Fast Trade Aviva Ireland
User Guide

AVIVA

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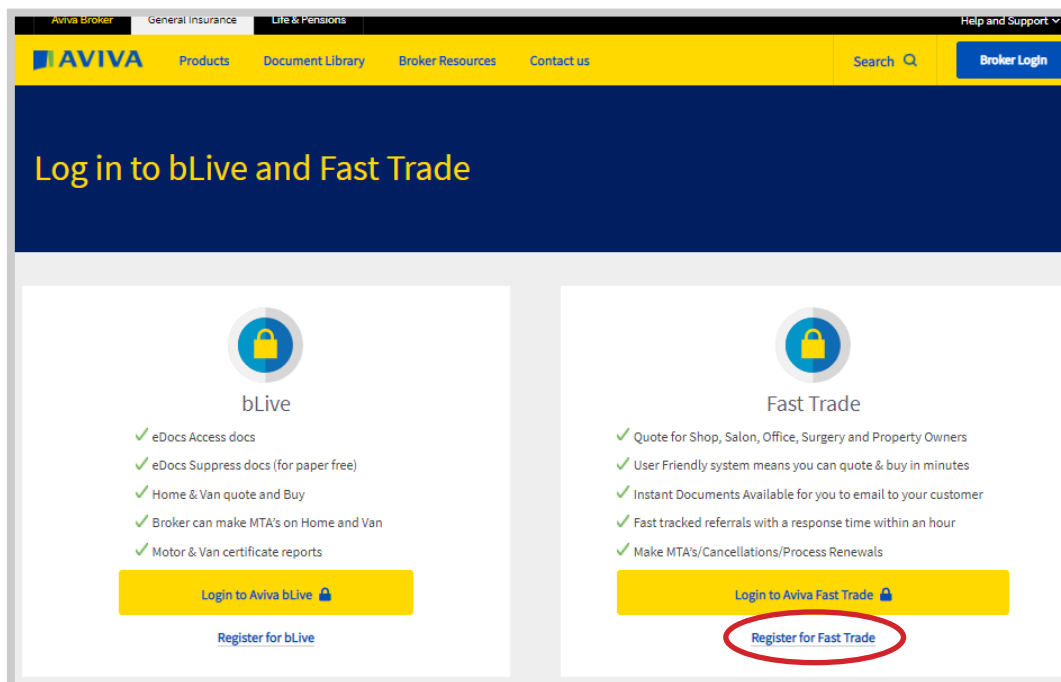
Aviva Broker Website and Fast Trade Log In screen

- Visit the following website address to access Fast Trade – https://www.avivabroker.ie/general-insurance/
- Click on the Broker Login button as highlighted below.
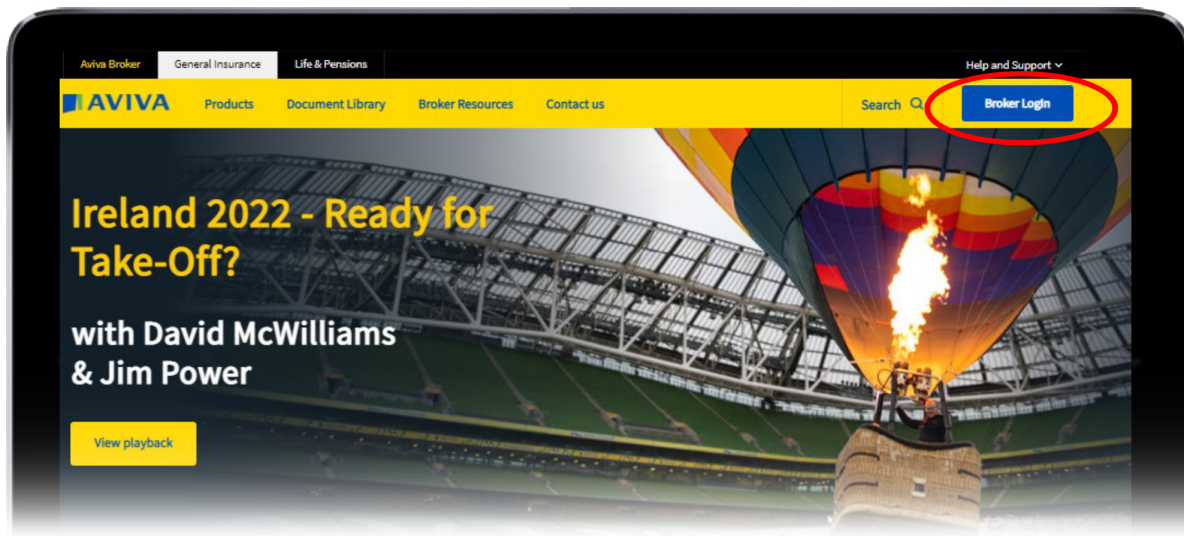
a. New User Set-Up

- **New Users – if you do not have a Fast Trade User ID, then please follow these steps;**
  Register for Fast Trade via the website form located on the log in screen (highlighted below).
  Alternatively, contact the AvivaBroker Support Team by email @ avivabrokerirl@aviva.com.

- **Once you have placed your request, our Support Team will confirm your User ID and Password by separate email. Please follow the steps noted the User Log In Process to access Fast Trade**

- Select the Fast Trade Log In option as highlighted below.

- Enter your Client ID and password. Then click Login to proceed.

• If you have forgotten your password, click on the "Forgot your password?" link highlighted below

• You will need to enter your Client ID and Email Address and click Proceed, as highlighted below.
  You will receive an email notification with your new password within a few minutes of placing your request.

General System Usage

a. Find Client

- From the Home Page click on Find Clients as highlighted below
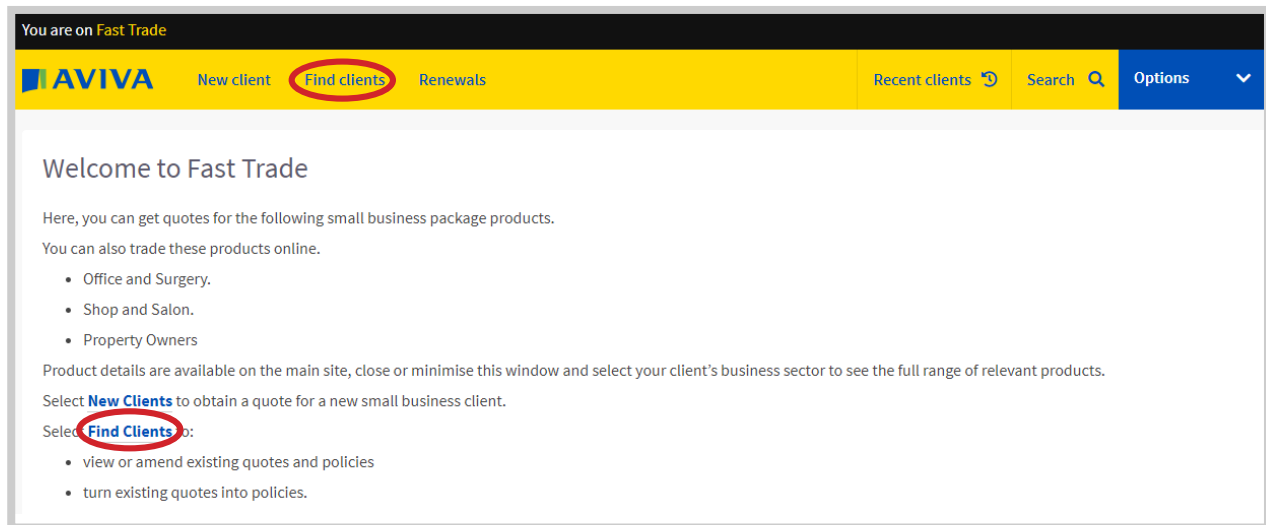
- On the next page type in the Client Name and Click Search

• Results for your search will appear as below.

• Click on the Client Name or View to see policies and quotes for this client. If you wish to get a new quote for this client click on New Quote

- Alternatively, you can search for the client using the Search function and enter the Client Name, Policy Number or Quote Number. See below

b.   Read Only Mode

- This function allows you to view a Quote without triggering any rating or underwriting rules again.
  To view a quote in read only mode, click on View/Amend as highlighted below.

- You will note the Read Only Mode is activated at the top of the screen and that questions are "frozen" and cannot be edited. If you wish to change the answer to a question, click Amend.

- Quote Versioning allows you to create multiple quotes for a single client on the same product. The advantage is that you can create multiple quotes with different sums insured and covers rather than having to override the first quote and lose the work you have done. To set up another quote version you can do this in 2 ways.

  - On the Quote Summary screen, click create new version as highlighted below.

- On the next screen, you can enter in a name for the current quote and the new quote. For example, you might want a quote with and without building cover as per the below example. Both quotes will be retained and once you've consulted with the client, you can select the one needed.

• As highlighted below, both options are now saved in the Client Summary Page for you to return to at a later date.

• The second option for Quote Versioning is via the Read Only Mode option. Click Amend when in the Read Only Mode and

- You will be asked if you wish to create a New quote version, click on this option to create the new quote.
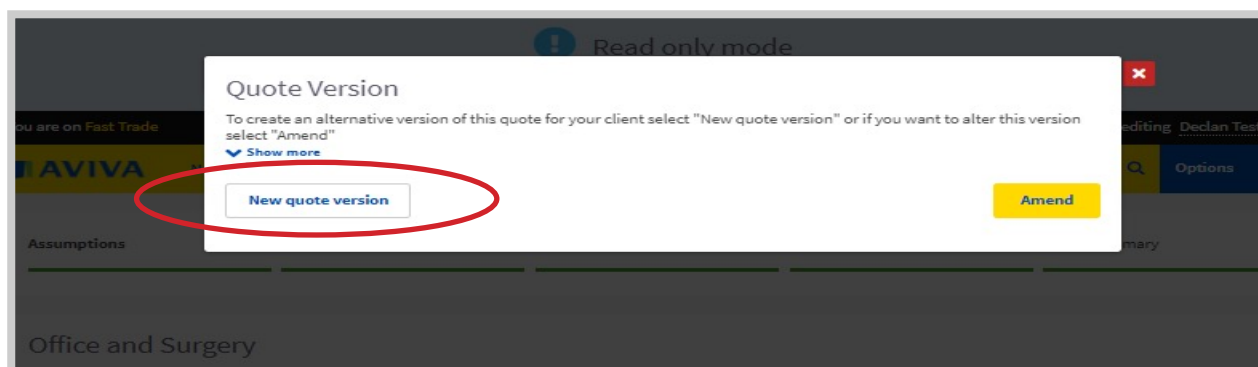
- Similar to the first option, you can name the new quote version as needed.
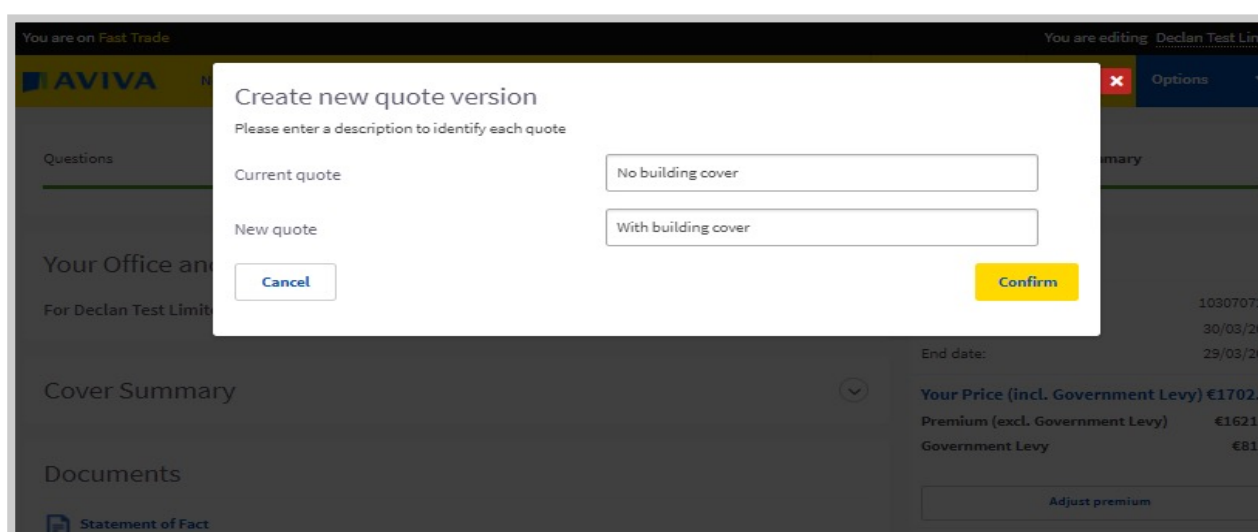
- There is new option to view Recent Clients that you have worked on, rather than having to search for the client again. You can do this by clicking on the Recent Clients option at the top of the screen as highlighted below.

- Click on the client name to proceed to the Client Summary screen, as highlighted below.

- This piece of functionality allows you to view any renewals due in the coming 30 days and also to see renewals that are overdue. From the home page in Fast Trade you can view the Renewals tab in the headings at the top of the page. See below.
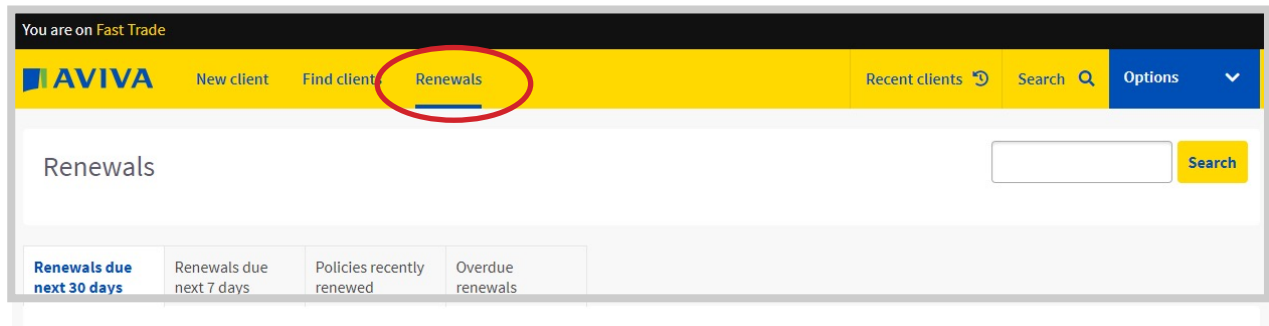
Once you click on the Renewals tab, you will be presented with 4 additional tabs to give you easy access to upcoming renewals. The additional tabs are;

1.   Renewals due next 30 days

2.   Renewals due next 7 days

3.   Policies recently renewed

4.   Overdue renewals

By clicking on one of the tabs you will be presented with the list of renewals in each category. You can click on View to be taken to the Quote Summary Page where you can access the renewal quote documents and accept cover.

For overdue you will see policies that have not be renewed. Please contact Aviva to discuss this renewal if required.

Call us
1800 800 900
Monday to Friday 9.00am - 5.00 pm
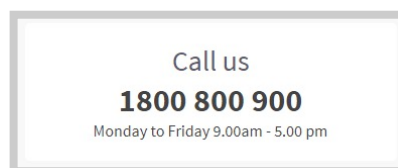
New Business Submission, Quote and Accept

- To start a New Business submission, simply click on New Clients or Find Clients if adding the submission to an existing client.

- Visit the Recent Clients tab, if you have visited this client record recently.
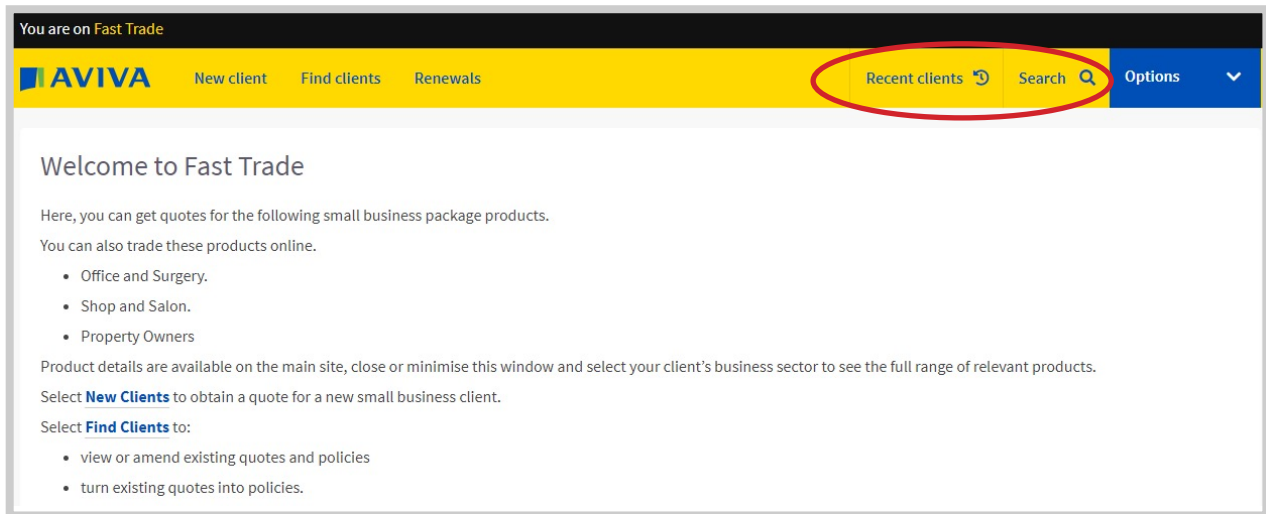
- Click on the product you wish to choose from the list of products available.
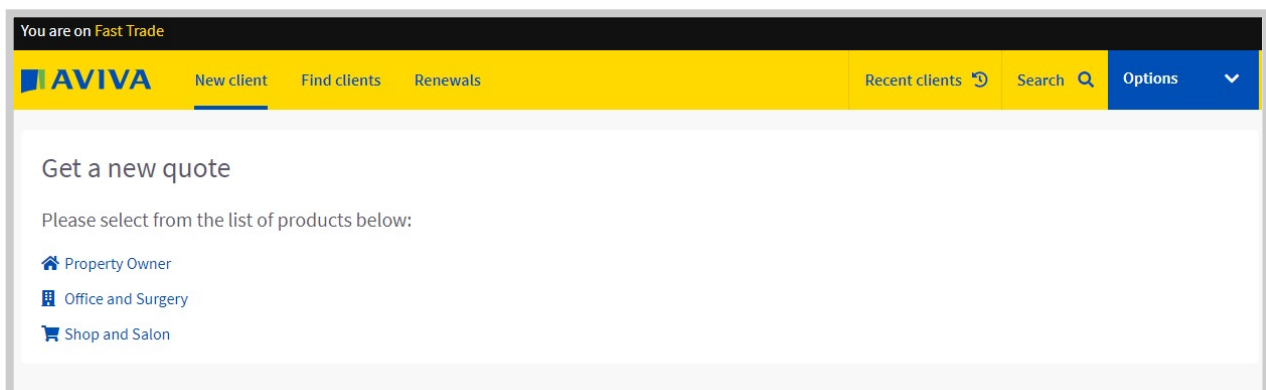
- You will be taken straight to the question set in order to start your New Business Quote.

- Once you have completed the question set, you will land on the Quote Summary Page which includes;

– Your total quoted price
– Your documentation;
  - Quote Schedule
  - Statement of Fact
  - Policy Wording
  - Insurance Product Information Document

– You can view the Cover Summary to see what questions and answers have been specified.

– If you wish to amend the quote, simply click View/Amend or create a new quote version as outlined above.

- If your quote has referred, you will be presented with the following screen.

- If you would like a call back on this referral, please click "Yes" and then "Save and Exit" to the question highlighted above and one of the Fast Trade Underwriting Support team will contact you as soon as possible.

- If you wish to proceed with your quotation, then click the "Buy Now" button.

- Select "Yes" to the following pop-up message to proceed.

- Once you have bound cover, you will arrive at the Policy Summary Screen where you can locate the following;

– Total Premium
– Policy Number
– Documentation as displayed below
– Direct Debit Mandate if your client would like to choose payment by instalement.

AVIVA   New client   Find clients   Renewals   Recent clients ↺   Search 🔍   **Options** ▼

Your Office and Surgery Policy

For Declan Test Limited

✅ Thank you for purchasing this policy. Your policy number is **AO262255789.**

Cover Summary ⌄

Documents

📄 **Statement of Fact**

📄 **Policy Schedule**

📄 **Policy Wording**

📄 **Insurance Product Information Document**

📄 **Direct Debit Mandate**

Summary

Policy Number:	AO262255789
Start date:	31/03/2022
End date:	30/03/2023

Your Price (incl. Government Levy) €1782.77

Premium (excl. Government Levy)	**€1697.87**
Government Levy	**€84.90**

Cancel Policy   **Amend**

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Mid-Term Adjustment (MTA) Submission, Quote and Accept

- In order to start a MTA, locate your Client and visit the Client Summary Screen.
- Please click on the Amend button to start the MTA.

- You will be asked to specify the Effective Date of the Adjustment.

- You will be directed to the question set where you can make the appropriate adjustment to the question set. Example increased building sum insured, as noted below

- Once you have completed the change in the system, you will receive an MTA quote.

- You can view the quote documentation and quote premium on the MTA quote summary screen.

- If you wish to go ahead with cover, please click Accept and you will be issued with MTA Policy Documents.

Renewals

a   Renewal Retrieval

• Using the renewals tab, you can quickly find renewals that are due in the next 30 days.

• First click on the Renewals tab as below, and then you can refine your search by using the Search box at the top of the screen.

• To view the renewal quote, click on View and you will be taken to the Renewal Quote Summary screen.

• On this screen, you can view the Renewal Quote premium, access documentation such as Quote Schedule and Statement of Fact.

b   Manual Accept Process for Upgraded Aviva Products

As Aviva upgrade our products on Fast Trade, you will need to manually confirm acceptance of renewal quote before the renewal date. You will notice the following pop-up message in the system which advise what you need to do to bind renewal quote cover.

The contact details for our Technical Support team are noted below should you need to get in touch.

Changes to your Office & Surgery Policy

⚠️ FastTrade Office & Surgeries policies no longer automatically renew. You need to manually accept renewal quotes by clicking the "Accept" button to bind cover before renewal date. Should you have any queries on this new process please call the FastTrade Technical Support Team email **avivabrokerIRL@aviva.com**

OK
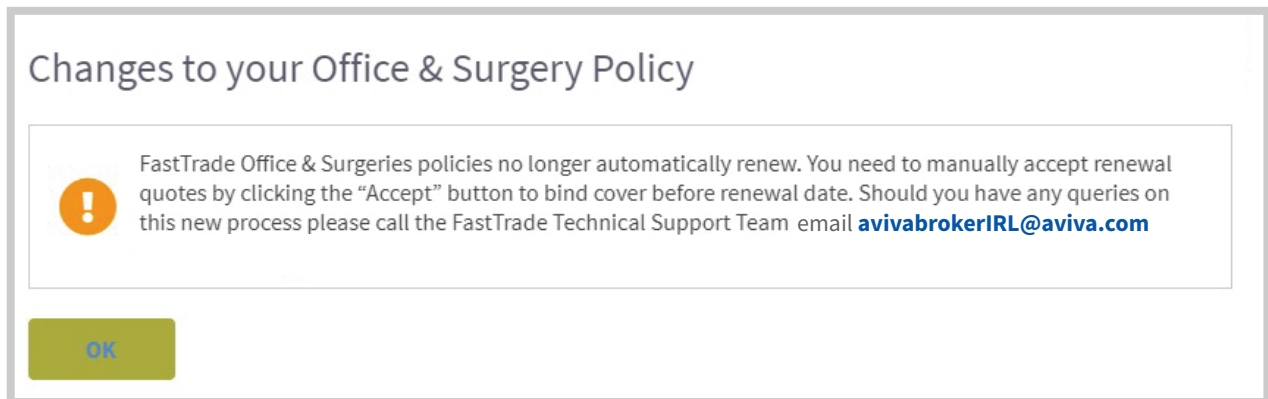
- As Aviva upgrade our existing products, there are some changes to note with regard to the question set as a result of new questions being added to the system.

- The below pop-up message for our new Office and Surgeries product, outlines answers to these questions that have been selected. We ask that you please review these answers and should they be incorrect you can amend the answer by clicking the View/Amend button and revisiting the question set.

- As you will note from the pop-up message, the contact details for the Fast Trade Trading Team are noted should you need to speak to our team.

Changes to your Office & Surgery Policy

FastTrade Office & Surgeries policies no longer automatically renew. You need to manually accept renewal quotes by clicking the "Accept" button to bind cover before renewal date. Should you have any queries on this new process please call the FastTrade Technical Support Team email **avivabrokerIRL@aviva.com**

Default Answers to New Questions – We have added default answers to some new questions for your Office & Surgery renewal. These new questions and the default answers are listed below;

Please ensure these answers are correct, if any answers are incorrect you can change these answers by clicking the "Amend" button on the summary screen and reviewing the question set. The answers to these questions will appear in the Statement of Fact. If you wish to discuss this further please email the FastTrade Trading Team **fastirlnb@aviva.com** or alternatively call us on 1800 800 900.

Please click OK to proceed.

OK

New Question	Default Answer
Has any proposer, director or partner involved with this business ever been disqualified from being a company director?	No
Has any proposer, director or partner involved with this business been prosecuted under any Health & Safety regulations, consumer protection legislation, or any other legislation?	No
What floor of the building is the premises to be insured located on?	Ground Floor
Are there any water courses or bodies of water within 200m of the insured location?	No
Are there any interested parties?	No
Number of employees	1
Do you require Property Owners Liability Cover?	No

- You can view Renewal quotes for these policies by visiting the Renewals Tab in the website or searching for the client using the search option. There is further detail on how to do this in the Renewal Retrieval section of this User Guide

For support or queries contact:
Fast Trade Trading Team on 1800 800 900
Fast Trade Technical Support Team
email fastirlnb@aviva.com

It takes Aviva.

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