

ONLINE ACCESS THAT'S MADE TO MEASURE

Setting up a Master Account for larger firms with multiple departments



Enjoy all the current and future benefits of our innovative Online Service Centre by setting up a Master Account with us today. Setting up a Master Account gives you full and immediate access to a whole range of policy servicing functions, access to full details of all your RL360° policies and the option to apply for online switching.

And as a Master User, all new policies will automatically be assigned to your Account, you will see pipeline details and, as we introduce exciting new functions in the future, you will automatically have access to them.

Our flexible online access structure gives you the opportunity to create the perfect account structure for your firm. This means you can create Sub-Master Accounts for each of the different departments in your firm. You can then sub-divide your policies to allow each department to view only those policies they are responsible for.

Follow the steps (right) to create a Master Account and Sub-Master Account structure today.

Follow our simple 4 step plan to create the ideal structure for you...

1. Complete the *Master Account Agreement Form* (ref RL170)
2. Apply to be a Master User by completing page 2 of the *Account Creation and User Registration Form* (ref RL171). **Fill out the same form again for each person you wish to create as a Master User**
3. Complete page 3 of the *Account Creation and User Registration Form* (ref RL171) for each department you wish to set up as a Sub-Master. **Fill out the same form again for each person you wish to create as a Sub-Master User**
4. Send both original, signed forms to us at Web Support, RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles

If you have an Administrator you'd like to have access to some (or all) of your RL360° policies, you can do that by creating a sub-user online on our website once your Master Account is set up.

Sub-Master Users can also set up sub-users in the same way, giving them access to some (or all) of their policies.

Example

XYZ Advisers is a large intermediary firm operating from one central office in Thailand. There are 2 partners (Yasmin and Billy). Yasmin and Billy require access to all of XYZ Advisers policies, so will both be set up as a Master User.

XYZ have an Admin Manager called Winnie and a Sales Manager called Richard. Winnie has 2 administrators working in her team, each of whom is responsible for half of the policies. Richard has 1 sales consultant in his team, who needs to have access only to the policies he sold. The solution is to set up Winnie and Richard as Sub-Master Users. They can then sub-divide their policies between the administrators and sales consultants respectively, ensuring each person only sees policies they are allowed to view.

