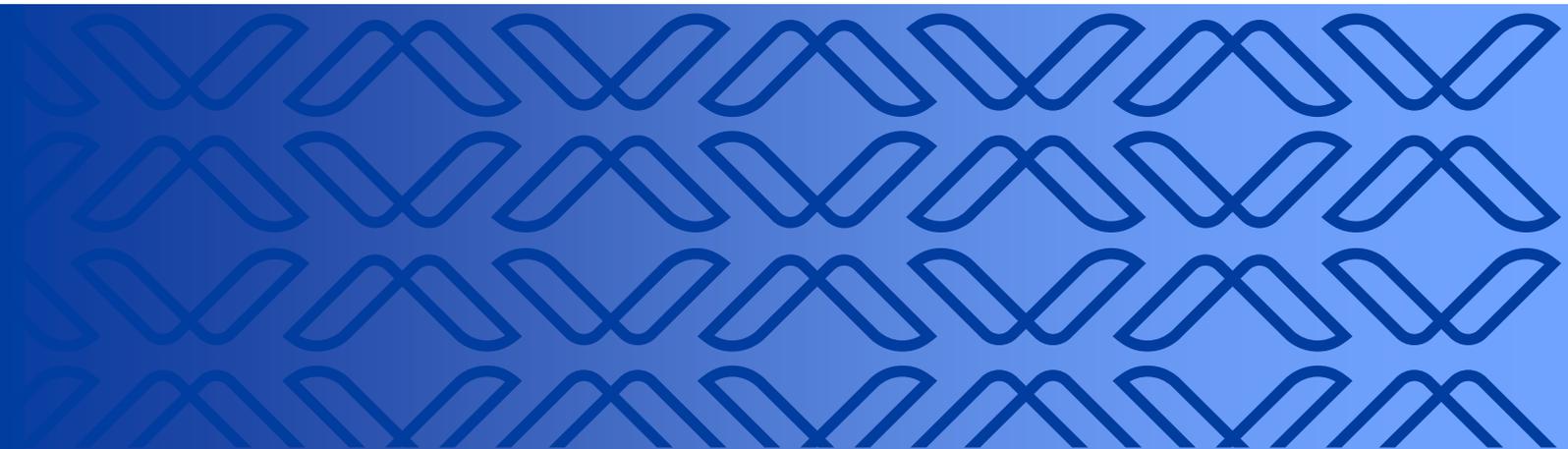




Client Portal User Manual

For Employees

20. Januar 2023



Contents

	Seite
1 Activating your portal account	3
2 Client portal	5
2.1 Insurance contract overview	6
2.2 Damage Cases	10
2.3 Premium Invoices	10
2.4 Tenders	10
2.5 Documents	10
3 Notification settings	11
4 Symbols	12

1 Activating your portal account

You will be registered by your company's user manager and will receive an email with a link and a temporary password to activate your portal account.

Once you open the link you will be redirected to the page where you can activate your account.

ACCOUNT ACTIVATION

Thank you for verifying your Account. You have to change your Password before you can login and access the Customer Portal.

Please enter Current Password

Enter New Password
✔ Password policy fulfilled

Confirm Password

Activation completed

- Enter the temporary password that you received by email.
- Enter a new and secure password that you would like to use to log in.
- The password must contain at least eight characters,
- must contain at least one uppercase letter,
- as well as at least one digit and
- at least one symbol or special character.
- The following symbols are accepted: !@#\\$\%*()_+^&}{;:?.
- Complete activation.

ACCOUNT ACTIVATION

Your password has been successfully saved and your account has been activated. You can now login on the next page with your new password.

Login

Click on "Login".

LOGIN

Please enter your Username and Password and click on Login

Username

Dani-Portalttestaccount

Password

.....

Remain logged in

Login

[Have you forgotten your Password?](#)

Log in with your username and password.

Username = registered email address.

2 Client portal

Direct link to portal: <https://portal.verlingue.ch/>

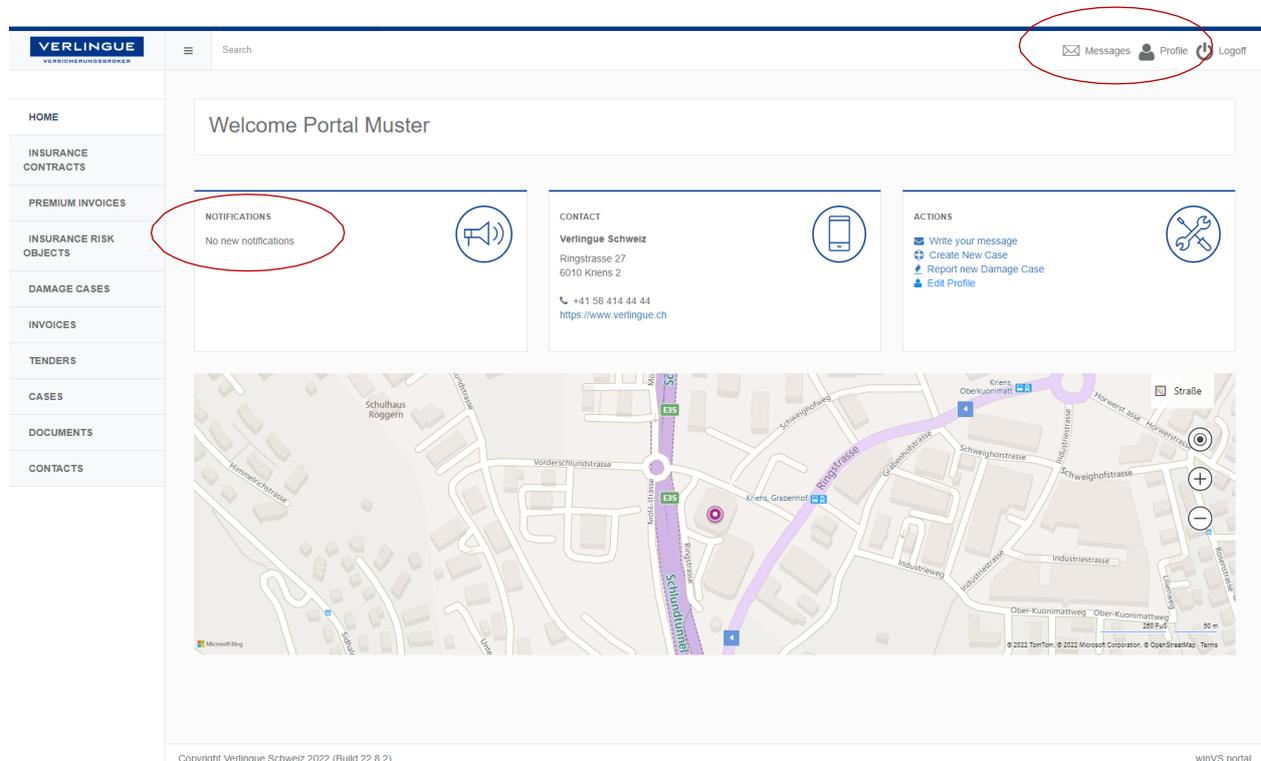
We recommend that you use the Microsoft Edge, Google Chrome or Mozilla Firefox browsers to ensure seamless access to our client portal.

Welcome to our client portal.

The "Home" page contains the three areas Benachrichtigungen, Kontakt und Aktionen (Notifications, Contact and Actions). In the Notifications area you can see your most recent unread messages and access them directly from here. In the Contact area in the middle you will find your broker's contact details. In the Aktionen (Actions) area you can enter a message for your advisor, submit a request or enter a claim directly from the home page.

On the left-hand side you have additional navigation with various selection options.

You can also access your portal messages (inbox for all messages) and your profile (notification settings, etc.) in the top right-hand corner.



The screenshot shows the Verlingue client portal interface. At the top, there is a navigation bar with the Verlingue logo, a search bar, and links for Messages, Profile, and Logoff. The main content area is titled "Welcome Portal Muster" and is divided into three sections: "NOTIFICATIONS" (showing "No new notifications"), "CONTACT" (for Verlingue Schweiz), and "ACTIONS" (with options like "Write your message", "Create New Case", "Report new Damage Case", and "Edit Profile"). Below these sections is a map showing the location of the office. The footer contains copyright information for Verlingue Schweiz 2022 and the text "winVS portal".

2.1 Insurance contract overview

In this area you can see all insurance contracts at a glance. The quick search function helps you quickly find the desired policy. You can quickly and easily filter the values by clicking on a column header. For more detailed information on a policy, click on the desired row.

Overview of Policy Contracts
Portal / Insurance Policy Contracts

CHOOSE VIEW **Active** ↻ ↗

10 ▾

Contract Number	Insurance Product	Insurance Company	Start Date	Expiration Date	End Date	Description
<i>Muster</i>						
1-834-343	Kollektiv-Krankentaggeldversicherung	Helsana	01.01.2022	31.12.2024		Ar
1-4351-22	Sach-Geschäftsversicherung	Mobiliar	01.01.2022	31.12.2024		Ar

1 to 2 from 2 Records 1

PREMIUM BY PRODUCT ↻ ↗



31.50 CHF 60.00 CHF

- Kollektiv-Krankentaggeldversicherung
- Sach-Geschäftsversicherung

As soon as you have clicked on a policy, the view shown below opens. In the overview you can see policy details and below that the corresponding areas for the opened policy.

Clicking on a title opens the detailed view.

OVERVIEW ↻

Insurance Contract: 1-834-343

Customer: Muster

Policy Contract Number: 1-834-343

Insurance Product: Kollektiv-Krankentaggeldversicherung

Insurance Company: Helsana

Start Date: 01.01.2022

Expiration Date: 31.12.2024

End Date:

Payment Type: Once per year

Gross Premium: CHF 60.00

Status: Active

Description:

DOCUMENTS ↻

HISTORY ↻

INSURANCE RISK OBJECTS ↻

DAMAGE CASES ↻

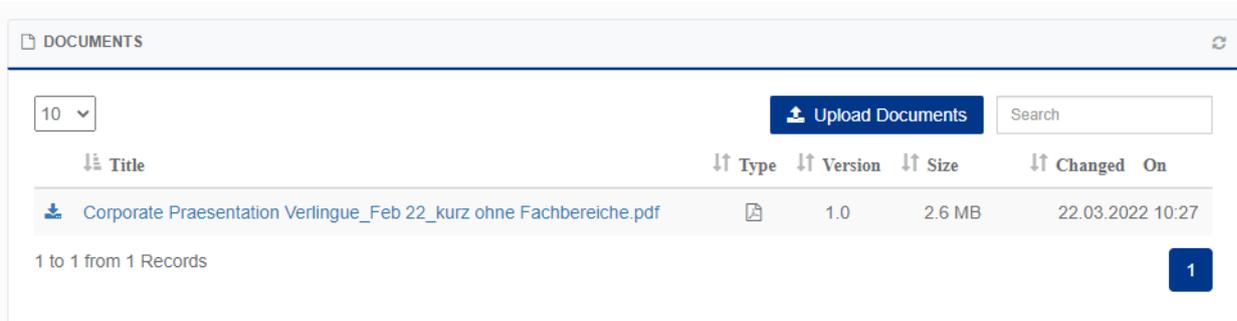
INVOICES ↻

CASES ↻

2.1.1 Documents

Here you will find all the documents that belong to the selected policy.

- Newly received documents are displayed with a number (according to the number of newly shared documents) next to the name of the area. This number disappears as soon as you have opened the document.
- A document can be opened by clicking on the link or on the  button.



The screenshot shows a web interface for document management. At the top, there is a header with a refresh icon and a search bar. Below the header, there is a dropdown menu showing '10' and a blue button labeled 'Upload Documents'. The main area contains a table with columns for 'Title', 'Type', 'Version', 'Size', and 'Changed On'. A single document is listed: 'Corporate Praesentation Verlingue_Feb 22_kurz ohne Fachbereiche.pdf' with a PDF icon, version 1.0, size 2.6 MB, and a timestamp of 22.03.2022 10:27. Below the table, it says '1 to 1 from 1 Records' and a blue button with the number '1' is visible in the bottom right corner.

With “Upload documents” new documents can be uploaded, which are then available to the advisor.

2.1.2 Messages

On the right-hand side of each entity you will find the "Nachrichten" (Messages) area. Here you can send a message to your advisor at any time. Below you will find the corresponding history, including the advisor's responses.

 POLICY CONTRACT MANAGER

Fuchs Linus

Verlingue Zürich

Write your message

Subject

Message

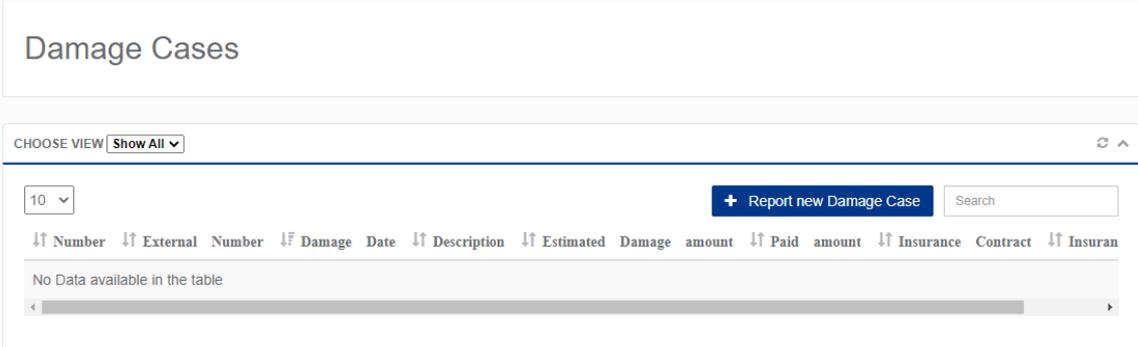
 Send

 MESSAGES 

No Data available in the table

2.2 Damage Cases

In this area you can see all claims entered via the portal and you can enter new claims.



2.3 Premium Invoices

In this area you will find all activated premium invoices (renewal notices, final invoices, etc.) at a glance.

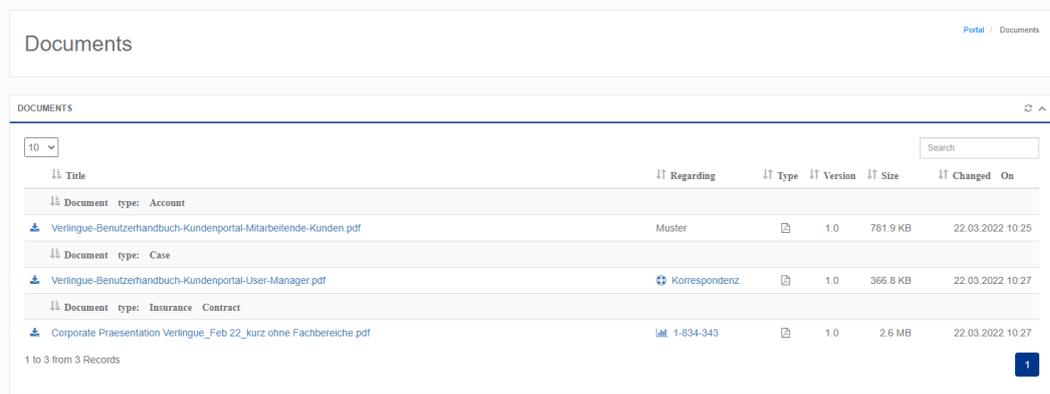
2.4 Tenders

In this area you can find all activated tenders at a glance.

2.5 Documents

In this area you can see all documents at a glance. With the help of the quick search you can quickly find the desired document. You can quickly and easily filter the values by clicking on a column header. For more detailed information on a document, click on the desired row.

- You can open or download the document by clicking on the icon.
- The “Regarding column indicates what the document refers to. The icons provide information about the area involved.



3 Notification settings

You can enter your notification settings under your profile. The following settings are made by default:

NOTIFICATIONS

Tenders:	Portal Notification	▼
Cases:	Portal & Email Notification	▼
Manner of Delivery:	Daily Summary	▼
Insurance Contracts:	Portal & Email Notification	▼
Manner of Delivery:	Daily Summary	▼
Portal Documents:	Portal & Email Notification	▼
Manner of Delivery:	Daily Summary	▼
Cases of Damage:	Portal & Email Notification	▼
Manner of Delivery:	Daily Summary	▼
Messages:	Portal & Email Notification	▼
Manner of Delivery:	Immediately	▼
Invoices:	Portal Notification	▼
Premium Invoices:	Portal & Email Notification	▼
Manner of Delivery:	Daily Summary	▼

[Save](#)

Email notification = push notification to personal email address
 Portal = information is marked with "New" on the home page under "Notifications".
 Daily summary = you receive an email per day when new documents are available

4 Symbols

Overview of key symbols:



Messages



Policies



Claims



Requests



Opens and closes the navigation



New notifications will appear here



Profile settings/logout



Link to a new view



Detailed view is open



Detailed view is closed Refresh page.



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