

# Portal walk-through

<https://agents.alanboswell.com/login>



ALAN  
BOSWELL  
GROUP

Landlords  
Lettings  
Property

1) Log-In

2

Dashboard

3

Buy New

4

Order  
Summary

5

Manage  
Policies

6

Cancel  
Policies

7

Renew  
Policies

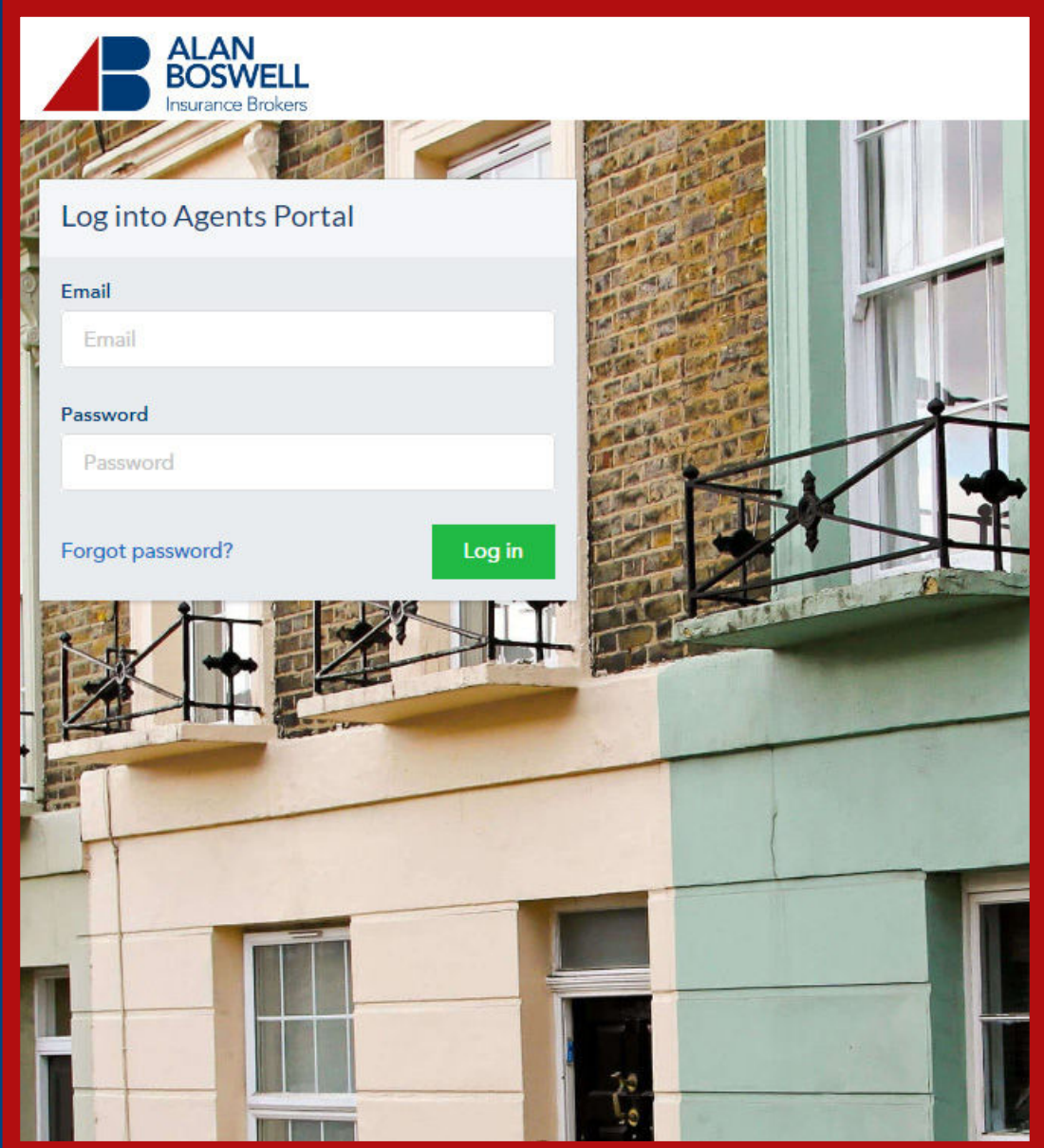
8

Make a  
Claim

## 1) Log-in:

Each company has a single account, however, multiple log-ins can be provided if required.

Please speak to a member of the team if you require additional log-ins.



The screenshot shows the Alan Boswell Insurance Brokers logo at the top left. Below it is a white login form titled "Log into Agents Portal". The form contains two input fields: "Email" and "Password". Below the password field is a link for "Forgot password?". A green "Log in" button is positioned to the right of the password field. The background of the page is a photograph of a multi-story brick building with a balcony and a window.

1  
Log-In

## 2) Dashboard:

Once logged in, you will be presented with your dashboard. Here you can manage your policies, make a claim, download your documents, purchase new policies, and make a payment.

2) Dashboard

3  
Buy New

4  
Order  
Summary

5  
Manage  
Policies

6  
Cancel  
Policies

7  
Renew  
Policies

8  
Make a  
Claim

The screenshot displays the Alan Boswell Insurance Brokers dashboard. At the top, there is a navigation bar with a user profile icon and a 'Logout' link. Below this is the company logo and two main action buttons: 'Buy new' (green) and 'Make a payment' (white with a blue border). A search bar labeled 'Search Addresses' is positioned above a filter bar. The filter bar includes radio buttons for 'All', 'Live', 'Ending soon', and 'Cancelled', along with a checkbox for 'Hidden/Expired'. There are also links for 'Additional Services & FAQs' and 'Export Policy List'. The main content area features a table with the following columns: Start, End, Property Address, Policy, Status, Schedule, CoG, and a 'Manage' dropdown menu. The table lists four policies, all with a status of 'Ready to renew'.

Start	End	Property Address	Policy	Status	Schedule	CoG	Manage
15-08-2023	14-08-2024	Po Box 3161, CF30 0FB	Aviva Legal Expenses and Rent Protection (Reposit)	Ready to renew			Manage
17-08-2023	16-08-2024	D, Cauldhame, Kippen, FK8 3JB	Aviva Legal Expenses and Rent Protection	Ready to renew			Manage
18-08-2023	17-08-2024	Po Box 301, HA5 4XN	Aviva Legal Expenses and Rent Protection	Ready to renew			Manage
22-08-2023	21-08-2024	Po Box 673, SA1 9NL	Aviva Legal Expenses and Rent Protection (Reposit)	Ready to renew			Manage

1  
Log-In

2  
Dashboard

3) Buy New

4  
Order  
Summary

5  
Manage  
Policies

6  
Cancel  
Policies

7  
Renew  
Policies

8  
Make a  
Claim

## 3) Buy New:

To purchase a new policy you enter the property address and choose the date cover is required from. Please note, it is not possible to backdate cover.

Select the product required and add the selected product to your basket.

< Buy New

What is the address of the rental property?

Start typing your address and select from the list

[Enter your address manually](#)

When would you like the cover to start?

16/08/2024 **Today**

Now choose the cover you need

Aviva Legal Expenses [Click for Product Information](#)

Duration	Premium	£53.57
<b>12 Months</b>	IPT	£6.43
	<b>Total</b>	<b>£60.00</b>

Not available if Aviva Legal Expenses and Rent Protection or Aviva Legal Expenses & Rent Protection (6 months payments) or Aviva Legal Expenses and Rent Protection (Reposit) selected

**Add to basket**

1  
Log-In

2  
Dashboard

3  
Buy New

4) Order  
Summary

5  
Manage  
Policies

6  
Cancel  
Policies

7  
Renew  
Policies

8  
Make a  
Claim

## 4) Order Summary:

Please read the 'Assumptions and Obligations' document and confirm you understood your responsibilities. Press 'Buy Now' to complete your purchase!

Please do not arrange payment until you have received your invoice on the 15th of the following month.

### Order Summary

Aviva Legal Expenses and Rent Protection (12 Months) (£2,500) £185.00

**Total £185.00**

I confirm the following:

- This property is managed or owned by us (the policyholder);
- There are no known incidents that could give rise to a claim under this policy and no section notices have been issued in the last 3 months;
- The tenants meet the acceptance criteria or a referral has been accepted by Alan Boswell Group;
- I have read and understood the relevant IPID and Policy Wording;
- I understand my obligations as a letting agent, as detailed in the Assumptions and Obligations.

I confirm I have read the requirements and understand my responsibilities.

Buy Now

### Purchase Complete

Your purchase is confirmed, you will receive an email with your documents

OK

1  
Log-In

2  
Dashboard

3  
Buy New

4  
Order  
Summary

5) Manage  
Policies

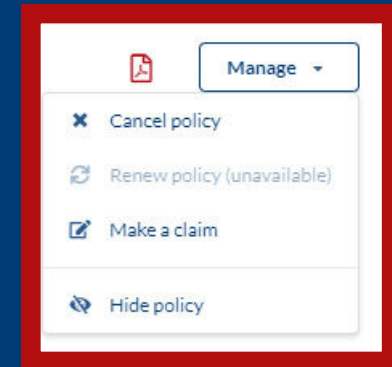
6  
Cancel  
Policies

7  
Renew  
Policies

8  
Make a  
Claim

## 5) Managing Your Policies:

After a successful purchase, you can view your policies, download your policy Schedule and Contract of Guarantee (CoG), and manage the policy from the dashboard.



The screenshot shows the Alan Boswell Insurance Brokers dashboard. At the top, there is a navigation bar with the company logo, a search bar for addresses, and filters for policy status (All, Live, Ending soon, Cancelled, Hidden/Expired). There are also links for 'Additional Services & FAQs' and 'Export Policy List'. Below the navigation bar is a table of policies. The first policy is highlighted with a red vertical bar on the left. The table has columns for Start, End, Property Address, Policy, Status, Schedule, and CoG. The first row shows a policy starting on 15-08-2023 and ending on 14-08-2024, located at Po Box 3161, CF30 0FB. The policy is 'Aviva Legal Expenses and Rent Protection (Reposit)' and is 'Ready to renew'. There are icons for downloading the Schedule and CoG, and a 'Manage' dropdown menu.

Start	End	Property Address	Policy	Status	Schedule	CoG
15-08-2023	14-08-2024	Po Box 3161, CF30 0FB	Aviva Legal Expenses and Rent Protection (Reposit)	Ready to renew		



1  
Log-In

2  
Dashboard

3  
Buy New

4  
Order  
Summary

5  
Manage  
Policies

6) Cancel  
Policies

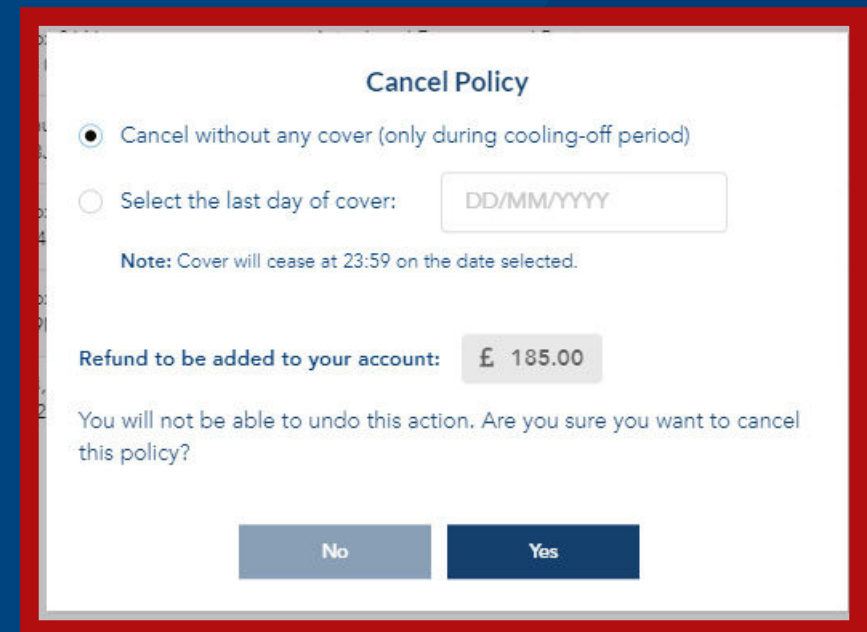
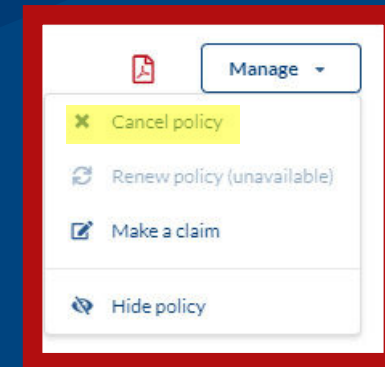
7  
Renew  
Policies

8  
Make a  
Claim

## 6) Cancelling a Policy:

In order to cancel a policy, select 'Manage' and choose 'Cancel policy' from the drop down. Choose the date on which the policy is to be cancelled from.

If cancelled within the first 14 days of the policy, you will be issued a full refund. Any date after this will be credited on a pro-rata basis and will appear on the following months

A screenshot of a 'Cancel Policy' form. The form has two radio button options: 'Cancel without any cover (only during cooling-off period)' (selected) and 'Select the last day of cover: DD/MM/YYYY'. Below the options is a note: 'Note: Cover will cease at 23:59 on the date selected.' The form also displays 'Refund to be added to your account: £ 185.00'. At the bottom, there is a question: 'You will not be able to undo this action. Are you sure you want to cancel this policy?' with 'No' and 'Yes' buttons.

1  
Log-In

2  
Dashboard

3  
Buy New

4  
Order  
Summary

5  
Manage  
Policies

6  
Cancel  
Policies

7) Renew  
Policies

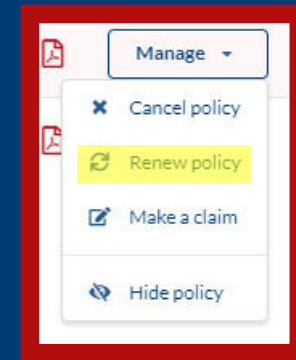
8  
Make a  
Claim

## 7) Renewing a Policy:

You will have the option to renew your policy 21 days before the renewal date. Select 'Renew policy' from the 'Manage' drop down and you will be taken to the purchasing screen.

Select the level of cover required and complete your purchase.

If your policy has passed its expiry date you will be unable to complete the purchase. In this case, you will need to 'Buy new' and re-purchase the policy from today's date. If the previous policy expired less than 10 days ago, you will not be subject to the claim exclusion period.



Now choose the cover you need

Aviva Legal Expenses [Click for Product Information](#)

Duration	Premium	£53.57
<b>12 Months</b>	IPT	£6.43
	<b>Total</b>	<b>£60.00</b>

Not available if Aviva Legal Expenses and Rent Protection or Aviva Legal Expenses & Rent Protection (6 months payments) or Aviva Legal Expenses and Rent Protection (Reposit) selected

**Add to basket**

Aviva Legal Expenses and Rent Protection [Click for Product Information](#)

Duration	Premium	£120.54
<b>12 Months</b>	IPT	£14.46
	<b>Total</b>	<b>£135.00</b>

Monthly Rental Variant

<b>£500</b>	£2,500	£3,000	£5,000
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Not available if Aviva Legal Expenses or Aviva Legal Expenses & Rent Protection (6 months payments) or Aviva Legal Expenses and Rent Protection (Reposit) selected

**Add to basket**



1  
Log-In

2  
Dashboard

3  
Buy New

4  
Order  
Summary

5  
Manage  
Policies

6  
Cancel  
Policies

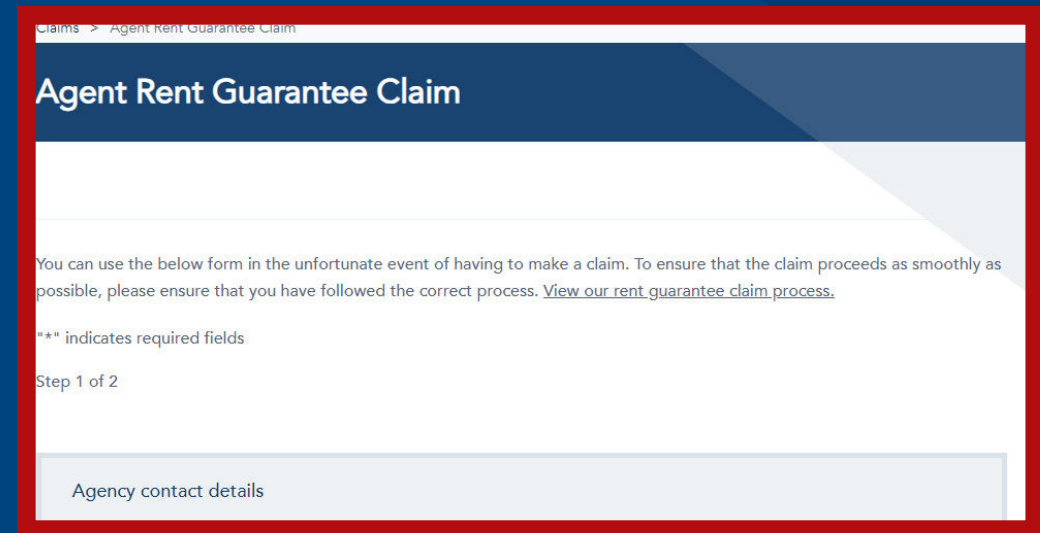
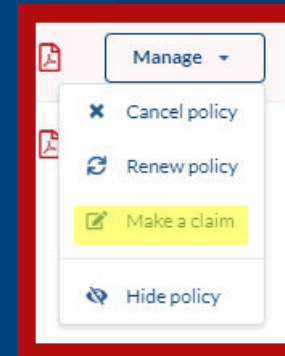
7  
Renew  
Policies

8) Make a  
Claim

## 8) Making a Claim:

In order to make a claim go to the '*Manage*' drop down and select '*Make a claim*'.

You will then be redirected to the claim submission page. From here you will be required to fill out all the requested information and provide all the relevant supporting documentation. This is the most efficient way for your claim to be processed.

A screenshot of a web application's 'Agent Rent Guarantee Claim' submission page. The page title is 'Agent Rent Guarantee Claim'. Below the title, there is a paragraph of text: 'You can use the below form in the unfortunate event of having to make a claim. To ensure that the claim proceeds as smoothly as possible, please ensure that you have followed the correct process. [View our rent guarantee claim process.](#)'. Below this text, there is a note: '\*\*' indicates required fields'. The page is labeled 'Step 1 of 2'. At the bottom, there is a form field labeled 'Agency contact details'.

**Need more help? Contact us:**

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[lettings@alanboswell.com](mailto:lettings@alanboswell.com)