



Victor for Brokers user guide

A fast, easy way to quote, issue, and service policies. All online, in minutes.





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Victor for Brokers for your business

With financial backing and local expertise, Victor brings stability, longevity, and in-depth experience to every corner of the UK. We help brokers offer a bespoke solution that suits you and your clients and are always focused on keeping the process simple; using the right technology to help you do what you do best.

Lucrative

Increase profitability through operational efficiency. Victorforbrokers.co.uk lets you quote, bind and issue in minutes.

Simple

Getting cover has never been so easy. Victorforbrokers.co.uk lets you work remotely and manage your business anywhere, anytime.

Explore our solutions:

- Agriculture
- Cargo and logistics
- Combined liability
- Commercial combined
- Cyber
- Motor
- Not for profit
- Professional liability
- Real estate

Flexible

You can pick and choose from a range of coverage options to tailor a policy that's made to measure.

Start with Victor

Make Victor your first stop and get a quote in minutes.



**Let us help you
grow your business**

Register at
victorforbrokers.co.uk
and start quoting and
issuing today.

Getting started — victorforbrokers.co.uk

Don't have an agency?

If you would like to apply for an agency with Victor, click on **Register** to be taken to our agency application form.

New users

All users must have their own username and password. If you have an agency with Victor and would like to access our portal, please contact: broker.support@victorinsurance.co.uk for access. A member of the Victor team will respond promptly.

Once your request has been approved, you will receive an email to complete your account and set up your password.

Returning users

If you already have a Victor account, visit: victorforbrokers.co.uk and select **Login** to start quoting!

User types

Standard — Quote and bind policies on our portal.

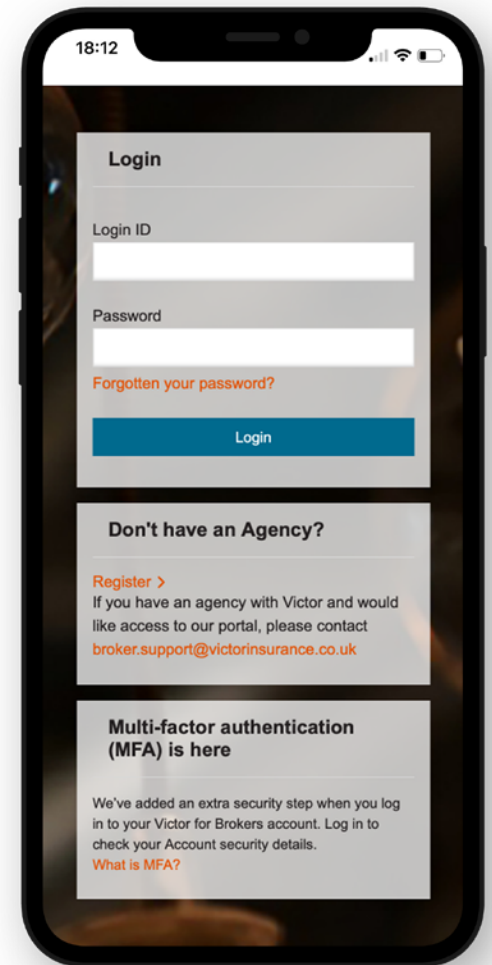
Administrator — Administrator users can quote and bind policies as well as manage login access locally. If you would like to obtain administrator access for your agency, email: broker.support@victorinsurance.co.uk. A member of the Victor team will respond promptly.

Multi-factor authentication

Two factor authentication: receive a code as part of your login process to either your registered email address or mobile number.

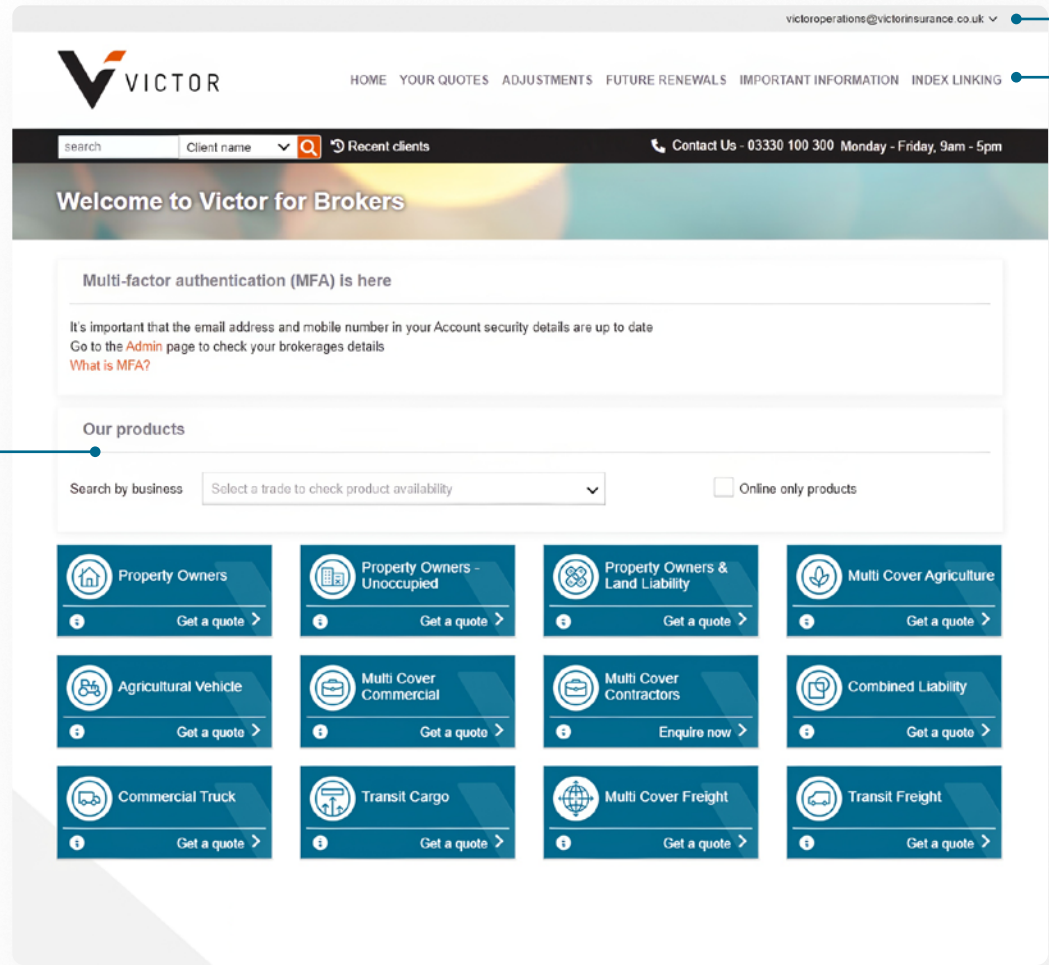
Registration or login questions?

Email: broker.support@victorinsurance.co.uk



Navigate the homepage

Products available to you will appear here. You can specify online only products or search based on trade to see the cover we can offer.



Change password, log off, administrator access.

Dashboards
Your quotes, adjustments and future renewals (see next page for more guidance).

Important information
A suite of videos to support your use of the portal and information on our finance facility.

Index linking
Adjustment figures that apply at renewal.

Dashboards

Your quotes

View your agency's new business quotes effective in the next 30 days.

Where possible, we also auto prospect any not taken up quotes and lost renewals for you, providing a zero touch method of obtaining quotes for business previously quoted by Victor. Quotes are provided based on expiring risk information so check this is correct when you retrieve the quote.

Search for specific clients by name, date or product.

View the quote, amend the risk information or mark as not taken up (NTU) if no longer needed.

Your quotes

Your current prospects. Ready to go?
Can't find the prospect you're looking for? Use the search in the top bar to find a client.

Prospect	Date Range	Product	Prospect type	Total Client Payable	
Type to search	16/09/2024 - 16/10/2024	All products	All		Filter
Clear					
HM Agriculture CBPF >	20/09/2024	Agricultural Vehicle	New Business	£5672.34 (IPT: £604.00)	View/Amend > NTU >
HM Agriculture CBPF >	25/09/2024	Multi Cover Agriculture	New Business	£259.00 (IPT: £24.00)	View/Amend > NTU >
HM Agriculture CBPF >	27/09/2024	Agricultural Vehicle	New Business	£42598.57 (IPT: £4560.38)	View/Amend > NTU >
Victor Portal >	01/10/2024	Professional Liability	New Business	£870.80 (IPT: £89.55)	View/Amend > NTU >

[Previous](#) [Next](#)

Dashboards

Adjustments and renewals

Search or filter the data for specific clients by name, policy number, product, status, or start/renewal date.

View the adjustment or renewal quote and NTU if no longer needed.

Adjustment Dashboard

View your outstanding MTA's/TMTA's effective in the next 30 days.

Can't find the adjustment you're looking for? Use the search in the top bar to find a client and start one

Client name	Product	Policy no.	Status	Start date		
Type to search	All products	Type to search	All			Filter Clear
Victor Portal	Professional Liability	ProfLiab00106775	Obtained	01/10/2024	View	NTU

Future Renewals

View your upcoming renewals effective in the next 21 days.

Renewals are displayed here from 21 days before the renewal date until today's date.
On viewing the renewal you will be able to make amendments or renew immediately.

Client name	Product	Policy no.	Status	Renewal date		
Type to search	All products	Type to search	All			Filter Clear
Victor Portal	Professional Liability	ProfLiab00106775	Obtained	04/09/2024	View	NTU

Navigating client records

Search for existing clients via client name, quote reference, policy number, or postcode. Recent clients shows all records accessed during this portal session.

Quotes, policies, adjustments, and renewals will all be visible on your client summary for you to progress with or NTU.

Client Summary for Broker Portal Test

Search Client name Recent clients Contact Us - 03330 100 300 Monday - Friday, 9am - 5pm

Quotes

Product	Quote reference	Total client payable		
Multi Cover Agriculture Effective date 23/09/2024	149756061	€ 35.00	View >	NTU >
Commercial Vehicle Effective date 23/09/2024	149756028	€ 28417.48	View >	NTU >

Policies

Product	Policy number	Expiry date	
Professional Liability Effective date 01/09/2024	ProfLiab00106804	31/08/2025	View >

Outstanding adjustments

Product	Policy Number	Total client payable		
Professional Liability Effective date 23/09/2024	ProfLiab00106804	€ 0.00	View >	NTU >

No open temporary adjustments

Renewals due

Product	Renewal reference	Total client payable
No open renewals		

Broker Portal Test >

Client ref: 91990320

[Get a quote](#) [Edit details](#)

Client name: Not provided

Address: Castlemead, Lower Castle Street, Bristol, BS1 3AG

Contact email address: Not provided

Contact phone number: Not provided

Agricultural Vehicle

Your client may also be interested in this cover

[Get Quote](#)

Want a new quote for this client? Click **Get a quote** to proceed and select your product.

Based on your client's current products, we might be able to offer related or supplementary covers to compliment your client's portfolio. Click **Get a quote** to explore these options!

Quote summary

Cover Info

Summary of sectional cover information.

Documents

Access all policy documents and email them to yourself.

Commission Override

Adjust your commission (subject to availability).

Endorsements

Summary of endorsements applied to the policy.

Ready to accept? Select your preferred payment method here

Professional Liability Quote

Cover Info

Documents >

Commission Override >

Endorsements >

Important - Please read

This summary of cover section highlights the cover provided to your client however for full terms and conditions of the policy please ensure that you refer to the documentation provided. Please note that the level of cover may be different to that requested. Any changes or additions are displayed in orange. Please review all items and contact us if you would like to discuss these or if the levels of cover are not sufficient

Cover start date	12/09/2024
Insured name	Broker Portal Test
Trade/Profession	Accountancy
Income	£100,000
Policy wording	Accountants

Professional indemnity cover

Limit of indemnity	£1,000,000
Excess	£250
Basis of limit	Any one claim

Single payment of £786.79

10 monthly payments of £78.68 (APR of 0.00%)

Accept on broker account

Pay by premium finance

Broker Portal Test >

£786.79

Total premium

Quote Ref 711995588

Total Premium

Premium (excl. IPT) £671.24

Commission £167.81 (25.00%)

Policy Fee £35.00

IPT £80.55

Cover starts 12/09/2024

Cover expires 11/09/2025

Discuss your quote

Amend

Save & exit

Summary of the premium, commission, policy fee and IPT as well as cover dates.

Send a message to underwriters to **Discuss your quote**, **Amend** any information entered or **Save & exit** to return to this at a later date.

Referrals

Some referrals will refer immediately to underwriters, however we are often able to provide you with an indication of terms subject to underwriter review.

Don't forget!

Add in any supporting information that you would like underwriters to review when preparing formal terms.

Indication of Terms

Thank you for your enquiry. We are pleased to offer you indicative terms as shown, subject to Underwriter review.

If this is of interest please click Discuss your quote and following Underwriter review we will revert with a contract certain quotation for your consideration and acceptance. If you have a Target premium that is currently less than our indicative terms then please feel free to share below and we will endeavour to support you where possible.

We are committed to recognising good quality risks and positive risk features, reflecting this in our terms so please feel free to forward any Further Information such as documents (survey report, health and safety audit etc) and/or images.

Further Information

Target premium incl. IPT (optional) £

Document Upload (optional) No file chosen

Please enter message

Broker Portal Test >

£3,200.41
Indicative premium (incl. IPT)
Subject to Underwriter review

Quote Ref:	712016029
Total Premium	<input type="button" value="-"/>
Premium (excl. IPT)	£2,826.26
Commission	£706.56 (25.00%)
Policy Fee	£35.00
IPT	£339.15 <input type="button" value="i"/>
Cover starts	13/09/2024
Cover expires	12/09/2025

If the indicative quote is of interest, make sure you click the **Discuss your Quote** button for underwriters to review the details and provide you with a formal quotation.

Policy summary

Documents

Access all policy documents and email them to yourself.

History

View high level details of policy versions previously processed.

Submit any additional information to underwriters.

The screenshot shows a web interface for a 'Professional Liability Policy'. At the top, there are tabs for 'Documents' and 'History >'. Below this is a 'Documentation' section with a heading and a paragraph: 'Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.' There are five PDF document icons: 'Statement of Fact', 'Policy Schedule', 'Important Information', 'Policy Wording', and 'Summary of Cover'. A blue button labeled 'Email documents' is positioned to the right of the 'Summary of Cover' icon. Below the documents is a section for 'Upload documents' with a text input field and a blue 'Upload Document' button. A note says 'Policy Wordings can be found [here](#)'. On the right side of the page, there is a 'Broker Portal Test >' header, a large blue number '£786.79' labeled 'Total premium', and a table of policy details. The table includes: Policy no: ProfLiab00106780, Total Premium (expandable), Premium (excl. IPT) £671.24, Commission £167.81 (25.00%), Policy Fee £35.00, IPT £80.55 (with an info icon), Cover starts 12/09/2024, and Cover expires 11/09/2025. At the bottom of this section are two buttons: a blue 'Amend policy' button and a white 'Return to client' button.

Need to adjust the policy?
Click **Amend policy**.

Payment methods

Broker account

When you choose **Accept on broker account**, an invoice will be raised to your agency and included in your statement emailed to you at the start of the following month.

Account questions? Email: victorfidops@marsh.com

Victor instalments

If available, our finance offering will be displayed on our quote summary screen along with confirmation of the APR.

Select **Pay by premium finance** to proceed and enter in the direct debit information requested.

For data protection reasons you will need to enter this information in annually.

Once set up, your client will be issued a welcome pack from our finance provider which will outline all applicable loan information.

Instalment questions? Email: broker.support@victorinsurance.co.uk

Direct debit declaration

It is a condition of using the Premium Finance facility offered by Victor Insurance that the Policyholder is provided with all necessary information and disclosure prior to giving their instructions to proceed.

Please confirm that you have provided the policyholder with the required information and disclosure found in the premium finance script [here](#), and that they have given you instructions to proceed Yes No

Bank account details

Please enter the bank account details under which the Direct Debit will be set up.

Account holder's name

Bank sort code

Bank account number

Preferred day of payment

Please confirm your Company Registration number ⓘ

Which of these descriptions most closely matches to the client's type of business?

Client contact details

Please ensure that the information provided is the clients (and that the details entered are for an authorised loan signatory).

First Name

Surname

Phone Number

Your quote reference
Ref. 148472896

10 monthly payments of
£ 78.68

APR 0.00%

Deposit of £ 0.00

Total amount payable £ 786.79*

* inclusive of £80.55 Insurance Premium Tax

FAQs



How do I login for the first time?

Visit victorforbrokers.co.uk and click 'login'. Enter your username and password.

What do I do if I've forgotten my password or my account is locked? Please click the 'reset your password' link on the login page. If resetting your password does not resolve the issue, please email broker.support@victorinsurance.co.uk

What do I do if I've forgotten my login ID?

Your login ID is the email address used to set up your account.

Can I get a Victor for Brokers demo for me and/or my team? Absolutely! Please reach out to your business development contact to arrange this.

My clients renewal is due in 25 days but I can't find the terms? Our renewal terms are available 21 days ahead of renewal as standard. If you need these earlier than this, please reach out to our underwriters to discuss further.

How do I cancel a policy? Cancellations need to be agreed with underwriters and therefore cannot be processed on the portal. Please reach out to our underwriting teams who will be happy to assist you further.

I need to backdate a quote but the portal isn't allowing me to do so? Backdated cases need to be agreed with underwriters before cover can proceed. Please reach out to our underwriting teams who will be happy to assist you further.

I cannot locate an existing client record on the portal? Please reach out to broker.support@victorinsurance.co.uk for further assistance here so that we can check your access and the agency attached to the client record.

Why don't I have the option to amend a policy/start an MTA? This is usually because there is already an in-flight business event in progress (either an adjustment or renewal). Please reach out to our underwriters for further assistance here and we can assist you with processing any changes.

I have a policy with EL cover included and the portal won't accept my clients ERN? It is likely that the reference being entered is in the incorrect format (usually an accounts reference as opposed to an ERN). Please follow the guidance on the correct format and reach out to our underwriters if you continue to experience issues.



Customer support

Contact our underwriting teams

Reach us on 03330 100 300 if you require assistance.

UNDERWRITING TEAM	PHONE	EMAIL
Real estate and SME	Option 1	property@victorinsurance.co.uk
Motor	Option 2	motor@victorinsurance.co.uk
Agriculture	Option 3	agriculture@victorinsurance.co.uk
Not for profit	Option 4	thirdsector@victorinsurance.co.uk
Golf	Option 4	golf@victorinsurance.co.uk
Commercial combined	Option 5	commercial@victorinsurance.co.uk
Liability	Option 6	liability@victorinsurance.co.uk
Cargo and logistics	Option 7	transit@victorinsurance.co.uk
Financial lines	Option 8	professional@victorinsurance.co.uk



How do I report issues with victorforbrokers.co.uk?

Please send our underwriters as much information as possible, including:

- Date and time of error
- Login username
- Where you were in the portal journey when the error occurred
- Error message reference

Logging in

If you are a first time user or experience issues logging in, email: broker.support@victorinsurance.co.uk for assistance.

Billing questions

Email: victorfidops@marsh.com

Visit us at victorinsurance.co.uk to learn more.

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This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.

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