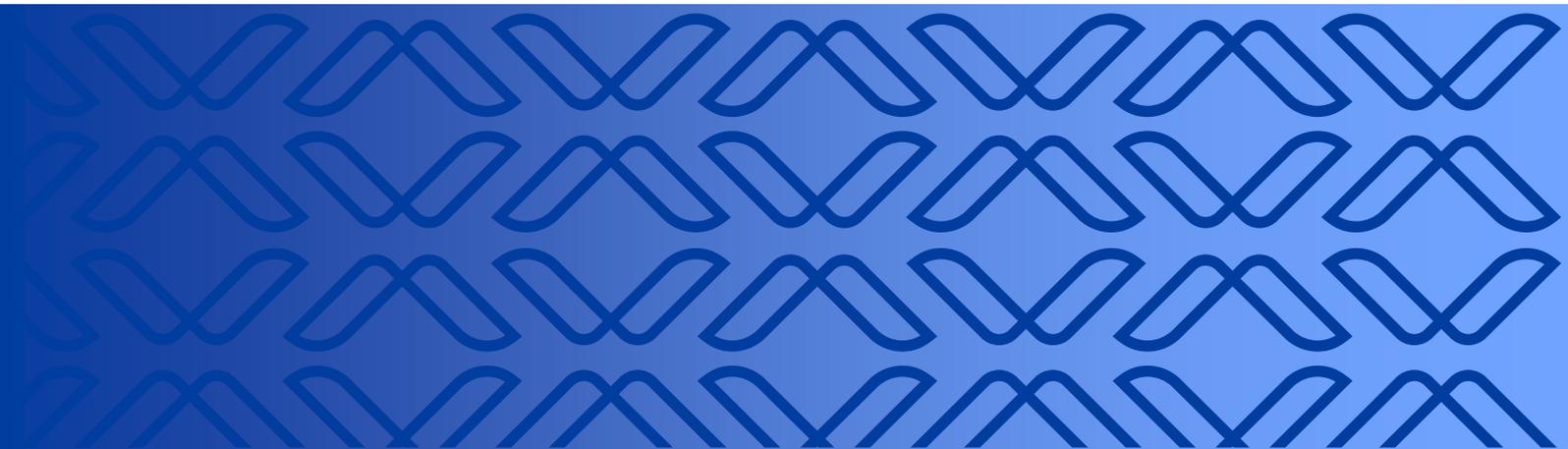




Client Portal User Manual

For User Managers

20. Juni 2023



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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-Portaltestaccount

Password

.....

Remain logged in

Login

Have you forgotten your Password?

Log in with your username and password.

Username = registered email address.

Client portal

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

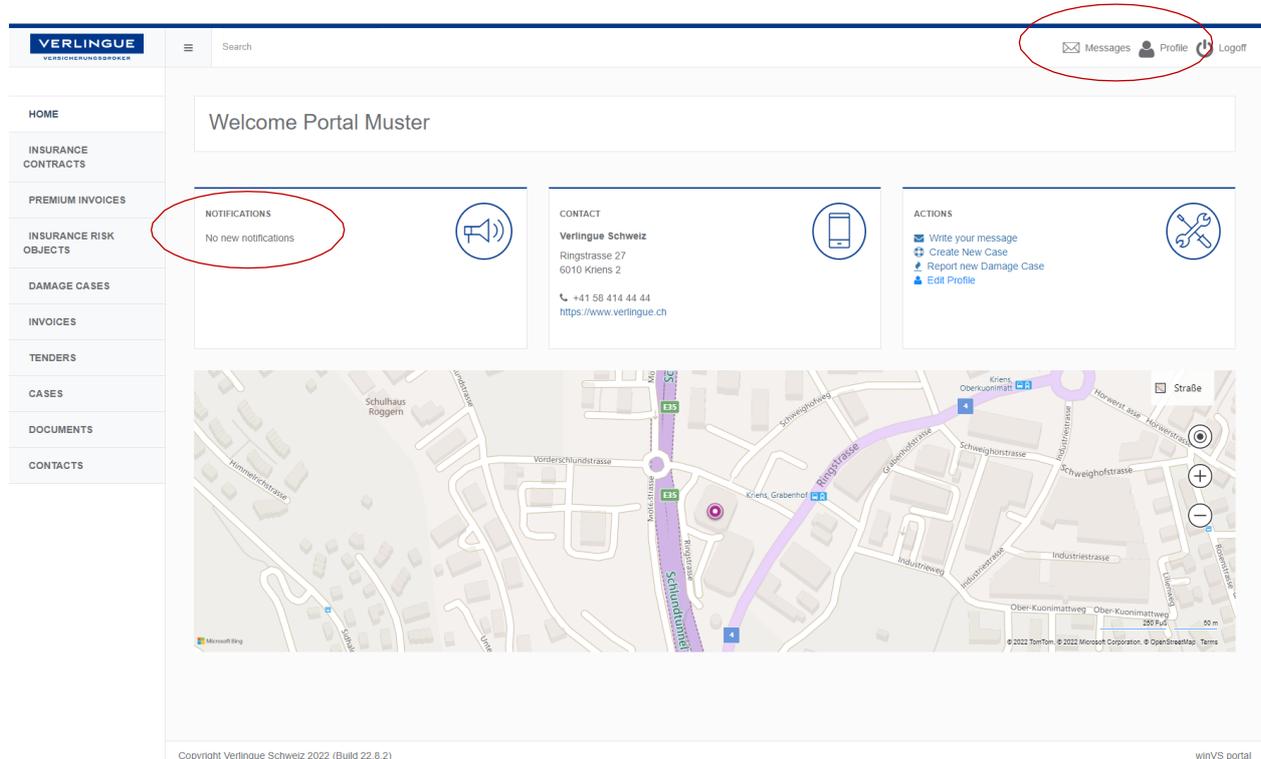
We recommend that you use the Microsoft Edge, Google Chrome or Mozilla Firefox browsers to ensure seamless access to our client portal.

Welcome to our client portal.

The "Home" page contains the three areas 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 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.



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Contacts

Under "Contacts" you can see the contacts that have already been saved for your company. If the desired contact has not yet been entered, you can enter it on the left-hand side.

HOME
INSURANCE CONTRACTS
PREMIUM INVOICES
INSURANCE RISK OBJECTS
DAMAGE CASES
INVOICES
TENDERS
CASES
DOCUMENTS
CONTACTS

Contacts Portal / Contacts

CHOOSE VIEW Show All

10

Full Name	E-mail	Job Title	Business Phone	Mobile Phone
Fuchs Linus	linus.fuchs@verlingue.ch		+41792402409	+41
Muster Portal	daniel.krieger@verlingue.ch		+41	+41

1 to 2 from 2 Records

+ Create New

1

After entering the contact – or for existing contacts – you can then create and assign the appropriate permissions for the new portal account.

As soon as the portal account has been opened, the relevant contact will receive the welcome email with their personal login details.

PORTAL ACCOUNT
ACTIVE

Roles

- Konzern Berufliche Vorsorge
- Konzern Personenversicherung ohne BVG
- Konzern Uebrige Branche
- Konzern Flottenmanager
- Personenversicherungen ohne BVG
- Berufliche Vorsorge
- UebrigeBranchen
- UserManager
- Flottenmanager
- Exklusiver Zugriff

Set State

Explanation of the relevant portal roles:

- **Berufliche Vorsorge (Pension plans):** Users who are allowed to see records related to pension plans (possibly not all persons in HR).
- **Flottenmanager (Fleet manager):** Access to motor vehicle insurance policies (possibly also for machine insurance, depending on requirements).
- **Personenversicherungen ohne BVG (Personal insurance excluding pension plans):** Users who are allowed to see records related to personal insurance, but excluding pension plans, as there is a separate/additional role for this function.
- **Übrige Branchen (Other sectors):** Access to all policies excluding Personal insurance, Pension plans and Fleet manager
- **Konzern Berufliche Vorsorge (Group pension plans):** This role is only required for holding structures: When a specific person needs to view all lower-level company records from the holding address in the Pension plans category.
- **Konzern Flottenmanager (Group fleet manager):** Similar to the role of Group pension plans for the Motor vehicle insurance category.
- **Konzern Personenversicherung ohne BVG (Group personal insurance excluding pension plans):** Similar to the role of Group pension plans for the Personal insurance excluding pension plans category.
- **Konzern Übrige Branchen (Group other sectors):** Similar to the role of Group pension plans for the Other sectors category.
- **Usermanager (User manager):** This role is only assigned to the person responsible for the portal and permissions on the client side, so that the user has the necessary rights to create accounts and to assign permissions/portal roles to users according to their activity. *No records are shared with this role.*
- **Exklusiver Zugriff (Exclusive access):** Records that, due to their confidentiality, may only be made available to a limited group of people (e.g. D&O, key person policies, etc. or annual reporting on all sectors and sensitive information) are only shared with this role, i.e. a person who may have access to confidential data.

Tip: A user who is supposed to have access to exclusive data, pension plan documents and other sectors would therefore have to be assigned several roles.