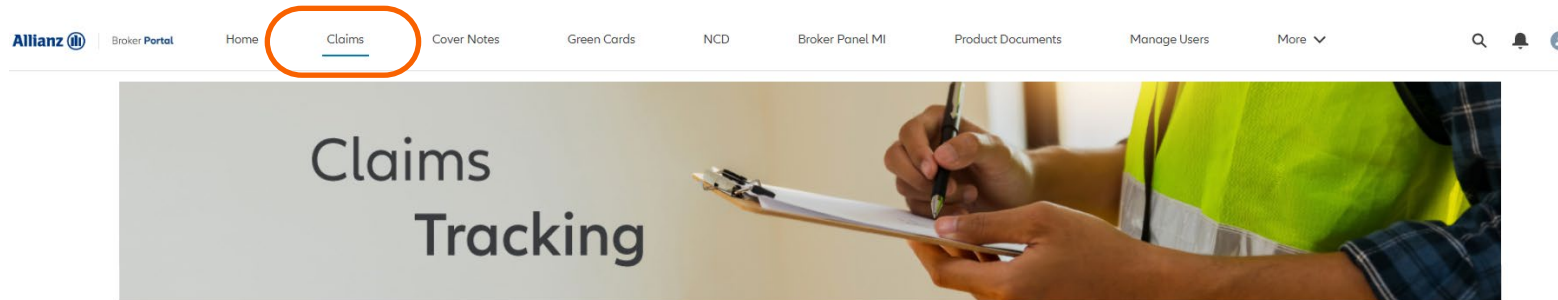
The screenshot shows the login page for the Allianz Broker Portal. At the top center is the Allianz logo. Below it are two input fields: one for 'Email' and one for 'Password'. A blue 'Log in >' button is positioned below the password field. Underneath the button is a link that says 'Forgot your password?'. At the bottom of the page, there is a footer with several links: 'Terms', 'Legal', 'Modern Slavery Statement', 'Cookie Policy', 'Data Protection', and 'Contact Us'.

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

Claims tracking

Viewing your claims

2. Go to Home > Claims



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

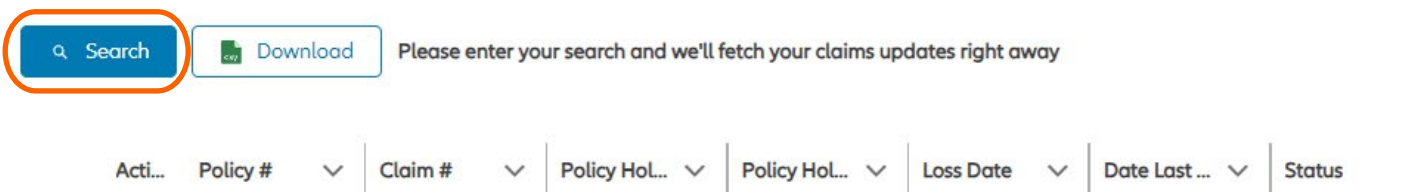
Filter by

[Specific Search](#) Loss Date Date Updated

Claim Number Policy Number Broker Reference Policy Holder Surname Policy Holder Postcode

Exclude windscreen claims

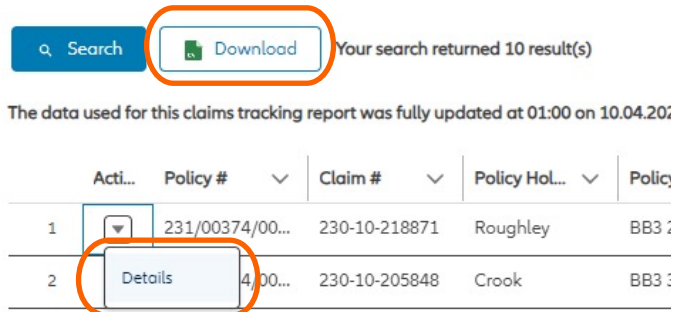
2.2 Click Search to populate your claims



The screenshot shows the search and filter interface. The 'Search' button is highlighted with an orange circle. To its right is a 'Download' button. Below these buttons is a message: 'Please enter your search and we'll fetch your claims updates right away'. Below the message is a table header with columns: Acti..., Policy #, Claim #, Policy Ho..., Policy Ho..., Loss Date, Date Last ..., and Status. Each column has a dropdown arrow next to it.


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**



Your search returned 10 result(s)

The data used for this claims tracking report was fully updated at 01:00 on 10.04.2024

	Acti...	Policy #	Claim #	Policy Ho...	Polic...
1		231/00374/00...	230-10-218871	Roughley	BB3...
2	Details	4,00...	230-10-205848	Crook	BB3...

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

Claim details

 230-10-218871 

Broker Branch: Martin Bird Insurance Brokers

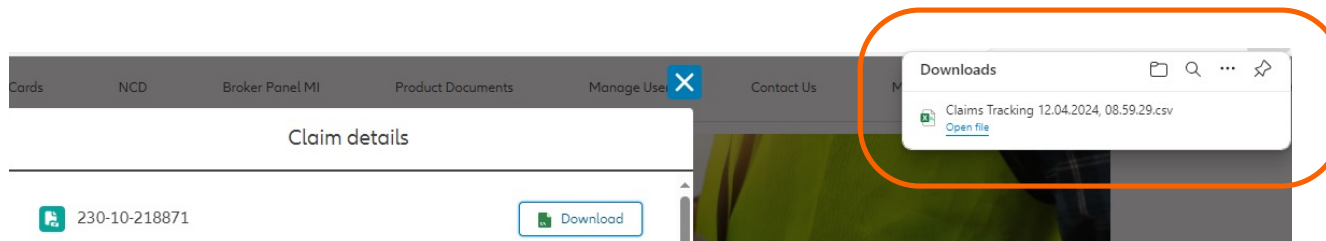
Agency Number: [Redacted]

Type Of Policy: Personal motor



Policy Number: 231/00374/000348

Claim Number: 230-10-218871

2.6 If you're using Microsoft Edge, the Claims Report will **download straight away** and can be found in the **top right corner** of the browser.
If you're using Google Chrome, the Claims Report will **download straight away** and can be found in the **bottom left corner** of the browser.



Claim details

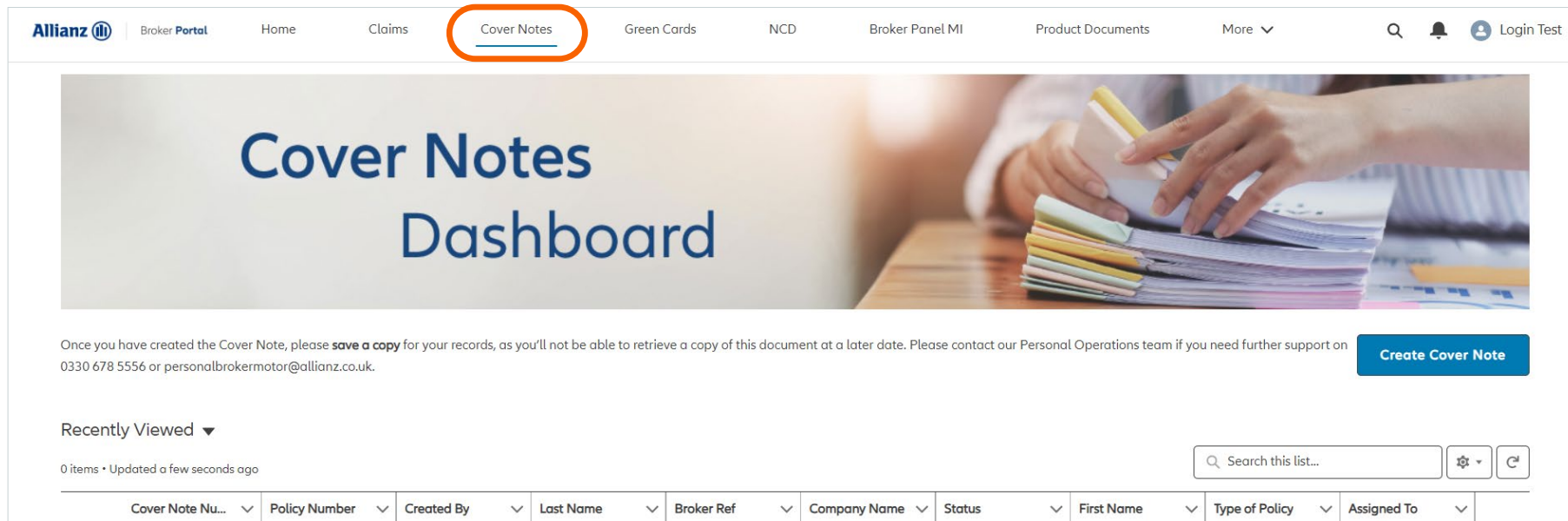
 230-10-218871 

Downloads

Claims Tracking 12.04.2024, 08:59:29.csv
[Open file](#)

Cover Notes

3. Home > Cover Notes



[Allianz](#) | [Broker Portal](#) | [Home](#) | [Claims](#) | **[Cover Notes](#)** | [Green Cards](#) | [NCD](#) | [Broker Panel MI](#) | [Product Documents](#) | [More](#) | [Search](#) | [Notifications](#) | [User Profile](#) | [Login Test](#)

Cover Notes Dashboard

Once you have created the Cover Note, please **save a copy** for your records, as you'll not be able to retrieve a copy of this document at a later date. Please contact our Personal Operations team if you need further support on 0330 678 5556 or personalbrokermotor@allianz.co.uk. [Create Cover Note](#)

Recently Viewed ▾

0 items • Updated a few seconds ago

Search this list... [Settings](#) [Refresh](#)

Cover Note Nu...	Policy Number	Created By	Last Name	Broker Ref	Company Name	Status	First Name	Type of Policy	Assigned To
------------------	---------------	------------	-----------	------------	--------------	--------	------------	----------------	-------------

Creating a Cover Note

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



Please contact our Personal Operations team if you need further support on

Create Cover Note

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.

Create Cover Note

Broker Information

* Broker Branch

Broker Ref

Policy Information

Type of Policy

* Policy Number

Date/Time Cover Required

* Date * Time

Effective To Date/Time

* Date * Time

Broker Information

* Broker Branch

Broker Ref

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

Vehicle Details

Vehicle Registration

XX10 XXX

Next

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

Vehicle Type

--None--

* Vehicle Make

* Vehicle Model

* Year of Manufacture

--None--

* Vehicle CC

* Registration, Chassis or Engine Number

XX10 XXX

4.4 Click **Add Driver**, then input drivers details. When adding driver excesses, select who these are relevant for, e.g. All Drivers, then enter the appropriate excesses.


Driver Excesses

Enter the total excess, including additional/voluntary excesses. If excesses differ between drivers, select the best option to enter the correct excess for every driver

All Drivers

All Drivers Except Named Drivers

Add Named Driver

#	Driver	Accident	Fire	Theft	Windscreen	Delete
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'

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

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

Broker Portal Home

 Success! The Cover Note has been submitted and is ready for printing. Please click "Download Cover Note" on the top right of the screen.

Cover Note Summary

Cover Note CN - 226446

 + Follow Void Extend Cover Note Download Cover Note

Policy Number	Type of Policy	Date/Time Cover Required	Effective To Date/Time
231/23456/123456	ABC Car	01/04/2024 09:24	05/04/2024 09:24

DETAILS FEED

Policy Information

Cover Note Number	Broker Branch
CN - 226446	Allens Brokers (Bournemouth, BH9 2RH)
Status	Broker Ref
Processed	Ref 123456
Type of Policy	Related Cover Note
ABC Car	
Policy Number	Reason for Issue
231/23456/123456	Change of Driver
Date/Time Cover Required	Cover Period in Days
01/04/2024 09:24	4
Effective To Date/Time	
05/04/2024 09:24	

Drivers (2)

Last Name	First Name	Accidental Dama...	Fire
Last Name	First Name		
All Drivers		250	250

Cover Note History (3)

Date	Field	User	Original Value	New Value
26/03/202...	Created.	sara clark		
26/03/202...	Cover Note ...	sara clark	CN - 226446	
26/03/202...	Created	sara clark	26/03/2024	

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

Cover Note CN - 226446

 + Follow Void Extend Cover Note **Download Cover Note**

4.10 If you're using Microsoft Edge, the Cover Note will **download straight away** and can be found in the **top right corner** of the browser. If you're using Google Chrome, the Cover Note will **download straight away** and can be found in the **bottom left corner** of the browser.

Once you have created the Cover Note, please save a copy for your records, as you'll not be able to retrieve a copy of this document at a later date.

26446

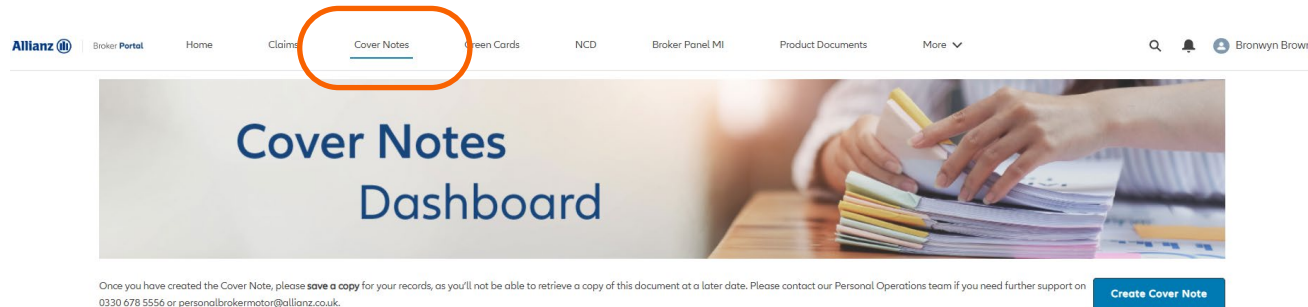
Product Documents Manage Users

Recent download history

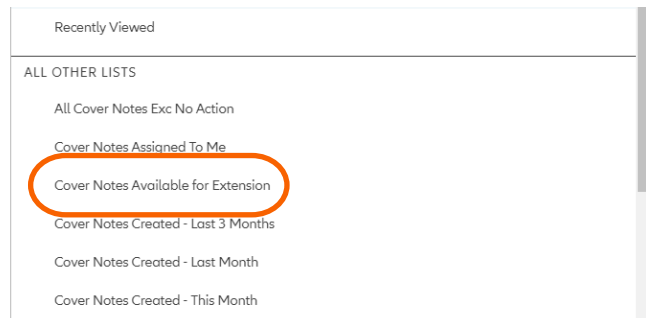
	CN - 226446.pdf
	50.2 KB • Done

Cover Note extensions

4.11 Click Cover Notes to access the Cover Note Overview table



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



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

1 item • Sorted by Cover Note Number • Filtered by All cover notes - Created Date • Updated a few seconds ago

	Cover Note N...	Policy Number	Broker Ref	First Name	Last Name	Company ...	Vehicle Regi...	Status	Created Date	Assigned To	On Hold	
1	CN - 226445	231/1234/1234556	13123	Timothy	Allen		VN57 AZF	Processed	12/03/2024 13:06			

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

Extend Cover Note

Date/Time Cover Required

Date: Time:

* Effective To Date/Time:

Next

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

Policy Number	Type of Policy	Date/Time Cover Required	Effective To Date/Time
231/12345/123456	ABC Car	30/03/2024 09:52	31/03/2024 10:01

DETAILS FEED

Policy Information

Cover Note Number CN - 226448	Broker Branch Allens Brokers (Bournemouth, BH9 2RH)
Status Processed	Broker Ref Ref 1234567
Type of Policy	Related Cover Note

4.18 Click Download Cover Note

If you're using Microsoft Edge, the Cover Note will download straight away and can be found in the top right corner of the browser.

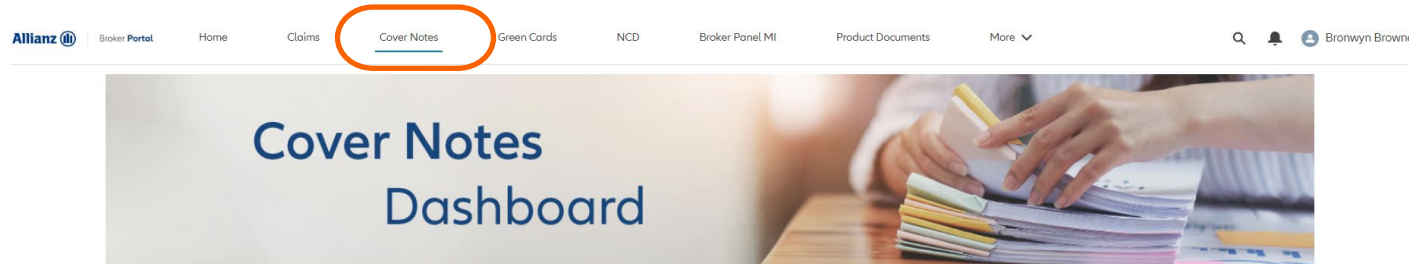
If you're using Google Chrome, the Cover Note will download straight away and can be found in the bottom left corner of the browser.

Once you have created the Cover Note, please save a copy for your records, as you'll not be able to retrieve a copy of this document at a later date.



Voiding a Cover Note

4.19 Click Cover Notes to access the Cover Note Overview table



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

1 item • Sorted by Cover Note Number • Filtered by All cover notes - Created Date • Updated a few seconds ago

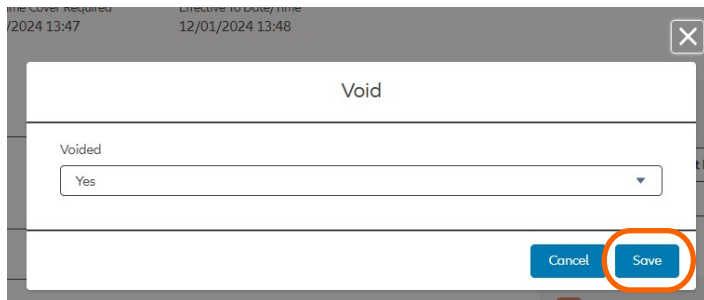
Search this list...  

Cover Note N...	Policy Number	Broker Ref	First Name	Last Name	Company ...	Vehicle Regi...	Status	Created Date	Assigned To	On Hold
1 CN - 226445	231/1234/1234556	13123	Timothy	Allen		VN57 AZF	Processed	12/03/2024 13:06		

4.21 Click Void



4.22 Select Voided Yes in the dropdown and click Save



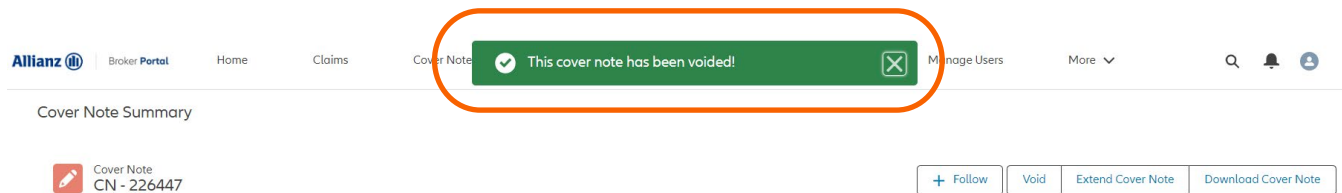
Void


Voided

Yes


Cancel Save

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



Allyanz  Broker Portal Home Claims Cover Notes ✓ This cover note has been voided! Manage Users More

Cover Note Summary

 Cover Note CN - 226447

+ Follow Void Extend Cover Note Download Cover Note

4.24 The Cover Note Status will now show as Void

Cover Notes Created - Today ▼

3 items • Sorted by Created Date • Filtered by All cover notes - Created Date, Hidden • Updated a few seconds ago

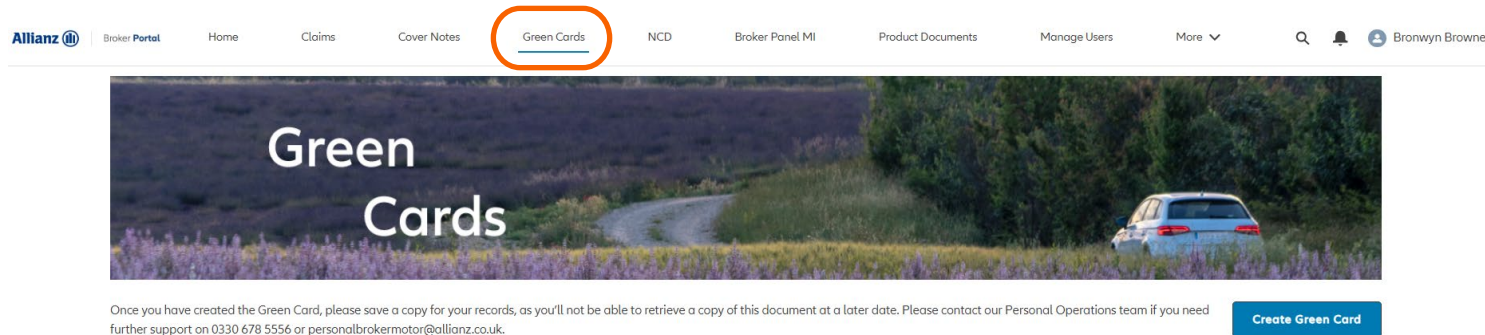
Search this list... [Settings] [Refresh]

Cover Note Num...	Policy Number	Broker Ref	First Name	Last Name	Company ...	Vehicle Regis...	Status	Created Date ↓	Assigned To
1	CN - 226448	231/12345/123456	Ref 1234567	First Name	Last Name	HX13UYA	Void	26/03/2024 10:01	▼
2	CN - 226447	231/12345/123456	Ref 1234567	First Name	Last Name	HX13UYA	Void	26/03/2024 09:53	▼
3	CN - 226446	231/23456/123456	Ref 123456	First Name	Last Name	HX13UYA	Processed	26/03/2024 09:43	▼

Green Cards

Creating a Green Card

5. Go to Home > Green Cards



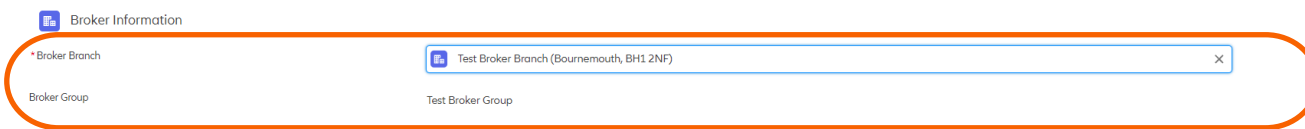
5.1 From the Green Card overview screen click Create Green Card

ations team if you need



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

Create Green Card



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 25-Mar-2024

* 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 --None--

Vehicle Registration

Will you be towing a Caravan or Trailer?

Named Drivers

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

Add named driver(s) other than Insured

- 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

Vehicle Registration

Will you be towing a Caravan or Trailer?

- None--
- Caravan
- Trailer

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 Insured

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'

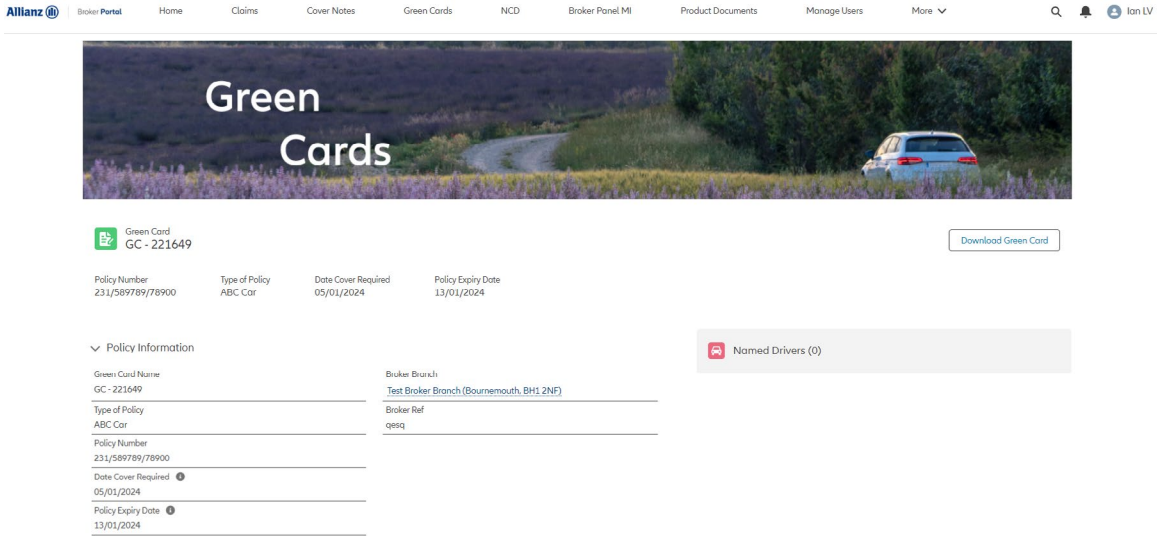
5.8 Amend/Submit Cover Note: To make a change to the Green Card, click Back. To finalise the Green Card click the Green Submit button

Named Drivers

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

Add named driver(s) other than Insured

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

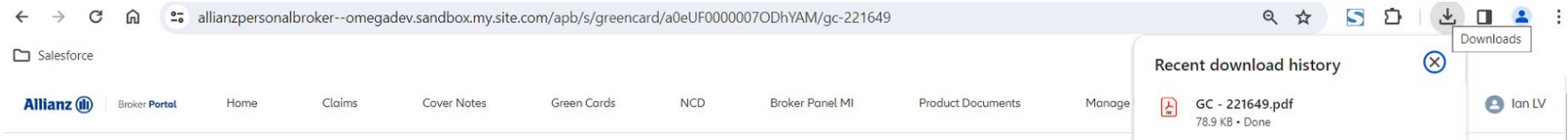


5.10 Download Green Card: Click Download Green Card in the top right corner of the overview screen



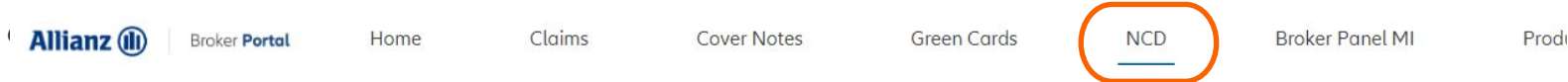
5.11 If you're using Microsoft Edge, the Green Card will download straight away and can be found in the top right corner of the browser. If you're using Google Chrome, the Green Card will download straight away and can be found in the bottom left corner of the browser.

Once you have created the Green Card, please save a copy for your records, as you'll not be able to retrieve a copy of this document at a later date



NCD

Request No Claims Discount



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

Please note. We are unable to issue proof of no claims bonus for policies due to lapse until 14 days prior to the renewal date. If your request is made prior to this it will not be actioned until this time frame. We are able to issue NCD's for policies already lapsed, within 14 days of lapse date, cancelled or for active proof of no claims.



Recently Viewed ▾

0 items • Updated a minute ago

⚙️
🔄

6.2 Search for and select the Broker Branch

Create New NCD

* Broker Branch

Title

* First Name

* Last Name

🔍 Show All Results for "Broker"

Test **Broker** Branch (Bournemouth, BH1 2NF)
Broker Branch

Test **Broker** Group Two (Birmingham, B5 4US)
Broker Branch

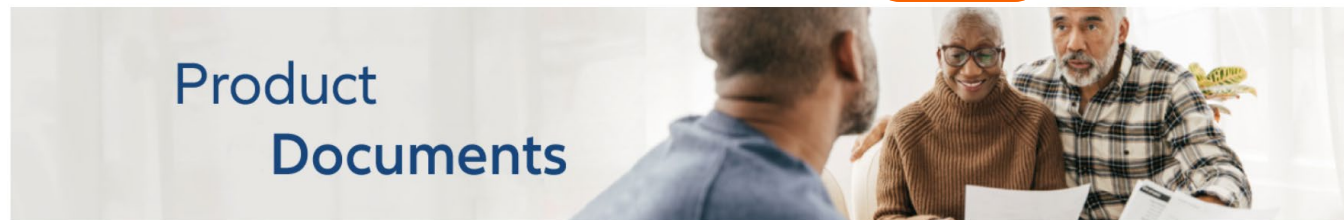
6.3 Fill in the details and click **Submit**

Cancel
Submit

Product Documents

Ordering Stationery

7 Go to Home > Product Documents

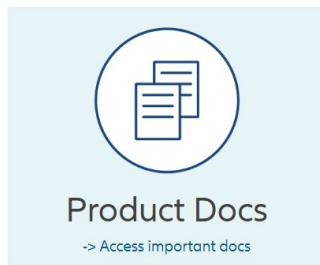


Welcome to your product documents area

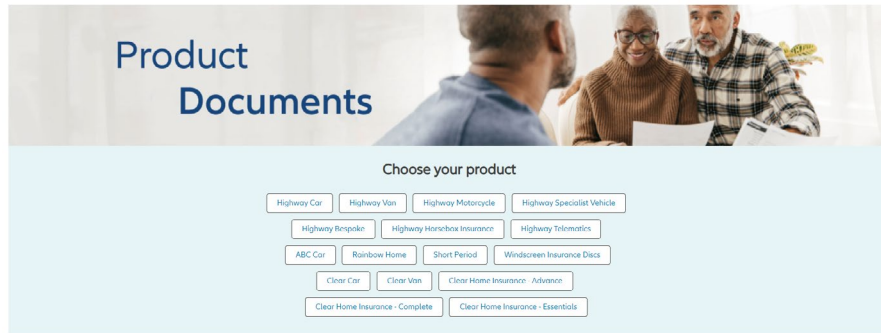
Here you can view and download PDF copies of our product documents. Just select the correct document and click 'Download' - it's as easy as that! If you do have any problems, just drop us a line at personalbrokerportaladmin@allianz.co.uk and we'll get back to you.

7.1 Select the area you'd like to view

Libraries



7.2 In Product Documents select the product you require



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



Highway Car Insurance

12 Items | Product documents

Allianz policies purchased

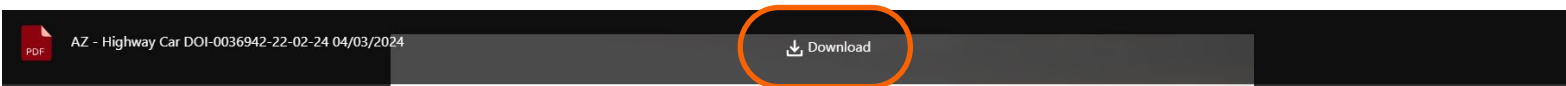
- > Document of Insurance - policy wording
- > IDD Product Summary Statement
- > IPID - For all policies bought on or after 1 August 2022
- > Value Assessment Outcome September 23
- > CMA NCD Submission - HWY CarB - 2022
- > CMA NCD Submission - HWY Standard - 2022

LV= Policies purchased

- > Document of Insurance - policy wording
- > IDD Product Summary Statement
- > IPID - for all policies bought on or after 1 August 2022
- > Value Assessment Outcome September 23
- > CMA NCD Submission - HWY CarB - 2022
- > CMA NCD Submission - HWY Standard - 2022

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

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

We're committed to doing better for the environment – please help us where you can



You can get digital documents for customers instantly, online



Printed policy books are available for your vulnerable customers



Please think twice before you order – Thanks for helping make a difference

Think
before you print

Name: Login Test
Account: Test Broker Branch (Bournemouth, B11 2NF)
Address: Poole, Bournemouth, B11 2NF, United Kingdom, Business G12, Business G13
Printed documents will only be sent to the address shown here.
If this is incorrect please email personalbrokerage@allianz.co.uk to update our records before placing your order.

Name	Product Documents	Reference	Quantity	Unit
About Allianz - V2			<input type="text" value="2"/>	2

7.6 Enter the amount of copies you require and click Next

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](#)

7.7 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:*

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

Broker Portal

Home

✓ 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).

✕

🔍
🔔
👤 Login Test

□
Print Request P-1825

□
Print Request Lines (1)

Print Request Line Name	Reference	Quantity	
About Allianz - V2		2	▼

[View All](#)

Print Request Name
P-1825

Order Rationale
Rationale entered here

Status
Pending

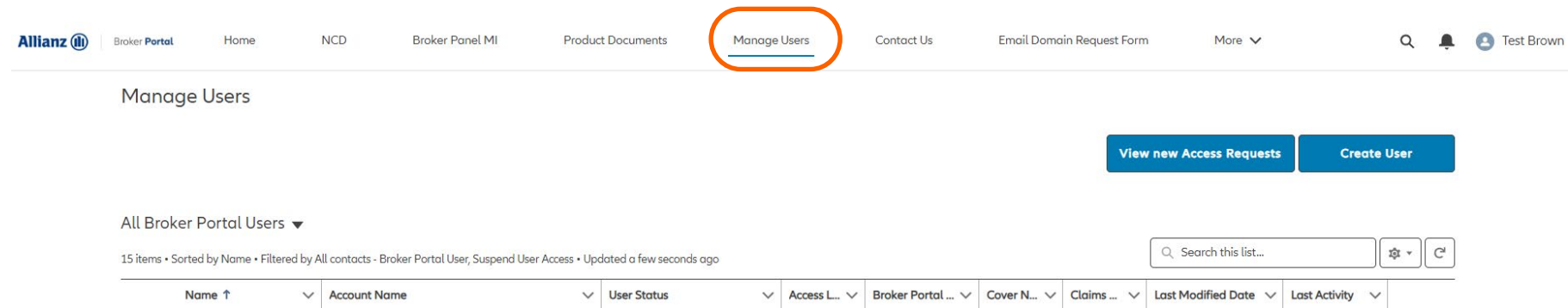
Account
[Test Broker Branch \(Bournemouth, BH1 2NF\)](#)

Contact
[Login Test](#)

Manage users

Create users

8 Go to Home > Manage users





Manage Users

[View new Access Requests](#) [Create User](#)

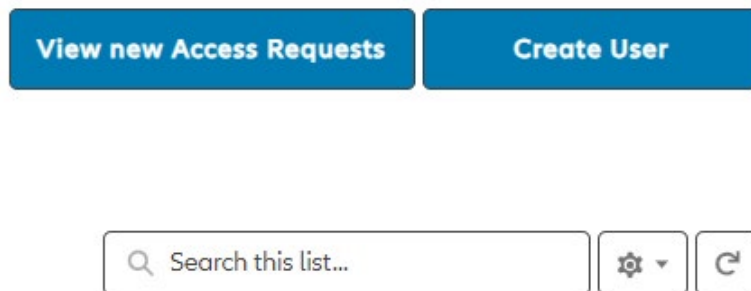
All Broker Portal Users ▼

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



Search this list...  

Name ↑	Account Name	User Status	Access L...	Broker Portal ...	Cover N...	Claims ...	Last Modified Date	Last Activity	
--------	--------------	-------------	-------------	-------------------	------------	------------	--------------------	---------------	--

8.1 To set up a new user click **Create User**

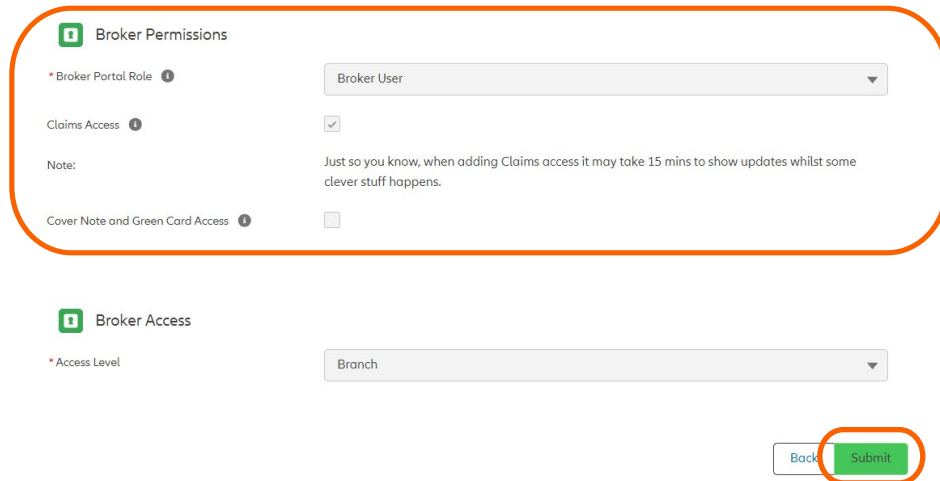


[View new Access Requests](#) [Create User](#)

Search this list...  

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



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 ⓘ

Broker Access

* Access Level

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**

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 ⓘ

Broker Access

* Access Level

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

Broker Portal

Home
Claims

✓ Success!
Nice work, your user's been successfully created. We've sent them an email so they can activate their account.
✕

More ▾

Broker Summary

Contact

First Name Test Last Name Test

Job Title	Account Name	Phone	Email	Contact Owner
Job Title Test	<u>Test Broker Branch (Bournemouth, BH1 2NF)</u>		bro...	<u>Login Test</u>

Name	✎
First Name Test Last Name Test	
Job Title	✎
Job Title Test	
Account Name	✎
<u>Test Broker Branch (Bournemouth, BH1 2NF)</u>	
Email	✎
bronwyn.browne@allianz.co.uk	

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

Name	
First Name Test Last Name Test	
Job Title	
Job Title Test	
Account Name	
Test Broker Branch (Bournemouth, BH1 2NF)	
Email	
bronwyn.browne@allianz.co.uk	
∨ User and Permission Information	
Broker Portal Role 	User Status
Broker User 	Awaiting TOU Acceptance
Access Level	Suspend User Access 
Branch 	<input type="checkbox"/> 
Cover Note and Green Card Access 	
<input type="checkbox"/> 	

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 Role 	User Status
<input type="text" value="Broker User"/>	Awaiting TOU Acceptance
	<i>This field is calculated upon save</i>
Access Level	Suspend User Access 
<input type="text" value="Branch"/>	<input type="checkbox"/>
Cover Note and Green Card Access 	
<input type="checkbox"/>	
Claims Access 	
<input checked="" 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 
<input type="checkbox"/> 



Contact us

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