

ONLINE ACCESS THAT'S MADE TO MEASURE



Setting up a Master Account for larger firms with multiple office locations

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. So if you have more than one office that is each responsible for some but not all of your policies, you can create Sub-Master Accounts for each different office. You can then sub-divide your policies to allow each office 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 office 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

ABC Advisers is a large intermediary firm operating in the Middle and Far East. There are 3 partners (David, Sarah and Hasan), and they have offices in Dubai, Bahrain and Thailand. Each of the 3 partners require access to all of ABC Advisers policies. So each of the 3 will be set up as a Master User.

However, they want the office manager in each of their offices to have access to the policies in their region. This means sub-dividing their policies so that each office manager sees just those policies they are responsible for. The solution is to create a Sub-Master Account for each office manager.

