

Allianz Trade Online Guide



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Getting started with Allianz Trade Online

Allianz Trade Online is our online service. This means you can keep an eye on your credit insurance policy around the clock.

In this short guide, you will find the most important information to get started. More information with practical tips and how our credit insurance works can be found in our customer manual.

If you have any questions, please contact your account manager.

Your first registration

When you first register, you will receive an automatic email from us to create your password.

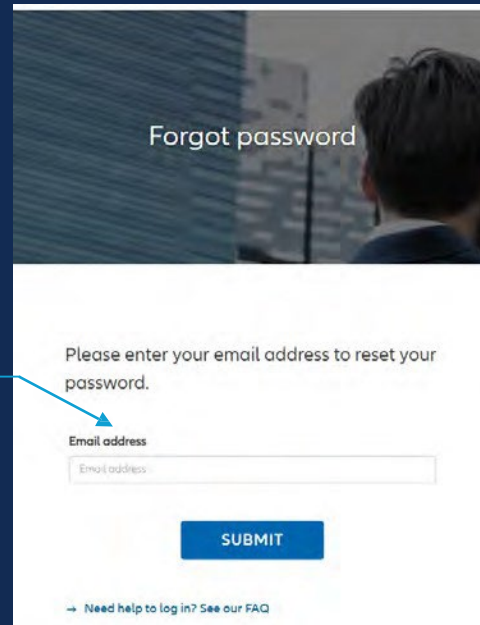
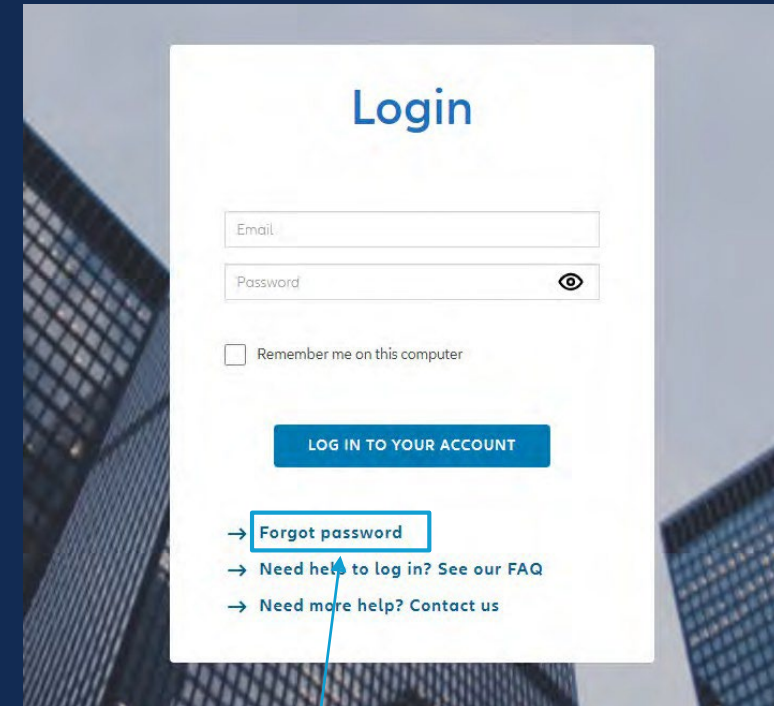
Please click on the “Set password” button in the email. A page will then open in your browser. There, you will be able to set a password so that you can access the system. Please close this page after setting the password.

To log in for the first time, please open the login page again:
<https://online.allianz-trade.com>

Tips:

- Adding the page as a favourite in your browser: please manually add the following link as a favourite in your browser: <https://online.allianz-trade.com>
- Setting a new password: use the “Forgot password” function on the login page. You will promptly receive an email to reset your password.

Add
Email address

Forgot Password Function

Getting to know Allianz Trade Online

Click on the question mark icon in the top right menu to start a short introduction to Allianz Trade Online.

The introduction takes you through the most important functions step by step.

Note: When you log in for the first time, the introductory tour starts automatically.

Introduction

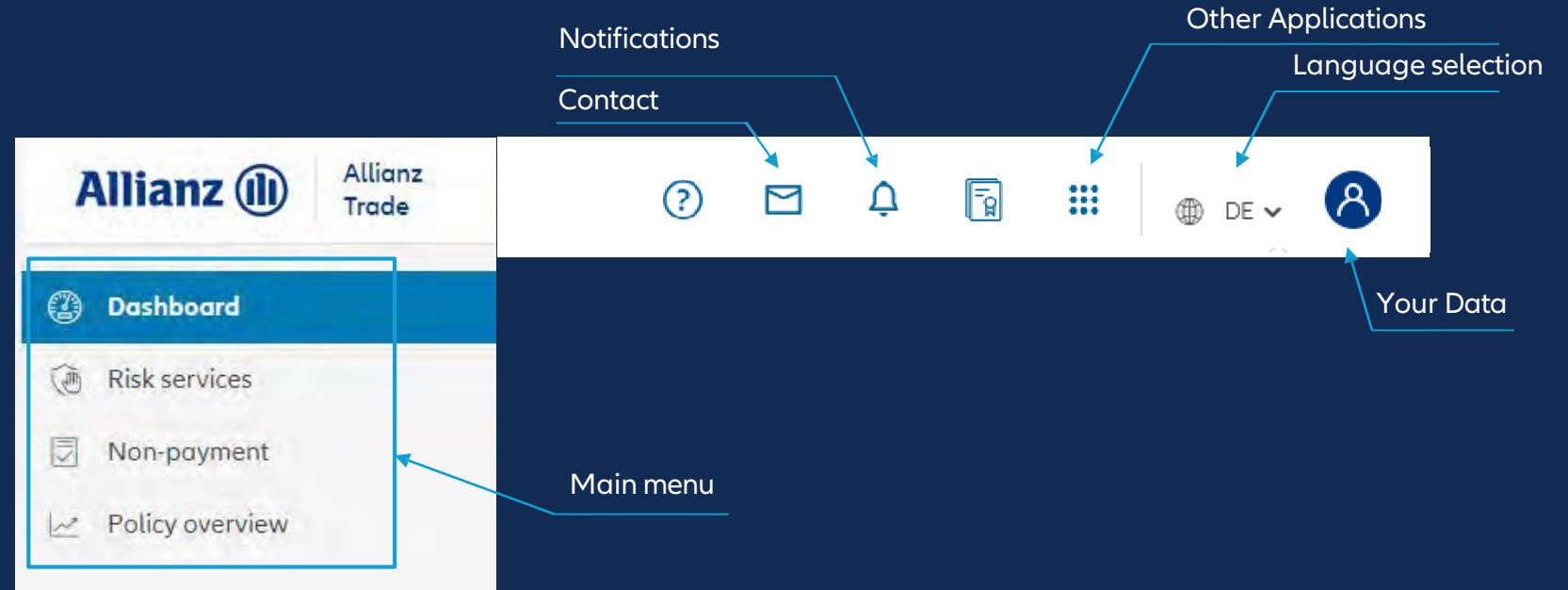


The Menu

The main menu is on the left. From there, you can access your dashboard, credit decisions and your policy overview.

You can find additional functions at the top of the navigation. We have already presented the introduction and the library features.

- **Contact:** Do you have a request? Feel free to send us a message.
- **Notifications:** We inform you about updates, e.g. when we have replied to your message.
- **Quick links:** Depending on your policy, here you can switch to other applications.
- **Language selection:** Select your desired language here.
- **Your data:** Here you can change your contact information, select your preferred policy and log out of Allianz Trade Online.



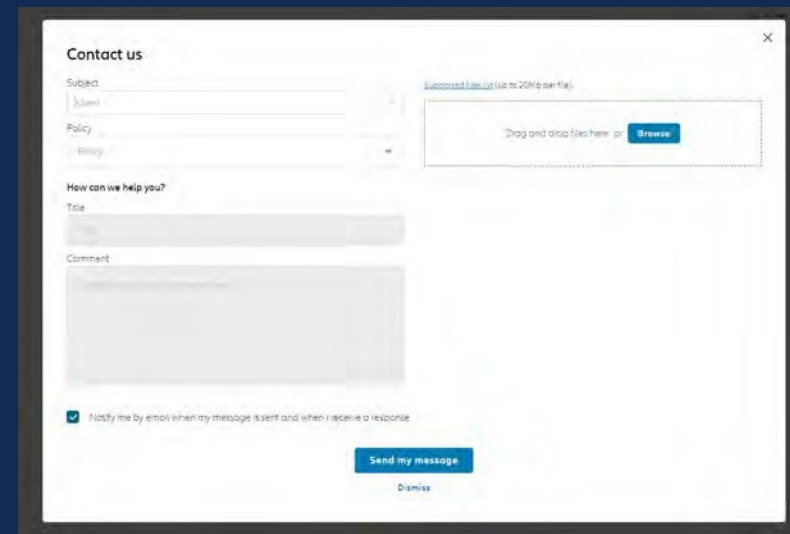
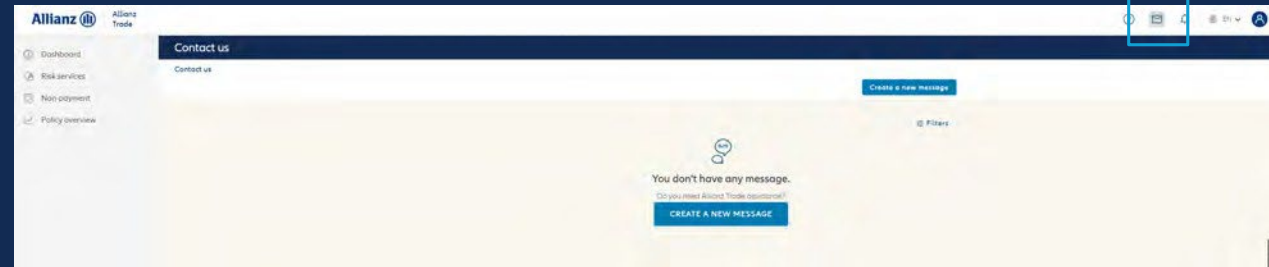
Contact us

Do you have a request? Then please contact us using the contact symbol in the navigation at the top right. We will process your request and get back to you as quickly as possible.

You can use the “Create a new message” button to send us a message. You can also attach documents to a message (max. 20 MB per file, multiple attachments possible).

For messages that have already been sent, you can view the status of your enquiries via the contact function.

Contact



The dashboard

Credit limit decisions and open applications

The screenshot displays the Allianz Trade dashboard for user Sabine. The main content area is titled 'Credit limit' and features a table of decisions and an 'Overview' panel. The table includes columns for Customer name, Grade, EHID, Country, Decision date, Requested amount, Global status, and Global amount. A row shows a decision for 'Noble expo' with a 'Partial Cover' status. The Overview panel displays metrics for Acceptance rate (95%), Reserve left (55), and Number of limits (1). Below the table, a notification states '1 proactive alerts are affecting your credit limits (last 30 days)'. The dashboard also includes sections for Customer search, Quick links (Request, Report a non-payment), Latest notifications, and Latest messages (Create a new message).

Customer name	Grade	EHID	Country	Decision date	Requested amount	Global status	Global amount
Noble expo		F181131	BE	30 Oct 2023	€150,000	Partial Cover	€14,544

Business partner search

Quick links to
Customer Overview
and Report a claim

Latest notifications

Latest messages and
create new message

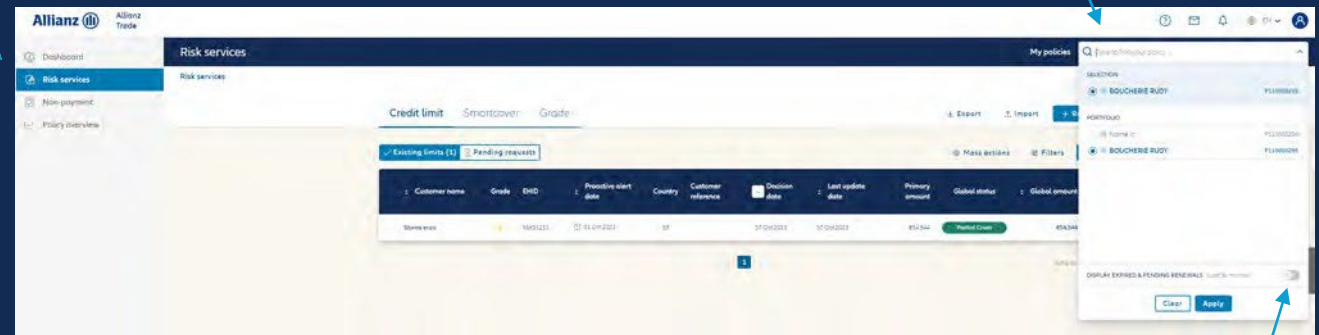
Manage your credit limit

Select the policy you want in the top right. You can also select multiple policies for a combined overview.

Your active policies are listed directly in the selection. Please select the grey button to view inactive policies.

Select in the "Risk services" menu

Select your policies



View inactive policy

Filter and sort credit limits

You can view your existing insurance amounts as well as your pending requests.

There are a variety of filter options to help you quickly find the credit limits you want, e.g.:

- Customers' name
- Customer reference
- Country
- EHID
- Decision status (full acceptance, partial acceptance, no insured sum, inactive insured sums)
- Period (used to find a limit if there has been a change)
- Proactive alert

You can also sort the displayed credit decisions, e.g. in descending and ascending order according to the decision date, the insured amount or the customer name.

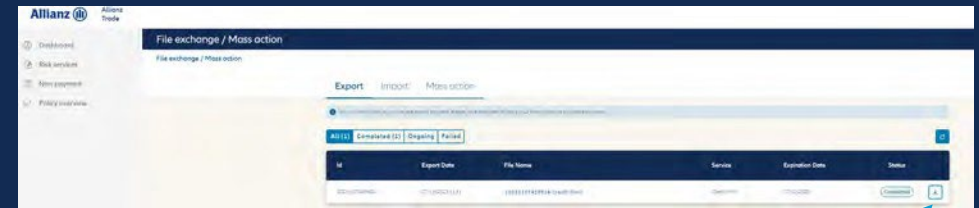
The screenshot displays the Allianz Trade Risk services interface. The main content area is titled 'Risk services' and shows a table of credit limits. The table has columns for 'Customer name', 'Customer reference', 'Country', 'Decision date', 'Limit update date', 'Primary amount', 'Global status', and 'Insured amount'. The table is currently filtered to show 'Existing limits (2)', 'Pending requests (1)', and 'Strategic limits (1)'. A 'Filter' dropdown menu is open, showing options like 'Customer name', 'Customer reference', 'Country', 'Decision date', 'Limit update date', 'Primary amount', and 'Global status'. A 'Sort by' dropdown menu is also visible, showing options like 'Decision date (DESC)', 'Limit update date', 'Primary amount', and 'Global status'. The interface includes a sidebar with navigation options like 'Dashboard', 'Risk services', 'Non-payment', 'Policy overview', 'Policy administration', and 'Policy performance'. The top right corner shows 'Allianz Trade' and 'Risk services'.

Exporting credit limits

You can use the export function to download the list of credit limits as a file. By clicking “Yes, export”, you will receive an email with a download link as soon as your request has been processed. The file creation may take a few minutes.

In addition to the link in the email, you can download the file using the download icon in the export view.

Export function



Download the file here

Details about the credit decision

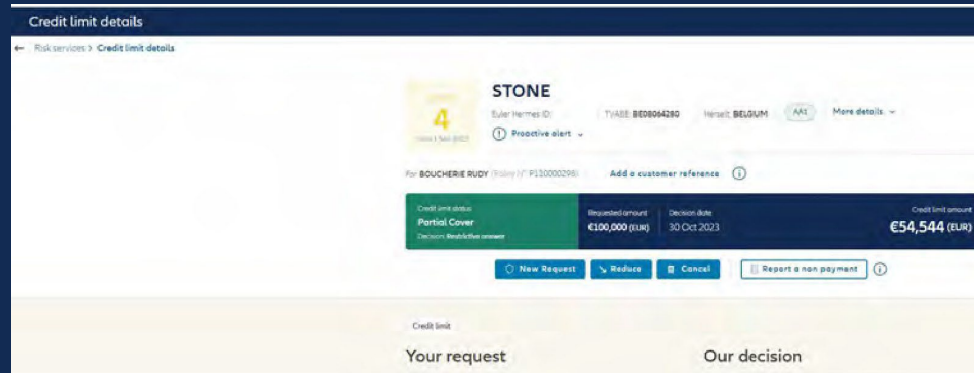
Click on the desired credit limit decision in the list to view further details.

Here, you can see all information about the credit limit decision:

- Amount of the insured sum
- Decision (e.g. full acceptance, partial acceptance, provisional acceptance, rejection)
- Date of decision and change

Here, you can also submit a new application, reduce or delete the insured sum.

If a credit limit application is rejected, the reason will be given. If possible, you have the possibility to ask for a CAP / CAP+ limit in case of restrictive credit decision.



Credit limit details

Risk services > Credit limit details

STONE
Euler Hermes ID: T1ABE: BE0004280 | Hermit: BELGIUM | AAT | More details

Proactive alert

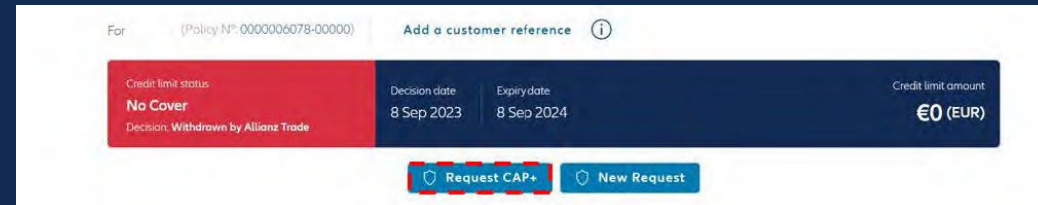
For BOUCHERIE RUDY (Policy N° P130000298) | Add a customer reference

Credit limit status	Requested amount	Decision date	Credit limit amount
Partial Cover <small>Decisions: Ready for review</small>	€100,000 (EUR)	30 Oct 2023	€54,544 (EUR)

New Request | Reduce | Cancel | Report a non payment

Credit limit

Your request | Our decision



For (Policy N°: 0000006078-00000) | Add a customer reference

Credit limit status	Decision date	Expiry date	Credit limit amount
No Cover <small>Decision: Withdrawn by Allianz Trade</small>	8 Sep 2023	8 Sep 2024	€0 (EUR)

Request CAP+ | New Request

Find your customer

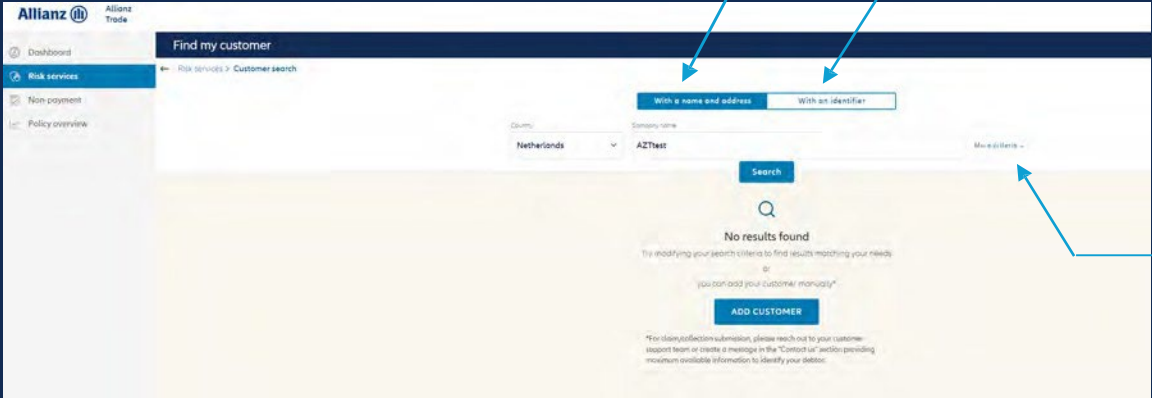
You can access the business partner search either via the "Dashboard" or via "Risk Services" and then by clicking on the button "Request".

Here, you can search for your customer using various criteria. The search can be carried out using different identification numbers. Recently viewed companies are also displayed.

Select the company you want from the suggestions. Click on the right arrow for more details. Click on "Select" to apply for an insurance amount in the next step.

Can't find your business partner?

- Try using different search criteria, or
- Select "Add customer" to register it



The screenshot shows the 'Find my customer' page in the Allianz Trade system. The page has a dark blue header with the Allianz Trade logo and navigation tabs for 'Dashboard', 'Risk services', 'Non payment', and 'Policy overview'. The main content area is titled 'Find my customer' and contains a search form. The search form has two tabs: 'With a name and address' (selected) and 'With an identifier'. Below the tabs, there are fields for 'Country' (set to 'Netherlands') and 'Company name' (containing 'AZTest'). A 'Search' button is located below the company name field. To the right of the search form, there is a 'More filters' link. Below the search form, a message states 'No results found' and provides instructions on how to modify search criteria or add a customer manually. An 'ADD CUSTOMER' button is also present. Three blue arrows point to specific elements: one to the 'With a name and address' tab, one to the 'With an identifier' tab, and one to the 'More filters' link.

Search with name and address

Search with identification number

Further search criteria

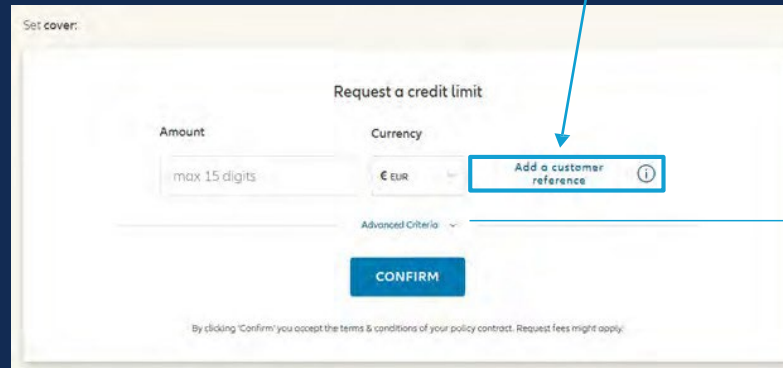
Submit a new credit limit request

First select the policy and then enter the desired amount. By selecting "Advanced criteria", you can use additional criteria and add information.

You can also add a customer reference (max. 20 characters).

After making your entry, you will be asked to confirm your request again.

Add customer
reference



Set cover:

Request a credit limit

Amount: max 15 digits

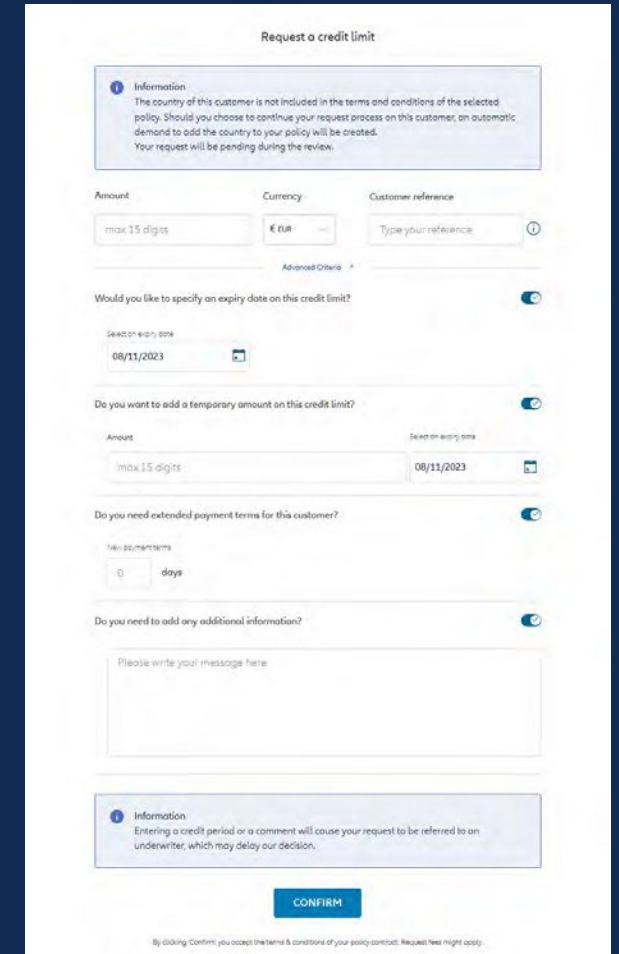
Currency: € EUR

Add a customer reference ⓘ

Advanced Criteria

CONFIRM

By clicking 'Confirm' you accept the terms & conditions of your policy contract. Request fees might apply.



Request a credit limit

Information
The country of this customer is not included in the terms and conditions of the selected policy. Should you choose to continue your request process on this customer, an automatic demand to add the country to your policy will be created. Your request will be pending during the review.

Amount: max 15 digits

Currency: € EUR

Customer reference: Type your reference ⓘ

Advanced Criteria

Would you like to specify an expiry date on this credit limit?

Select expiry date: 08/11/2023 ⓘ

Do you want to add a temporary amount on this credit limit?

Amount: max 15 digits

Select expiry date: 08/11/2023 ⓘ

Do you need extended payment terms for this customer?

14:00:00 terms: 0 days

Do you need to add any additional information?

Please write your message here

Information
Entering a credit period or a comment will cause your request to be referred to an underwriter, which may delay our decision.

CONFIRM

By clicking 'Confirm' you accept the terms & conditions of your policy contract. Request fees might apply.

Report your turnover

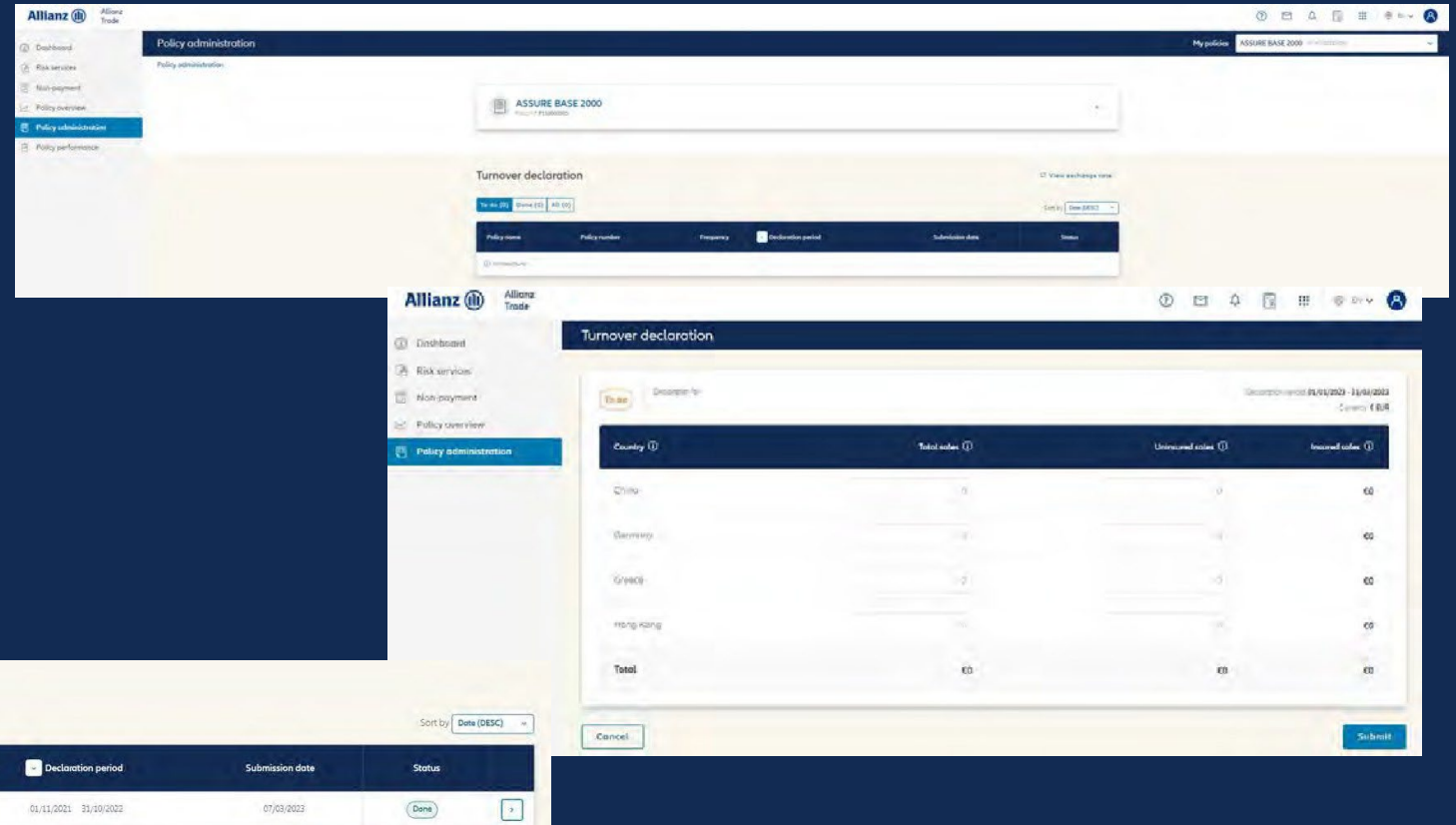
You can access the turnover/balance declaration via "Policy Administration" in the menu at the left.

Select a policy number.

In the relevant reporting period and desired list, click on "Report" to enter the turnover or balances.

Please enter total and uninsured turnover or balances. For more tips on determining amounts, see the row and column headings.

After submitting a report, the status changes from "Open" to "Done".



The screenshot shows the Allianz Trade Policy Administration interface. The top navigation menu includes Dashboard, Risk services, Non-payment, Policy overview, Policy administration (selected), and Policy performance. The main content area displays the "Turnover declaration" form for policy "ASSURE BASE 2000". The form includes a "Report" button and a table for entering data.

The table below shows the data entered in the "Turnover declaration" form:

Country	Total sales	Uninsured sales	Insured sales
China	0	0	00
Germany	0	0	00
Greece	0	0	00
Hong Kong	0	0	00
Total	00	00	00

Below the table, there are "Cancel" and "Submit" buttons. The "Submit" button is highlighted in blue.

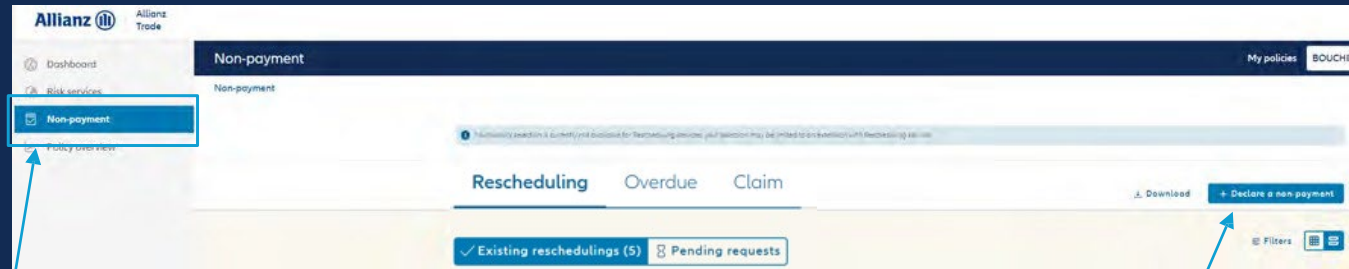
The bottom part of the screenshot shows a table of turnover declarations with the following data:

Policy name	Policy number	Frequency	Declaration period	Submission date	Status
	1454	Annually	01/11/2021 - 31/10/2022	07/03/2022	Done

Request an extension period

You can request an extension period in the non-payment section in case you want to amend the due date of a single invoice, and a rescheduling in case of a repayment plan.

Please fill in the mandatory fields to submit an extension period request or a rescheduling request.



Menu Non-payment

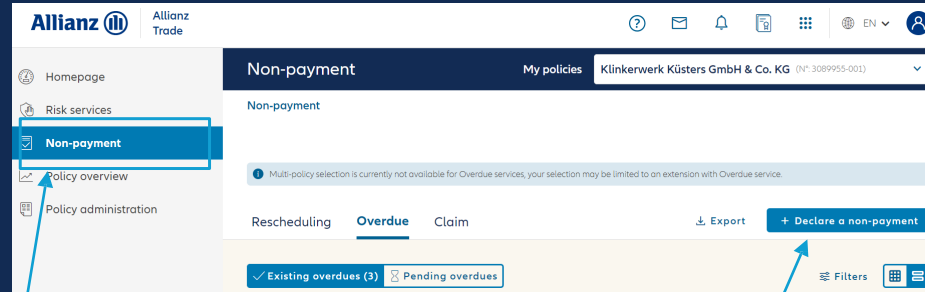
Declare a non-payment

Request extension

Report an overdue

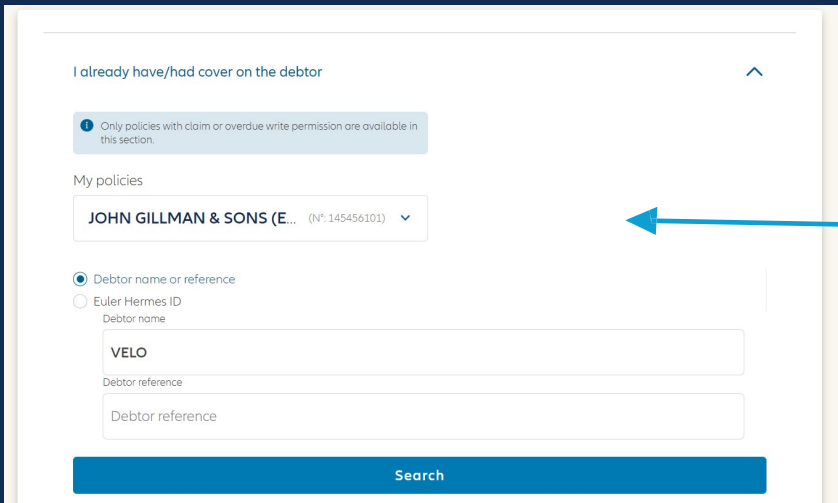
You have to report an overdue in the non-payment section when an invoice has not been paid on time. This is also where you can report full or partial payment or transfer the overdue to a claim.

Please fill in the mandatory fields to submit an extension period request or a rescheduling request.

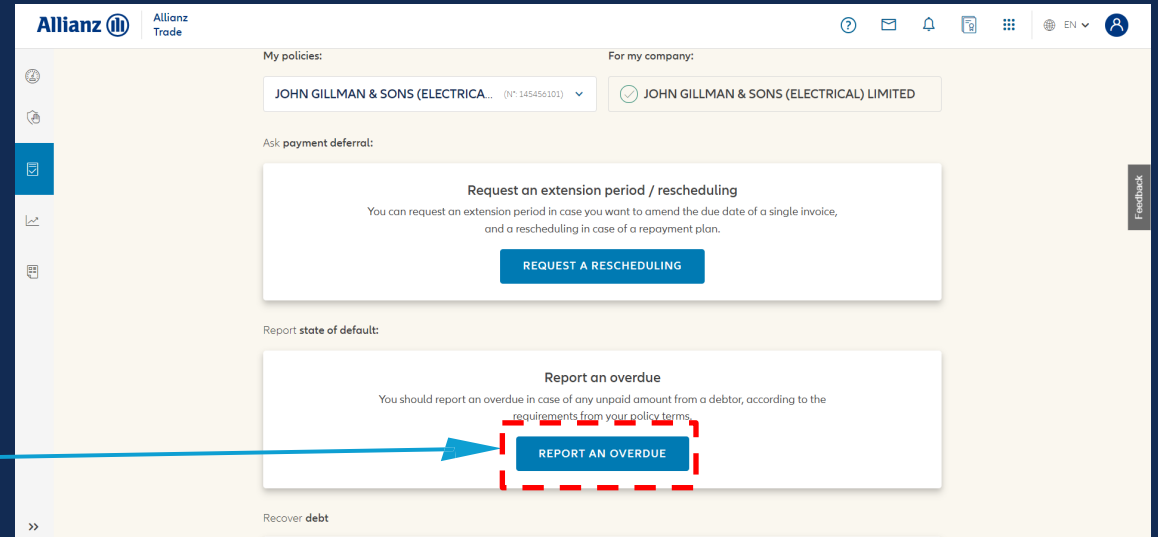


Non-payment Menu

Declare a non-payment



Find debtor



Report overdue

Report a claim/debt collection

Make your first selection from the menu on the left "Non-Payment" and then your policy.

Report a claim by clicking on "Declare a non-payment".

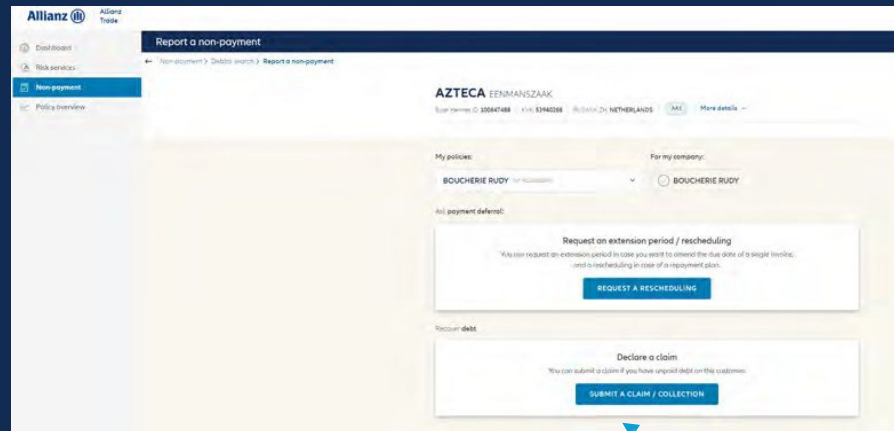
Search for your debtor using the company search. Before you start searching, make sure you have insurance coverage. Choose "Submit a claim/collection".

In the next step, provide all information about your claim and, if applicable, the debtor.

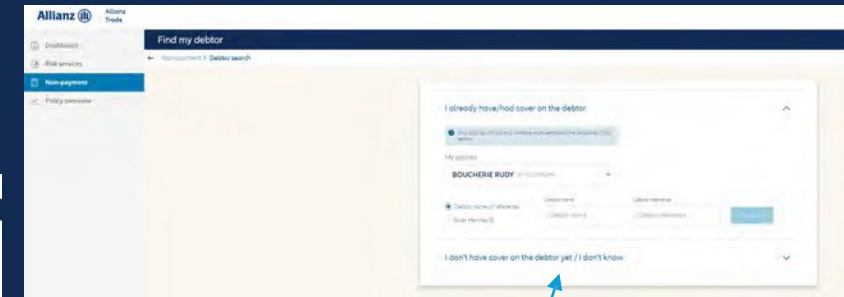
Provide all relevant details about your invoice as well as your contact information. Submit your report in the last section.



Declare a non-payment



Submit a claim/collection



Search and select debtor

Policy overview

By selecting "Policy Overview" under the main menu, you can gain access to an overview with a variety of clearly presented statistics.

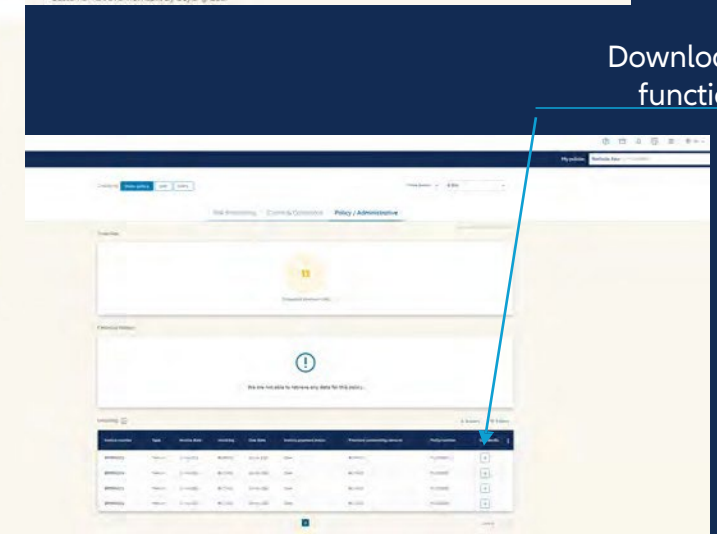
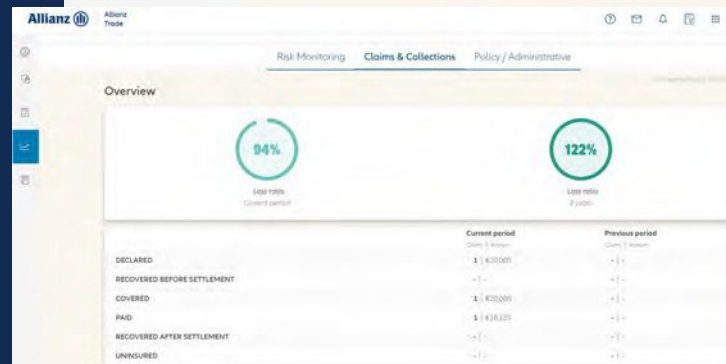
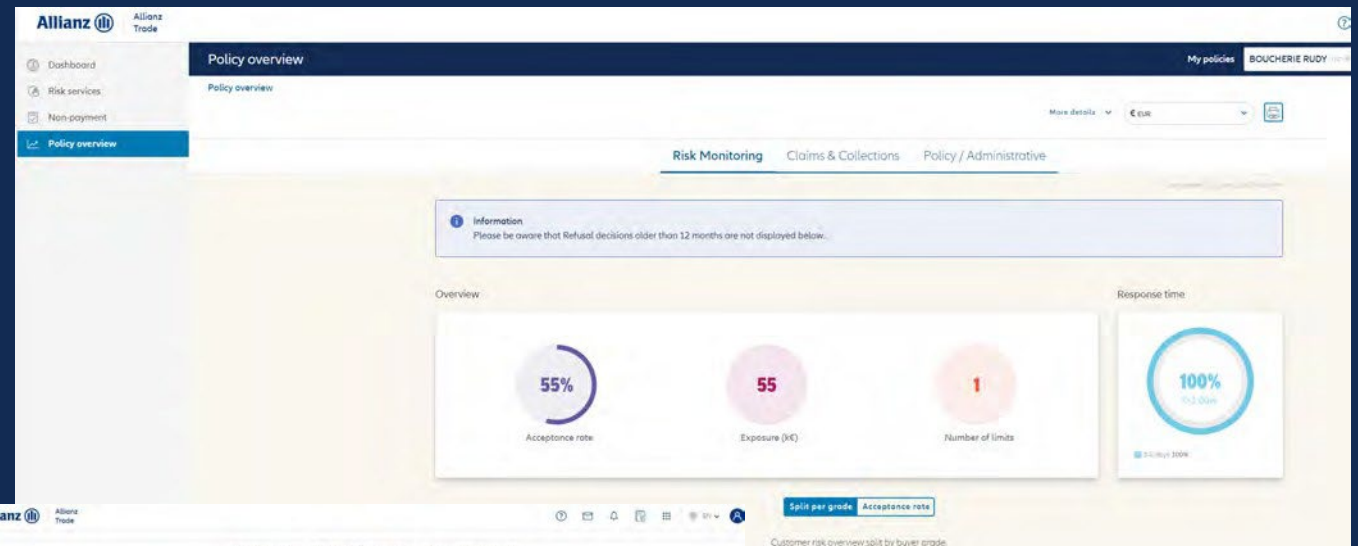
Here, under "Risk Monitoring", you can see, for example, the acceptance rate of your limit requests, the number of active decisions and a list of your top 10 insured amounts.

Under the "Claims and Collections" tab you can view your loss ratio and last 10 cases, as well as the respective claim status.

You can see and export the premium invoices, refund / credit notes, credit limit (with details available) request fees and collection fees.

The "Policy/Administrative" tab shows your policy statistics for your turnover/balance reports as well as premiums & fees.

The invoice payment status is indicated and the PDF document can be downloaded by 1 click.



Download function

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Continue in our support center

Access short introduction videos (just a few minutes each) with hands-on instructions and help you complete the setup with confidence.

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