



# Partners & Client Portal

## Setup & Guidance Notes



We'd like to introduce you to the **Partners& Client Portal**.

The portal provides you with **24/7 access to your policy information and personal details at a time that's convenient for you.**

Through the portal you can:

- ✓ **Obtain the documents you need**
- ✓ **Notify us of changes, or request a call back**
- ✓ **Pay your bill by credit / debit card**

A great benefit of this service is that it's real-time, so if we make a document or invoice available for you online, it'll be there immediately. In addition, you'll be able to use the service on all devices, including mobile phones and tablets, anytime, anywhere.

If you would like to take advantage of the Partners& Client Portal, please contact your personal **Client Executive** and we'll take you through the next steps.

If you get stuck, rest assured we've got total control of your account and can assist with any issues or queries.

In the meantime, the following pages walk you through what's available when you sign up.

### Step1. Register your Partners& account

Once we've discussed this service with you, we'll send you an email asking you to verify your email address.

Simply click the link and enter your email address to complete this step. Then, you will be prompted to create a password.

Please use a secure password and ensure it is kept safe.



#### Register with Partners&

This is your invitation to verify your **Partners&** account.

[Simply click here and enter your email address when prompted.](#)

Once verified, your account will allow you to access your documents.

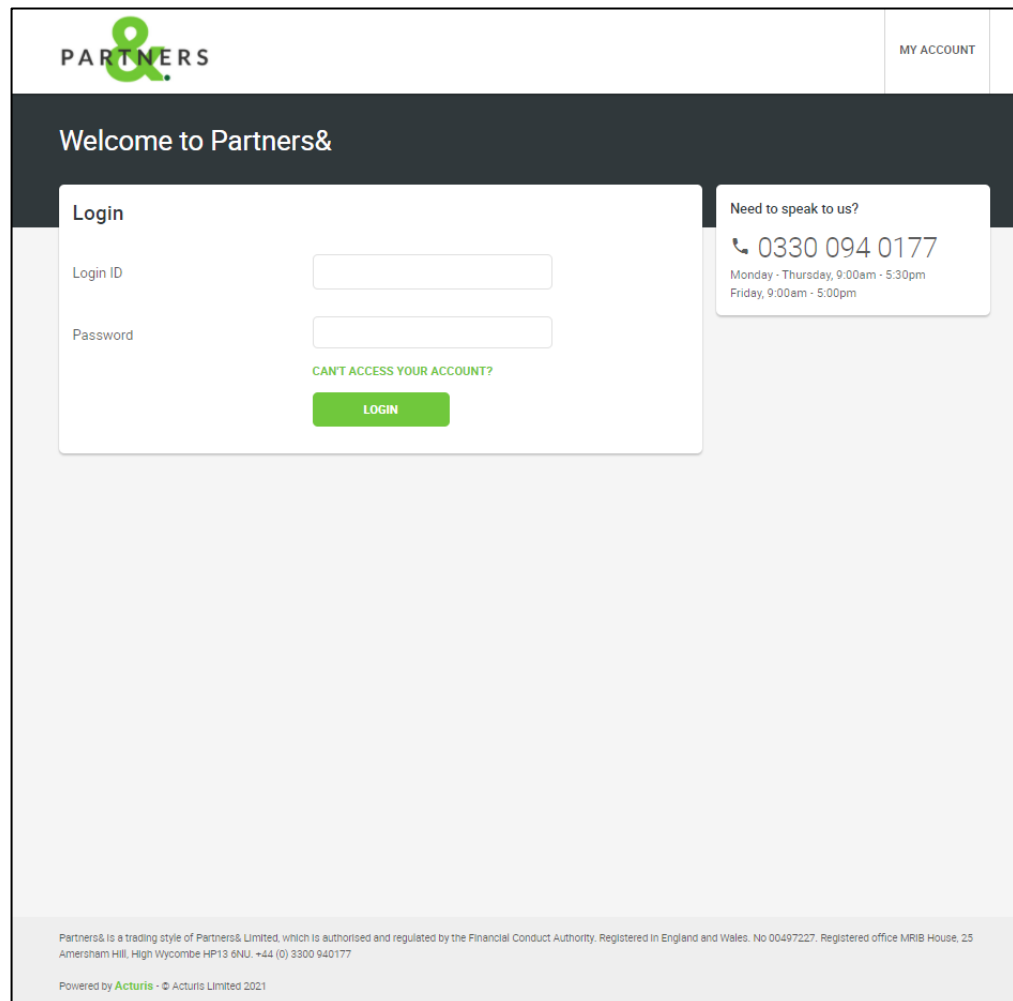
Kind regards,

This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.

## Step 2. Using your login details

Once your account has been verified, you'll be taken to our login screen.

Simply enter your password to continue or click '*Can't access your account?*' to be sent a password reset link.



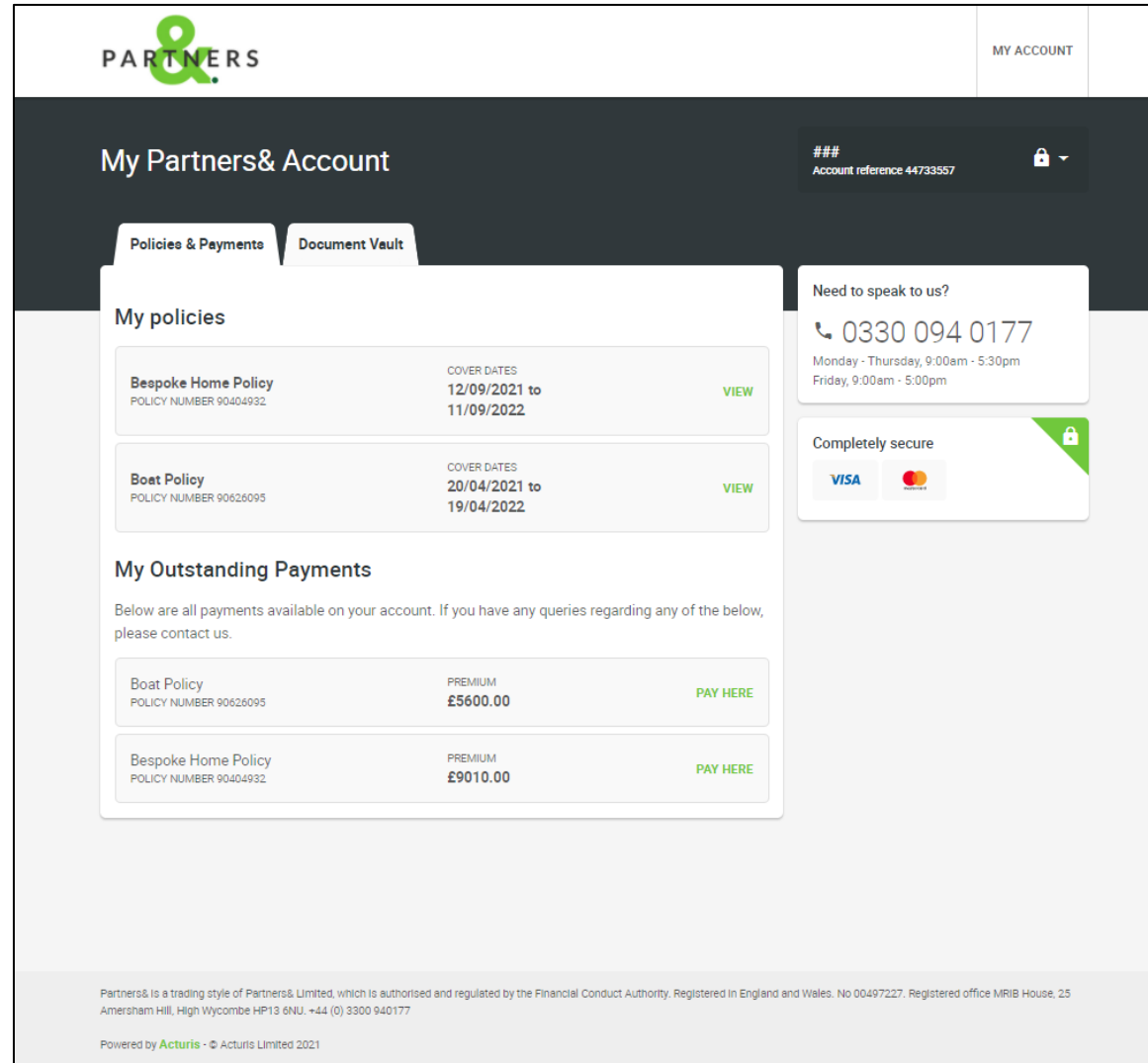
The screenshot shows the Partners& login interface. At the top left is the Partners& logo, and at the top right is a 'MY ACCOUNT' link. A dark banner below the logo says 'Welcome to Partners&'. The main content area features a 'Login' form with two input fields: 'Login ID' and 'Password'. Below the password field is a green link that says 'CAN'T ACCESS YOUR ACCOUNT?' and a green 'LOGIN' button. To the right of the login form is a box titled 'Need to speak to us?' containing a phone icon, the number '0330 094 0177', and the operating hours: 'Monday - Thursday, 9:00am - 5:30pm' and 'Friday, 9:00am - 5:00pm'. At the bottom of the page, there is a small footer with regulatory information and a note that the site is powered by Acturis.

### Step 3. Finding your way around

Congratulations! If you arrive at this page, you're logged in, you will now be able to:

- update your personal information
- view your live insurance policies
- view your Document Vault
- view / pay any outstanding invoices

The following pages provide specific details on how to use these areas.



The screenshot shows the 'My Partners& Account' dashboard. At the top, there is a navigation bar with the Partners& logo and a 'MY ACCOUNT' link. Below this, the main header area displays 'My Partners& Account' and an account reference number '### Account reference 44733557'. Two tabs are visible: 'Policies & Payments' (selected) and 'Document Vault'. The main content area is divided into several sections:

- My policies:** A list of two policies:
 

Policy Name	Policy Number	Cover Dates	Action
Bespoke Home Policy	90404932	12/09/2021 to 11/09/2022	VIEW
Boat Policy	90526095	20/04/2021 to 19/04/2022	VIEW
- My Outstanding Payments:** A list of two payments:
 

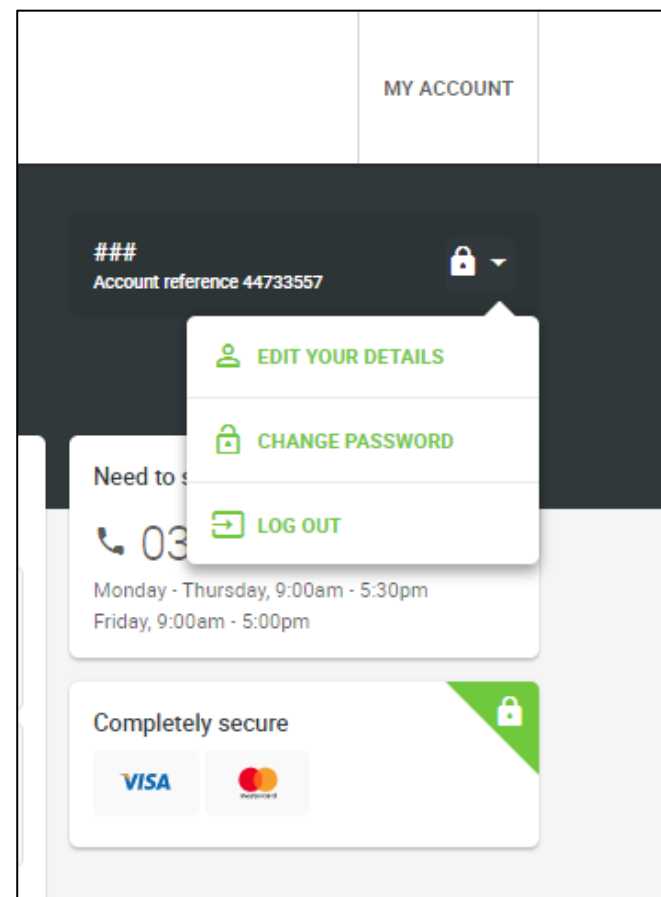
Policy Name	Policy Number	Premium	Action
Boat Policy	90526095	£5600.00	PAY HERE
Bespoke Home Policy	90404932	£9010.00	PAY HERE
- Need to speak to us?:** A contact box with the phone number 0330 094 0177 and operating hours: Monday - Thursday, 9:00am - 5:30pm; Friday, 9:00am - 5:00pm.
- Completely secure:** A security badge with a lock icon and logos for VISA and Mastercard.

At the bottom of the page, there is a footer with the following text: 'Partners& is a trading style of Partners& Limited, which is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales. No 00497227. Registered office MRIB House, 25 Amersham Hill, High Wycombe HP13 6NU. +44 (0) 3300 940177. Powered by Acturis - © Acturis Limited 2021'.

### Edit your details

This drop-down box allows you to edit your email address\* and contact telephone number, change your password or log out entirely.

\*If you change your email address, you will receive another verification email to complete this step





### Document Vault

This area allows you to view / download documents from **all your policies**.

Simply click on a document to download it.

The screenshot shows the PARTNERS user interface. At the top right, there is a 'MY ACCOUNT' link. The main heading is 'My Documents', with a sub-header '### Account reference 44733557' and a lock icon. Below this, there are two tabs: 'Policies & Payments' and 'Document Vault', with the latter being selected. Under the 'Document Vault' tab, there is a 'Your Documents' folder icon and a search bar labeled 'Find your documents'. Below the search bar, it says 'Below is a list of all documents stored on your account.' There is a search filter for 'All Documents' and a date range '17/07/2020 - 17/08/2021'. The document list contains two entries:

Document Name	Category	Date Created
Private Client Marine - D&N Questionnaire V3 Private Client Marine - D&N Questionnaire v3.docx	Policy 90626095 Boat	16/08/2021
Invoice Ref: 508853668; Invoice Method: On Account; Total Invoice Amount: 9010.00. Invoice.docx	General	13/08/2021

On the right side of the interface, there is a contact box 'Need to speak to us?' with the phone number '0330 094 0177' and operating hours: 'Monday - Thursday, 9:00am - 5:30pm' and 'Friday, 9:00am - 5:00pm'. Below that is a 'Completely secure' badge with VISA and Mastercard logos.

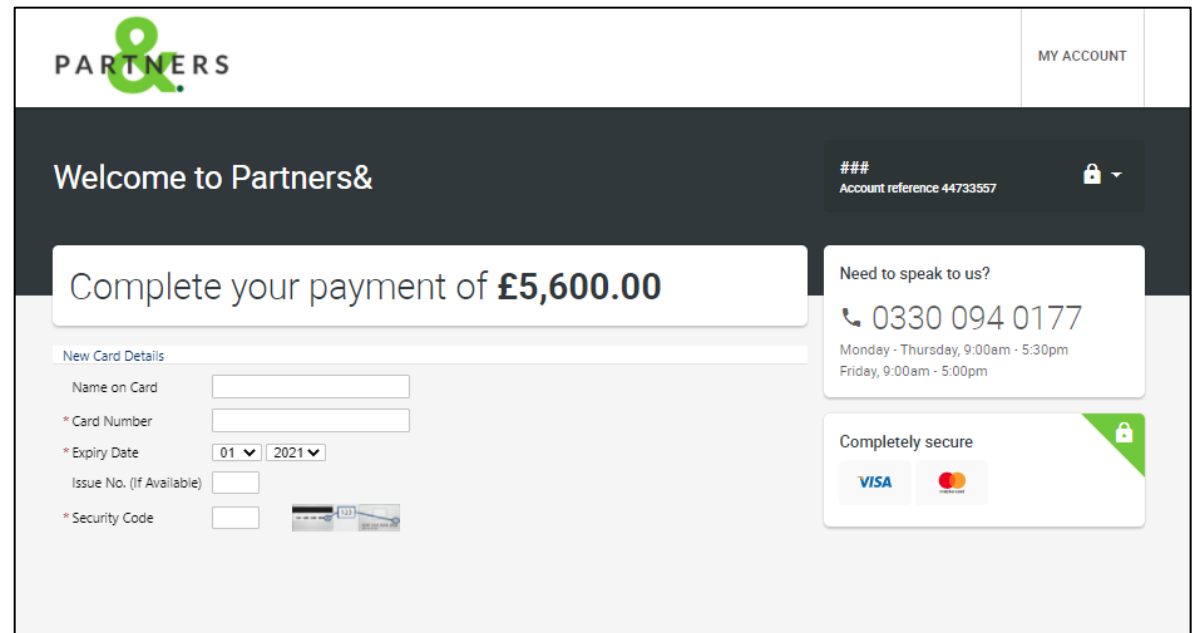
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### Payment screen (cards only)

Once you've selected an invoice to pay, simply enter your Credit/Debit card details into our secure payment portal to proceed.

Once payment is completed, you'll see a confirmation message pop-up on screen. We'll then upload any receipt/documents associated with this payment so you can view them online.



The screenshot shows the Partners payment interface. At the top left is the Partners logo, and at the top right is a 'MY ACCOUNT' link. Below the logo, the text 'Welcome to Partners&' is displayed. To the right of this, there is a user identifier '###' and an account reference 'Account reference 44733557' with a lock icon. A large white box in the center contains the text 'Complete your payment of £5,600.00'. Below this, the 'New Card Details' section includes input fields for 'Name on Card', '\* Card Number', '\* Expiry Date' (with dropdowns for '01' and '2021'), 'Issue No. (If Available)', and '\* Security Code'. To the right of the form, there is a contact information box with the phone number '0330 094 0177' and operating hours: 'Monday - Thursday, 9:00am - 5:30pm' and 'Friday, 9:00am - 5:00pm'. Below the contact box is a 'Completely secure' badge with a lock icon and logos for VISA and Mastercard.

**We hope you value this service and that you find it user-friendly.**

**In the event you have any difficulties, or have any suggestions for improvement, please let us know as we really value your feedback!**

**Thank you again for placing your business with Partners&.**

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