Client Portal User Manuel

For our portal customers

18 May 2026

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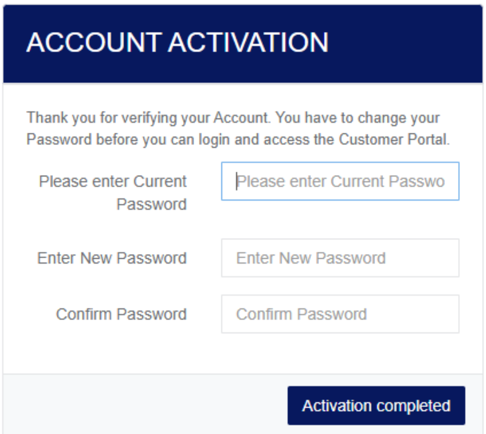
1 Access

1.1 Activation of your portal account

You will be registered by your company's user manager or by an employee of Verlingue and will receive an email containing a link and a temporary password to activate your portal account.
As soon as you open the link, you will be taken to the account activation page.



- Enter the temporary password you received by email.
- Enter a new and secure password that you would like to use for login.
- The password must be at least 8 characters long,
- must contain at least one uppercase letter,
- at least one number, and
-
- at least one symbol or special character.
- The following symbols are accepted: !@#\\$%*()_+^&}{:;?.
- Complete the activation process.

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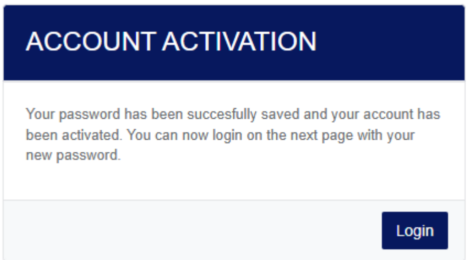
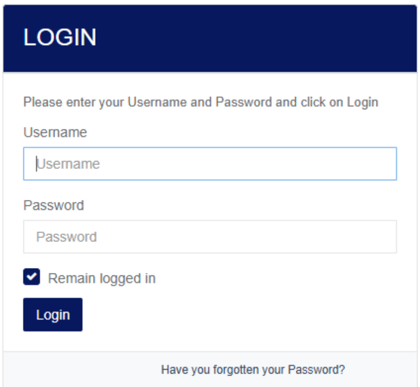


Click on «Log in».



Log in using your username and password.

Username = registered E-Mail adress.

2 Client Portal

Direct link to the portal: https://portal.verlingue.ch/

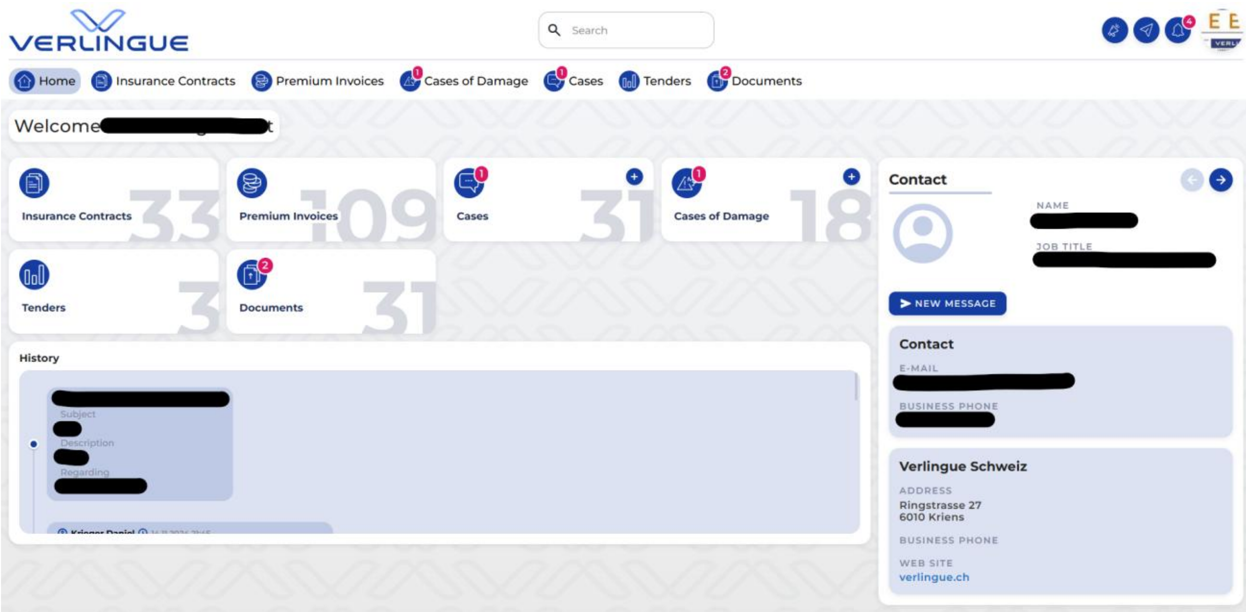
For access to our Client Portal, we recommend using the latest versions of the browsers Microsoft Edge, Google Chrome or Mozilla Firefox.

After logging in, you will be directed to the home page ("Home"). This page provides a central overview of your most important information and functions. Using the top navigation bar, you can switch directly between the different portal sections such as policies, premium invoices, inquiries, claims, tenders and documents.

In the central area of the home page, tiles are clearly displayed that summarize the current status of your data (e.g. number of policies, inquiries or claims). By clicking on a tile, you are taken directly to the corresponding section. Below this, the activity history shows recently processed or newly created activities.

On the right-hand side of the home page, you will find the contact section with details of your responsible broker as well as Verlingue Switzerland. Using the "New message" button, you can send an inquiry or message directly.

In addition, several buttons are available in the top right-hand corner. These allow you to access your portal messages, notifications, newsletters and your user profile. Personal settings can be managed via the user profile.



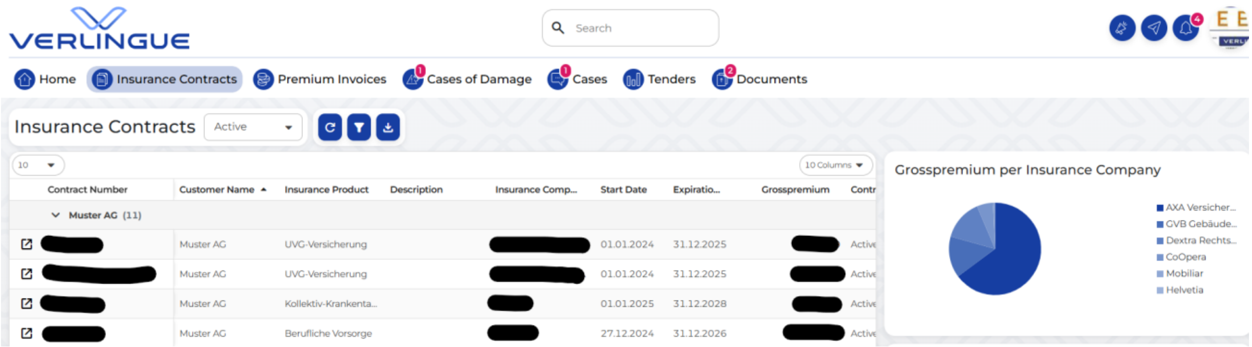
2.1 Policy overview

In the policy overview, you receive an overall view of all existing insurance contracts. The policies are displayed in a tabular view and include information such as policy number, policyholder, product, insurer, policy term and gross premium, among other details.

Using the search field above the table, policies can be found quickly. In addition, filter and sorting functions are available to specifically restrict the displayed values or sort them according to defined criteria.

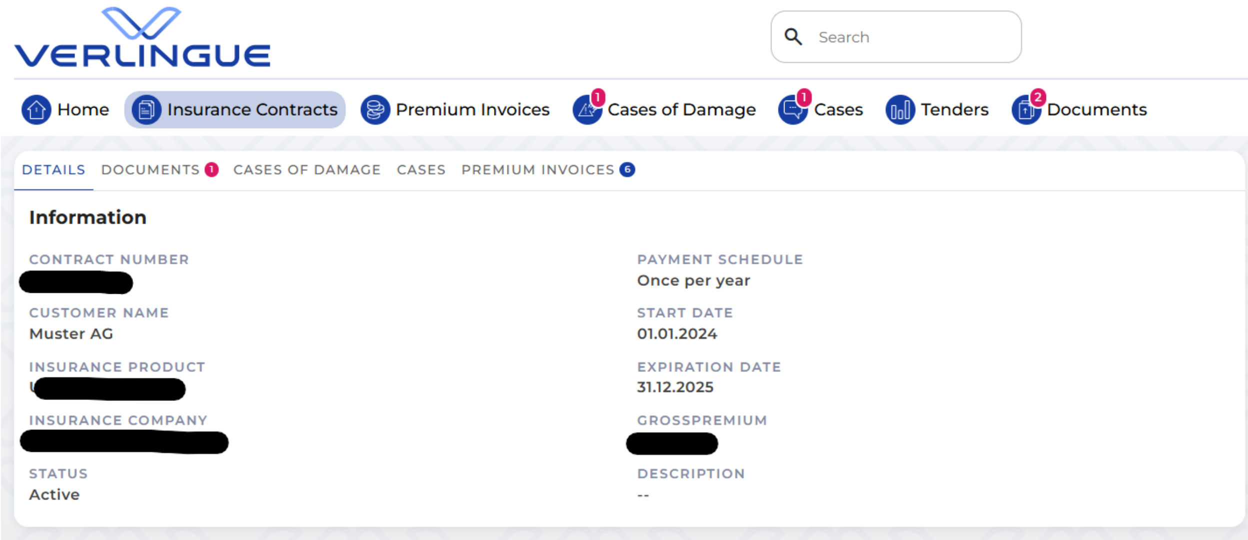
By clicking on a row, you open the detailed view of the selected policy with further information.

On the right-hand side, graphical evaluations are displayed that visualize gross premiums by insurer and by insurance product, providing a quick overview of the premium distribution.



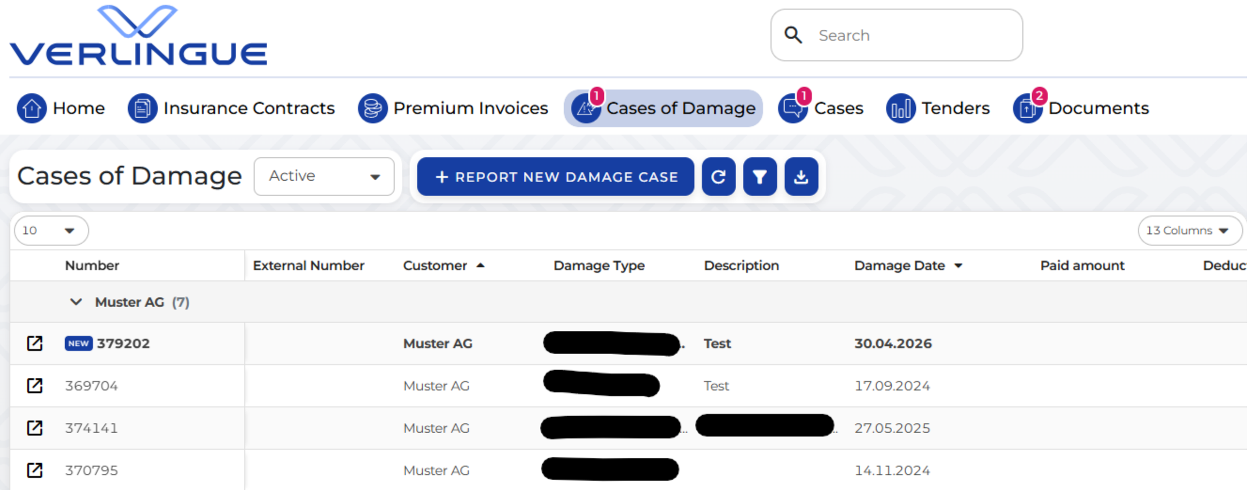
As soon as you select a policy in the overview, the detailed view of the selected policy opens. The most important information about the policy is displayed in the upper section, such as policy number, policyholder, insurance product, insurer, status, policy term, payment method and gross premium.

Below this overview, several tabs are available that allow access to the associated sections of the opened policy. These include, among others, details, documents, claims, inquiries and premium invoices. By switching between the tabs, you gain access to all relevant information and processes linked to the respective policy.



When you select a tab within a policy, the corresponding section of the opened policy is displayed. The content is clearly presented in a list or table view.

By clicking on an entry, the detailed view of the selected element opens, displaying additional information.



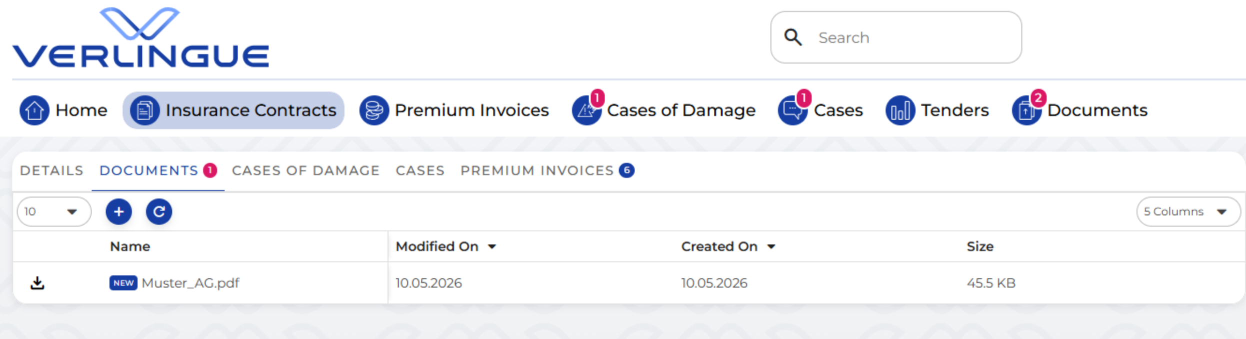
2.1.1 Documents

In this section, you will find all documents related to the selected policy.

New, unread documents are marked with a number indicating how many new documents have been added since the last access. Once a document has been opened, the corresponding indicator disappears.

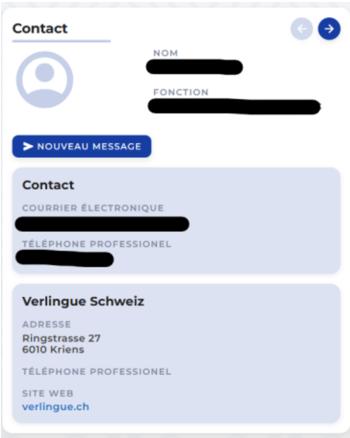
A document can be opened by clicking on the file name or via the download icon.

New documents can be added using the plus button. The uploaded documents are then also available to the responsible advisor.

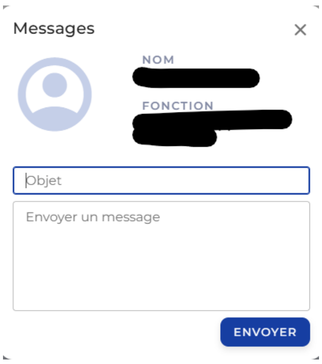


2.1.2 Messages

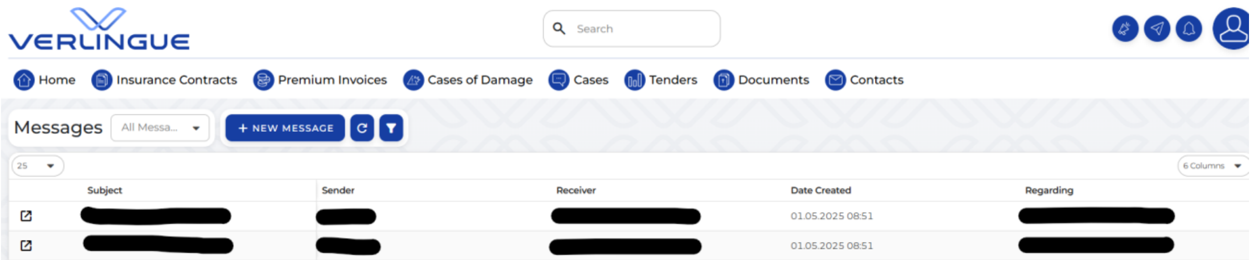
On the home page, the contact section is located on the right-hand side. In this section, you will find the contact details of your responsible advisor as well as the general contact details.



Using the "New message" button, you can compose a message directly to your advisor. A subject and the message text can be entered and then sent.

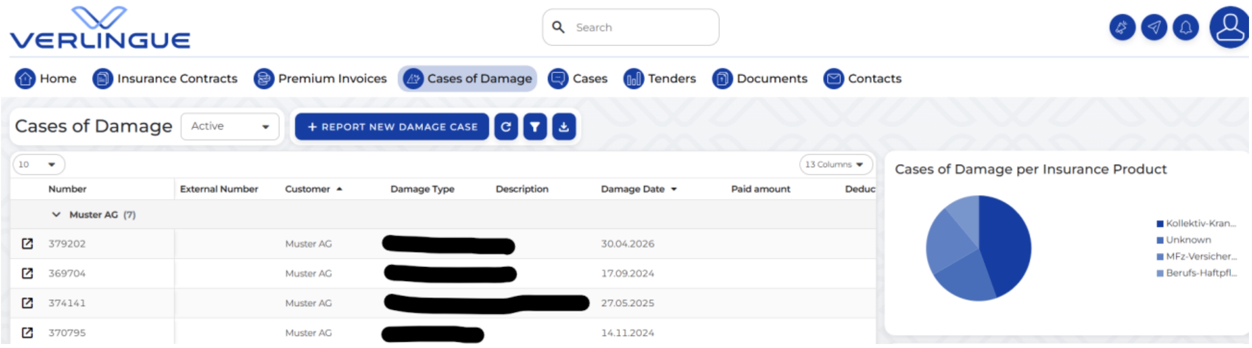


Using the paper plane button in the top right-hand corner, you can access the overview of all messages at any time. 



2.2 Claims

In this section, you can view all claims reported via the portal and submit new claims.



2.3 Premium invoices

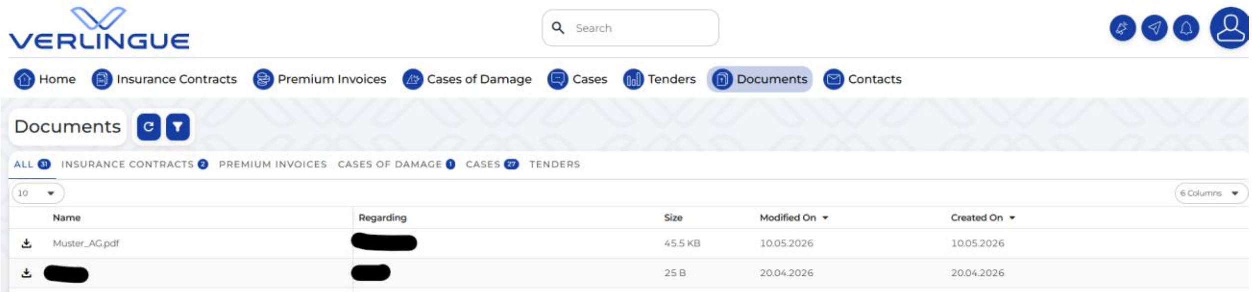
In this section, you will find an overview of all released premium invoices (subsequent premium invoices, final premium statements, etc.) at a glance.

2.4 Tenders

In this section, you will find an overview of all released tenders at a glance.

2.5 Documents

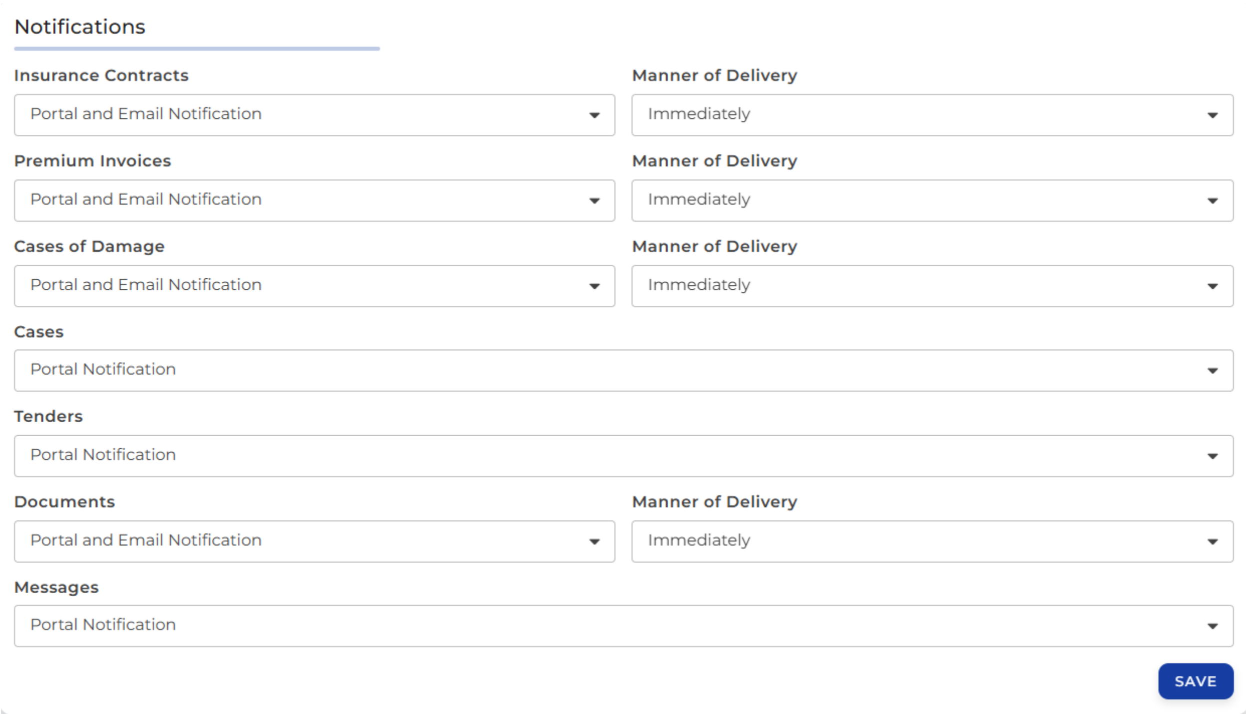
In this section, you can view all documents at a glance. Using the quick search, you can immediately find the document you are looking for. By clicking on a column header, you can easily and quickly filter the values. For more detailed information about a document, click on the desired row.



By clicking on the icon, you can download the document.

3 Notification settings

Notification settings can be configured under the user profile. The following settings are stored by default:



Email notification = Push notification to the personal email address
Portal = On the home page under “Notifications”, information is marked as “New”
Daily summary = You will receive one email per day as soon as new documents are available

4 Symbol descriptions

Overview of all important symbols:

 Notifications

 Profil settings

 Filter

 Refresh

 Newsletter

 Contacts

 Documents

 Policies

 Inquiries

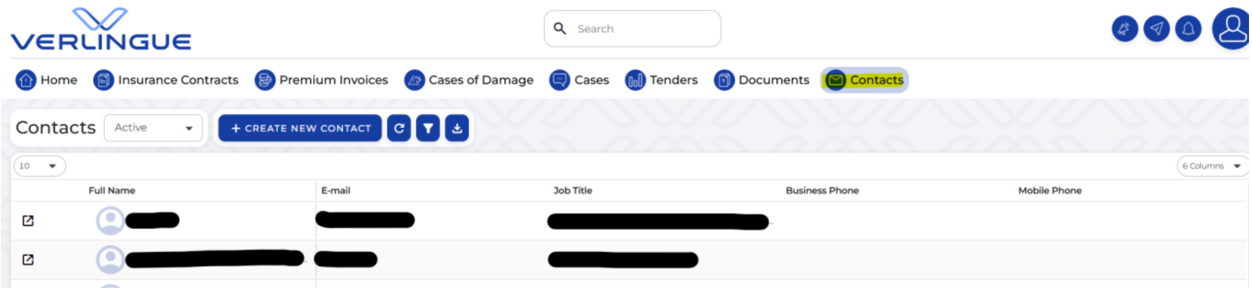
 Claims

 Tenders

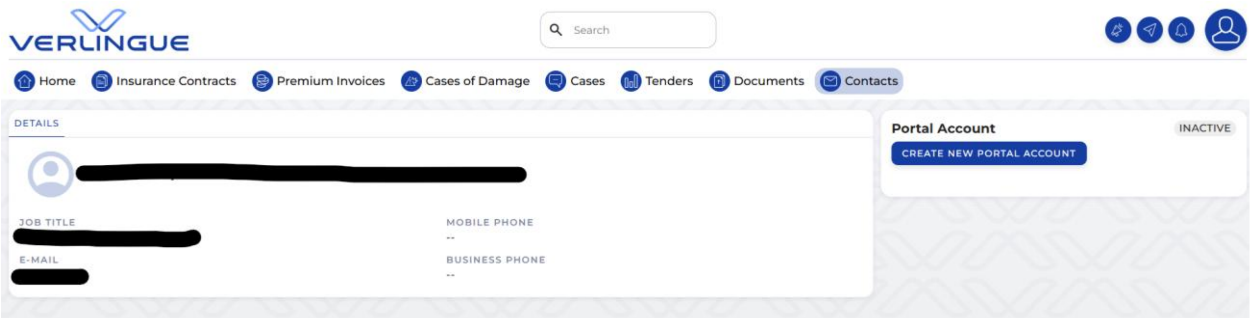
 Messages

5 User Management by the customer administrator

Under Contacts, you can see the contacts already stored for your company. If the desired contact has not yet been recorded, you can create it using the “Create new contact” button.

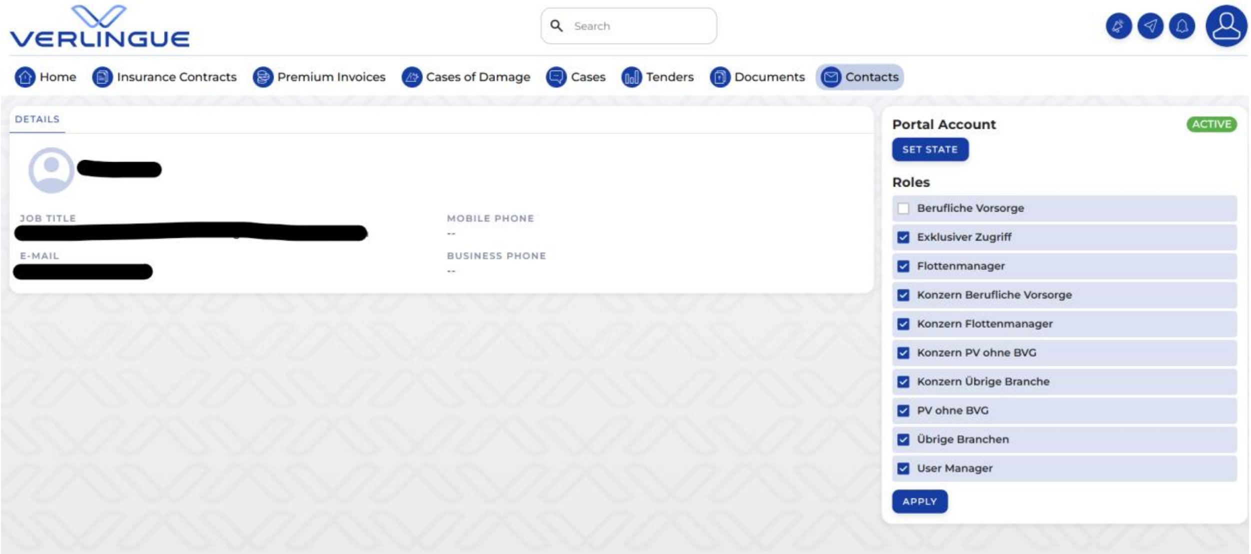


After creating a contact or for an existing contact, there is the option to create a portal account directly. To do this, open the corresponding contact and click on “Create new portal account”.
As soon as the portal account has been created, the contact automatically receives a welcome email with the personal access credentials.



Once the portal account has been created, the corresponding authorizations (roles) can be assigned to the account.
Using "Change status", the account status can be set to active or inactive.

To add or remove an authorization, the desired role must be selected (activate or deactivate the checkbox).
The changes must then be confirmed by clicking "Apply".



Explanation of the relevant portal roles:

- **Occupational benefits:** Users who are allowed to view records related to occupational pension schemes (BVG) (possibly not all HR employees).
- **Fleet manager:** Access to motor vehicle insurance policies (possibly also machinery insurance, depending on requirements).
- **Personal insurance without BVG:** Users who are allowed to view records related to personal insurance but without BVG, as a separate/additional role exists for this function.
- **Other business lines:** Access to all policies excluding personal insurance, BVG and fleet management.
- **Group occupational benefits**: This role is only required for holding structures. It is used when a specific person at holding level needs access to occupational benefits records of all subordinate companies.
- **Group fleet manager**: Equivalent to the Group Occupational Benefits role, but for the category of motor vehicle insurance.
- **Group personal insurance without BVG:** Equivalent to the Group Occupational Benefits role for the category of personal insurance without BVG.

- **Group other business lines:** Equivalent to the Group Occupational Benefits role for the category of other business lines.
- **User manager:** This role is assigned only to the customer's person responsible for the portal and authorizations, enabling them to create accounts and assign portal roles to users according to their activities.
  No records are shared with this role.
- **Exclusive access:** Records that, due to their confidentiality, may only be made available to a restricted group of people (e.g. D&O policy, key person insurance, or annual reporting across all business lines with sensitive information) are shared only with this role.

Tip: A user who requires access to exclusive data, BVG documents and other business lines must therefore be assigned multiple roles.