Lockton's Client Portal & Online Proposal Form

A user guide

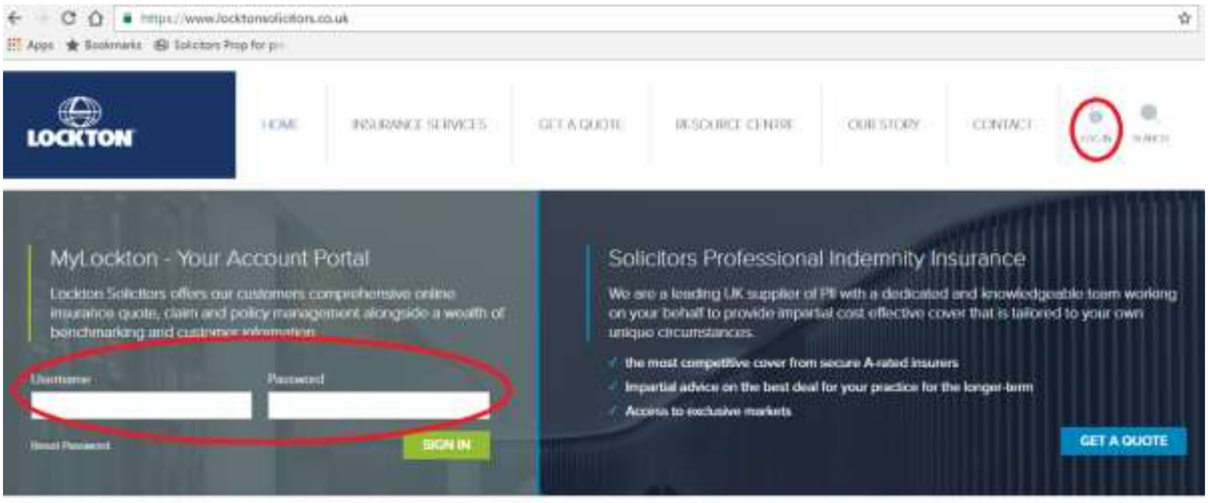
October 2016

Using Lockton's Client Portal

This guidance provides a step-by-step guide to help familiarise you with our portal and our online form.

1. Logging In

Log in to your portal at www.locktonsolicitors.co.uk



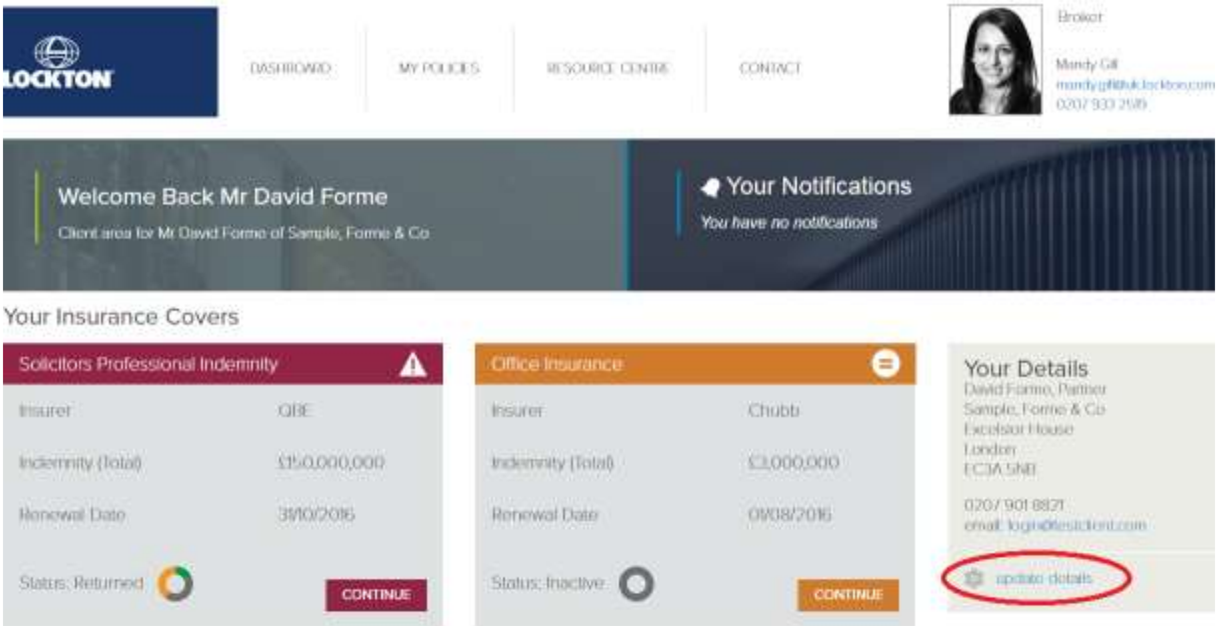
Your username is the email address we have on record for you.

Your Account Executive will probably have sent you log in details by email already. If not, contact them to get set up on the portal.

You should have changed your password on first log-in.
If you can't remember your password, there is a Reset my password button on the log in screen.

2. Your Client Dashboard

Having logged in, you will see a dashboard screen, summarising the insurances you hold with us, and the status of any renewal application process.



From here you can:

- **Update your contact details**
- **Change your password**
- **View your Insurance Policy documents**
- **Complete your online proposal form**

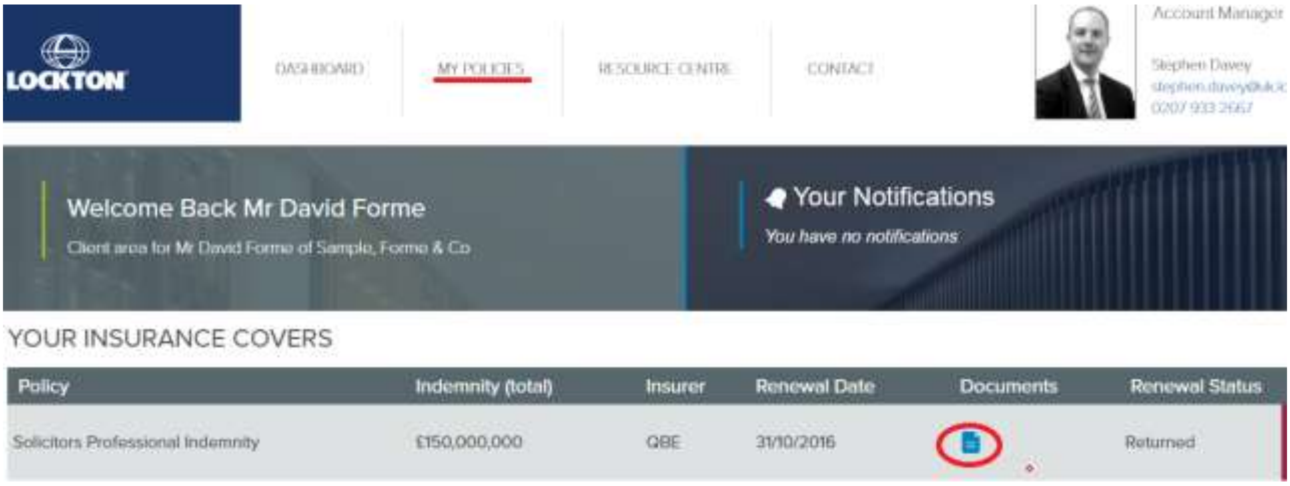
3. Updating your Contact Details & Changing your password

From the logged-in dashboard, simply click 'Update details' (on the RHS of the screen). You can update your details at any time, or change your password. Ensure you save the changes before exiting this screen.

4. Viewing/Downloading your Policy documents

Select 'My Policies' from the menu (you need to be logged in to see this) and click on the blue 'documents' icon. If the icon is greyed out, there are no documents currently stored for this insurance policy.

You should be able to view policy documents, invoices, and other key documents associated with this policy. To save them on your computer simply right click on your mouse and choose the 'save as' option.



5. Viewing/Starting your Proposal form

You may have been offered the option of completing your Professional Indemnity proposal form online. This function is currently restricted to your professional indemnity proposal form, but will be extended to other insurances in due course.

If you have a live proposal form, it will show on your dashboard, with either a 'Start' button or a 'Continue' button (if the form has already been started) clearly highlighted. If your proposal form is not currently live, this button will be greyed out

6. Navigating the Proposal form

Navigating the form is simple. Just scroll through the form, or jump to a section using the section numbers at the top of the screen.

You can contact your Account Executive for assistance with any aspect of completing the form at any time – their contact details are at the top right hand side of the screen.

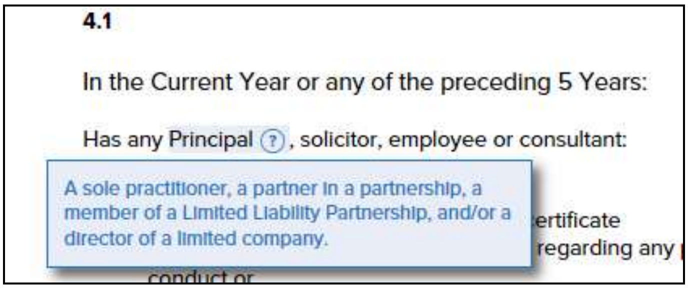
The summary screen (accessed by clicking on the green Summary button on the far left, gives you an overview of your progress on the form, and highlights any sections that may contain errors.

You can also scroll directly to the relevant error sections by clicking the red Warning symbol next to the Save Progress button (top right of the navigation pane).

The colour coding in the navigation bar is simply a visual cue indicating whether a question is complete (green), in progress (amber), contains errors (red), or is not applicable (grey).

7. Completing the form

Your form is substantially pre-populated. We nonetheless recommend reading through the proposal form quickly before you start, to identify which bits of information may take longer to collate than others. Delays can be caused when colleagues who are required to provide key data are busy or away from the office for a period.



The form is responsive, and only displays questions relevant to you. We recommend starting by completing the Financial Information (Q5.1) and Work-splits (Q6.1), as these largely determine which other questions apply.

Help-text throughout the proposal form can be Accessed simply by hovering your mouse over the blue ? symbol.

For more guidance on presenting the best submission for insurers, see our detailed guidance note on completing your proposal form. Or speak to your Lockton Account Executive.

8. Saving the form

The proposal form auto-saves every two minutes, but it is always a good idea to press the save button from time to time, to ensure your work has been saved.

You do not have to complete the form in one sitting: you can log in and out as many times as you like. If you plan to work on the form for a sustained period, tick the 'keep me logged in' option at the log-in screen, though you will get an alert if you are logged out after a period of inactivity.

9. Submitting the form

Once you have completed the form, and there are no material errors preventing submission, you will be given the opportunity to 'Submit and proceed to declaration'.

You will be required to confirm the accuracy of the data included.

You will receive an acknowledgement immediately the form has been received by us.

OUR MISSION

To be the worldwide value and service leader in insurance brokerage and risk management

OUR GOAL

To be the best place to do business and to work

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