

# Endsleigh User Guide

Tenant Verifier

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## Logging in to Tenant Verifier

To access Tenant Verifier, please use the following link:

### Letting Agents:

<https://endsleighlettingagent.backgroundchecking.com/>

### Direct Landlords:

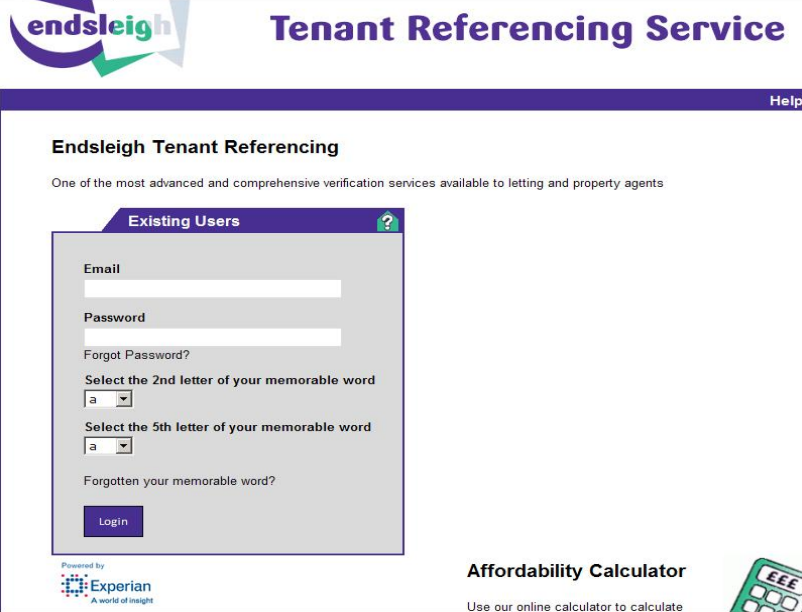
<https://endsleighdirectlandlord.backgroundchecking.com/>

***For improved usability please save this to your internet browser favourites.***

## Logging In:

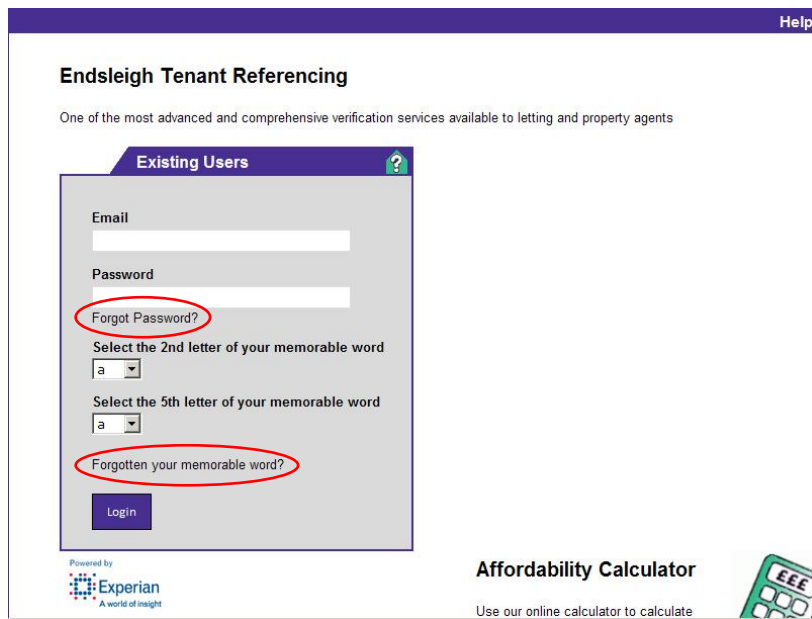
Enter your email address followed by your password

For additional security you will be asked to enter letters from your chosen memorable word.



The screenshot shows the 'Endsleigh Tenant Referencing Service' login interface. At the top, the 'endsleigh' logo is on the left and 'Tenant Referencing Service' is in the center. A 'Help' link is in the top right corner. Below the header, the text 'Endsleigh Tenant Referencing' is followed by a description: 'One of the most advanced and comprehensive verification services available to letting and property agents'. The main login area is titled 'Existing Users' and contains a form with the following fields: 'Email' (text input), 'Password' (password input), 'Forgot Password?' (link), 'Select the 2nd letter of your memorable word' (dropdown menu showing 'a'), 'Select the 5th letter of your memorable word' (dropdown menu showing 'a'), and 'Forgotten your memorable word?' (link). A 'Login' button is at the bottom of the form. At the bottom of the page, there is a 'Powered by Experian' logo on the left, an 'Affordability Calculator' link in the center, and a calculator icon on the right with the text 'Use our online calculator to calculate'.

## Forgotten Passwords

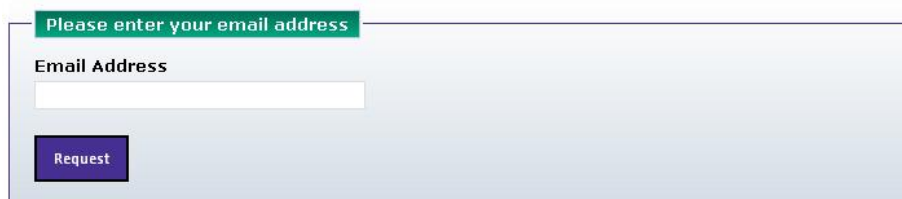


The screenshot shows a web interface for 'Endsleigh Tenant Referencing'. At the top right is a 'Help' link. Below the title is a descriptive sentence. The main section is titled 'Existing Users' and contains a login form with fields for 'Email' and 'Password'. Below these fields are two links: 'Forgot Password?' and 'Forgotten your memorable word?'. Both links are circled in red. Below the links are two dropdown menus for selecting letters from a memorable word, both showing 'a'. At the bottom of the form is a 'Login' button. To the right of the form is an 'Affordability Calculator' link and a small calculator icon. The footer includes the Experian logo and the text 'Use our online calculator to calculate'.

If you have forgotten any of your details, click on either of the respective links to reset your password or memorable word.

The links will direct you to the following page where you will be required to enter your email address followed by clicking '**request**'. This will send a link to your email address which will allow you to reset your password or memorable word.

### Forgot Password



The screenshot shows a form titled 'Please enter your email address' in a green header bar. Below the header is a label 'Email Address' followed by a text input field. At the bottom of the form is a 'Request' button.

## Customer Home Page

From the customer Home Page a variety of functions can be accessed. Predominantly, you will be able to create new cases, manage cases in progress and use the Ask an Expert service.

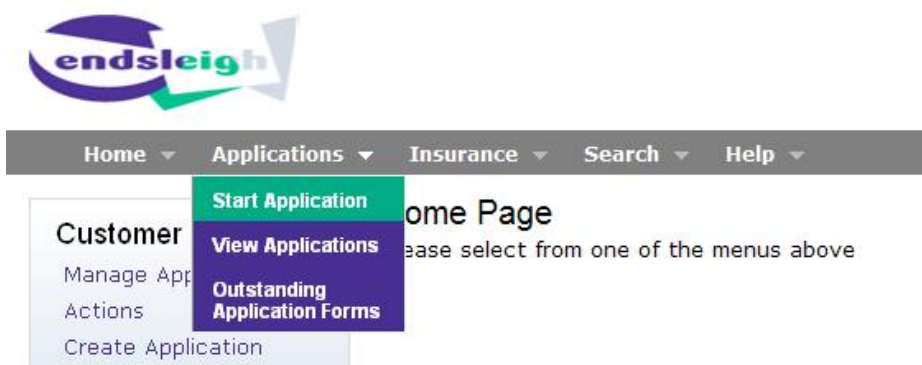


## Creating and Managing Applications

From the Home Page, by clicking on the **'cases'** tab you can either view applications or create a new application.

### Create Application

To begin a new application click **'Start Application'**, found under the **'Applications'** tab.



Enter the address of the property the tenant(s) will be renting.

To populate the full address enter the postcode first, followed by clicking **'lookup address'**

Click on the correct property followed by **'Confirm Address'**.

Applications

List All Applications

Create Application

See Also

Home

Rent Share Totals

Rent Covered: £0.00

Outstanding Rent: £0.00

Affordability Calculator

Create Tenancy Application

Customer Information

Customer Name Stepsh Ends

Branch Stepsh Ends

Property Details

Flat Number

House Name

House Number

Post/Zip Code

Street

District

Town/City

County

Address Lookup

Possible matching addresses are listed below. Choose one from the list or press 'Cancel'.

Riverleen House, Electric Avenue, NOTTINGHAM, NG80 1RH

Cancel

## Rental Details

It is possible to reference multiple tenants. The full rental figure must be covered by either sharing between the tenants, or one tenant covering the full rental amount.

Rent Share Totals

Rent Covered: £0.00

Outstanding Rent: £1000.00

Affordability Calculator

Rental Details

Monthly Rental £ 1000

Tenancy Term (Months) 12

Number of Tenants/Guarantors 1

Start Date Mon 3 Dec 2012

Entering the tenant's income into the **Affordability Calculator** will enable you to check that each tenant can afford their share of the rent before you begin the referencing process.

Please enter your Gross annual income and click Calculate.

Gross annual income =

£

789

456

123

0

Calculate

Reset | Close

Enter the tenant's annual salary and the calculator will display the tenant's maximum acceptable share of rent. The total rent can be distributed between the tenants before the application is submitted.

In order to proceed, the exact rental amount must be covered.

If a guarantor(s) is being referenced in addition to the tenant, please enter their details within the '**additional guarantors**' section.

Select the start date (for your own reference), changing the year and month if required, then click on *day of the month* to populate the field.

County Dec 2012

**Rental Details**

Monthly Rental £

Tenancy Term (Months)

Number of Tenants/Guarantors

Start Date The Start Date field is required.

Select whether the applicant is the **‘Tenant’** or **‘Guarantor’** by using the radio buttons. Then enter the details for the applicant(s).

**Tenant 1**

Tenant or Guarantor ☒ Tenant ☐ Guarantor

Title Mr

First Name Tommy

Middle Names

Last Name Test

Type of Report Comprehensive

Rent Guarantee 12 months rent guarantee Please [CLICK HERE](#) to download your Rent Guarantee policy document

Share Of Rent £ 500

Who Should Fill In The Application ☒ The Applicant ☐ Me

Applicant Email Address tommy@test.com

Can we contact the applicant for referencing purposes ☒

Rent Share Totals  
Rent Covered: £1000.00  
Outstanding Rent: £0.00  
[Affordability Calculator](#)

Use the dropdown menu to select the correct tile and type of report required.

If you have the application details and consent of the applicant, you can select to complete the online form yourself using the radio button **‘Me’**.

**Tenant 2**

Tenant or Guarantor ☒ Tenant ☐ Guarantor

Title Mrs

First Name Tina

Middle Names

Last Name Test

Type of Report Comprehensive

Rent Guarantee 12 months rent guarantee Please [CLICK HERE](#) to download your Rent Guarantee policy document

Share Of Rent £ 500

Who Should Fill In The Application ☐ The Applicant ☒ Me

Can we contact the applicant for referencing purposes ☒

Rent Share Totals  
Rent Covered: £1000.00  
Outstanding Rent: £0.00  
[Affordability Calculator](#)

Alternatively you can select that the applicant will fill in the online form. To do this select **‘The Applicant’** from the two radio buttons. The system will send an email to the applicant. The email will contain a link to a web form for the applicant to input their details and provide their consent for us to process the document.

## Do not contact the applicant?

Unless you have previously requested that Experian do not contact the applicant during the referencing process, the **'Can We Contact The Applicant'** tick box will be shown.

If for specific applications you do not want Experian to contact the applicant, please un-tick the box. If Experian cannot contact the applicant, any queries will be made via yourself.

## Referencing Guarantors

Guarantors can be referenced without referencing a tenant; however if you would like to reference a Guarantor in addition to the tenant(s) you are able to do so by clicking **'Add Guarantor'**.

Additional Guarantors

Add Guarantor

If the tenant's details are supplied above, you have the ability to select the tenant(s) the guarantor is accountable for from the dropdown menu. If the guarantor is accountable for more than one tenant press your **Ctrl** button on your keyboard and click those tenants.

Rent Share Totals  
Rent Covered:  
£1000.00  
Outstanding Rent: £0.00  

Affordability Calculator

Additional Guarantor 1

Remove Guarantor

Guarantor For  

Tommy Test  
Tina

Hold the CTRL on your keyboard and use your mouse to select multiple tenants

Title

First Name

Middle Names

Last Name

Type of Report

Rent Guarantee

Share Of Rent £ 1000

Who Should Fill In The Application ☐ The Applicant ☐ Me

Can we contact the applicant for referencing purposes ☒

Add Guarantor



## Who's The Landlord

This section is specifically for insurance purposes only. If you wish, Endsleigh will contact the Landlord regarding their insurance.

Rent Share Totals  
**Rent Covered:** £0.00  
**Outstanding Rent:** £0.00  
[Affordability Calculator](#)

### Who's The Landlord

If you would like us to contact the Landlord regarding their insurance please enter the Landlord's details here:

**Title**

**First Name**

**Surname**

**Renewal/contact date**

**Phone Number**

**Email**

Once you have entered the tenant and guarantor information (if required) proceed by clicking **'Submit'** to start the application detail capture stage.

### Summary

Please ensure that the information you have entered above is correct as this will be used for the basis of our referencing. If details are incorrectly entered then this could delay the referencing process.

[Submit](#)

## Completing the online application form

If you have selected to enter the details yourself, you will be taken to the following screen offering links to the online application pages.



### Application Forms

#### Application Forms To Complete

Below is a list of all the applications associated with the Application.

Clicking on an Applicant will open the Application Form in a new window.

| Applicant                  | Status                           |
|----------------------------|----------------------------------|
| <a href="#">Tommy Test</a> | Please submit Application Form   |
| Tina Test                  | Application Form being processed |

[Back to Home](#)

Once you have completed the first application form, you will be required to refresh the page in order to access the application report.

Please click '**Interim report is available**' to complete the second application form .



**Application Forms**

**Application Forms To Complete**

Below is a list of all the applications associated with the Application.

Clicking on an Applicant will open the Application Form in a new window.

| Applicant         | Status                                      |
|-------------------|---------------------------------------------|
| <b>Tommy Test</b> | Please submit Application Form              |
| Tina Test         | <a href="#">Interim report is available</a> |

[Back to Home](#)

Click on the name of the tenant that you are entering the application details for.

The following window will be displayed.

**Application Form for Tina Test**

**Sections**

About You  
Employment Details  
Affordability Details  
Bank Details  
Next of Kin Information  
Additional Information  
Documents  
Consent

**Support**

Frequently Asked  
Questions

**Navigation**

[Back to Application](#)

**Property Information**

Riverleen House  
  
Electric Avenue  
NOTTINGHAM  
  
NG80 1RH

**Rental Information**

**Total Monthly Rental Amount:** £1000  
**Applicant Share of Rent:** £500  
**Tenancy Term:** 12 months  
**Tenancy Start Date:** 3 Dec 2012

**About You**

**Title**  
Mrs

**First Name**  
Tina

**Middle Names**

**Last Name**  
Test

**Personal Details**

**Date of Birth**

## Address History

For the address section to be accepted we require 3 years of history. Enter the date the applicant moved to the current address.

Address History

Please supply details of your current and previous addresses covering up to the last 3 years. Up to 3 addresses can be entered.

|               |                                                                      |
|---------------|----------------------------------------------------------------------|
| From          | <input type="text"/>                                                 |
| To            | <input type="text"/>                                                 |
| Living Status | <input type="text"/> ⓘ                                               |
| Flat          | <input type="text"/>                                                 |
| House Name    | <input type="text"/>                                                 |
| House Number  | <input type="text"/>                                                 |
| Postcode      | <input type="text"/> <input type="button" value="Lookup Address"/> ⓘ |
| Street        | <input type="text"/>                                                 |
| District      | <input type="text"/>                                                 |
| Town          | <input type="text"/>                                                 |
| County        | <input type="text"/>                                                 |
| Country       | <input type="text" value="United Kingdom"/>                          |

If the applicant has not lived at the current address for 3 years, the form will request details for another address. If the two addresses do not have a combined coverage of three years, a third address will be requested.

## Landlord Reference

If a Comprehensive report has been selected and the tenant has lived in rented accommodation, details of the landlord will be required. This is so that a reference can be requested to establish if the rent was paid to terms and the property was well maintained.

## Employment Details

A Comprehensive report will require an income reference to validate the income stated. We need this to confirm the affordability, e.g where the tenant is employed and details of the employer will be requested.

Pensioners will be requested for proof of pension details of their pension provider.

**Employment Details**

Please select your employment type from the dropdown below ⓘ

Select

**Occupation**

**Employment Status**

**Affordability Details**

**Gross Annual Income (£)**

 ⓘ

☐ Tick here if you have any additional sources of income

Affordability Decision:

Calculate Affordability

If required, please enter your bank details as follows.

**Bank Details**

**Current Account Held?**

☒ Yes ☐ No / Not Provided

**Number Of Credit Cards Held**

**Sort Code**

-  -

Find Sort Code

**Account Number**

**Account Name**

 ⓘ

**Name of Bank**

**Bank Address**

**Time With Bank**

Years  Months

Once all of your bank account information has been completed, you are at the final stage of submitting the personal information.

**Next of Kin Information**

**First Name**

**Last Name**

**Relationship**

**Additional Information**

**Have you ever received any County Court Judgments or Individual Voluntary Arrangements against you?**  
☐ Yes ☐ No ☒ Not Asked

**Have you ever been declared bankrupt?**  
☐ Yes ☐ No ☒ Not Asked

**Will any pets be kept at the property?**  
☐ Yes ☐ No

**Will there be smoking at the property?**  
☐ Yes ☐ No

**Will there be any children at the property?**  
☐ Yes ☐ No

## Consent and Submitting the Application Form

In the '**Consent**' section you will find a link to our Privacy Policy. Before the application can be submitted you must agree to the Privacy Policy by ticking the box.

In order to complete the application all of the required fields must be entered correctly, followed by clicking '**Submit Application Form**'.

If for any reason you need to come back to the application at another time, you can click '**Save For Later**' so you do not lose any of the details you have entered.

**Consent**

**I declare that:**

- The applicant has consented that we will use information provided to us by third parties to make decisions about their application
- We have informed the applicant that credit reference agencies may supply to us, public information and fraud prevention information
- The applicant has been advised that a search "footprint" will be recorded on their credit report; this will not affect their ability to obtain credit in the future
- The applicant has agreed to Experian processing their data in accordance with the Use of Personal Information policy and has been advised of the details in this policy.

☐ By proceeding with this application you confirm that you have advised the applicant of how their data may be used as described above

Endsleigh offer specialist contents insurance for all kinds of tenants. As an additional service we'll contact your tenant once their application is complete to discuss their insurance needs. Please note - Endsleigh won't pass this data on to any 3rd parties. If the applicant would prefer not to be contacted by Endsleigh about insurance, please un-tick here ☒

Submit Application Form

Save For Later

Print

## Letter of Agreement

The letter of agreement will be requested when references are required. This is also the option of 'No LOA'; if this radio button is selected Experian will not chase yourself or the applicant for this document unless a referee requests it.

## Acceptable Document Types

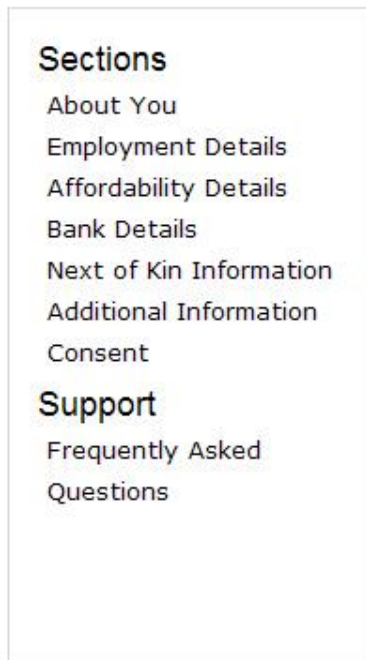
The system will accept the following document types:

- TIF
- PNG
- JPEG
- GIF
- Bitmap
- Word documents
- PDF

## Navigation Tool

To go back to any part of the application you can scroll to the relevant section.

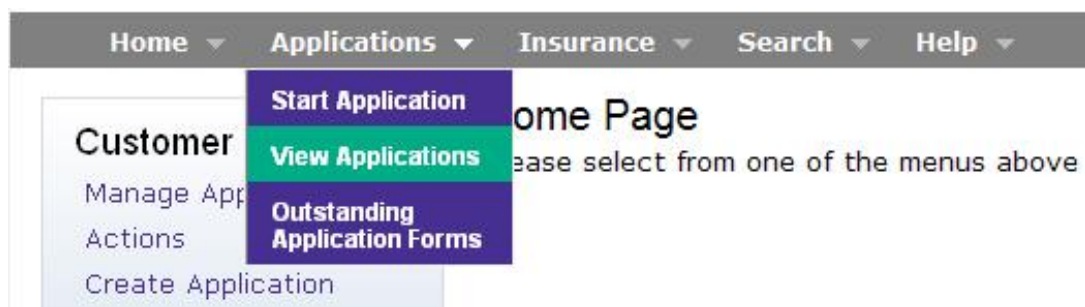
Alternatively on the left hand side of the application form there is a navigation tool called '**Sections**'. You can click any of the links below to go back to the section you require.



For additional '**Support**', visit our '**Frequently Asked Questions**' section.

## Viewing Applications

To view any application cases once they have been initiated, in progress or finished, click '**Applications**' followed by '**View Applications**'.



Tenancies that have been initiated will be displayed on the following screen.

Tenancy Application List

|      | Application ID | Property Address                 | Branch             | Requestor   | Status      |
|------|----------------|----------------------------------|--------------------|-------------|-------------|
|      |                |                                  |                    |             | -- All --   |
| + 44 |                | Embankment House Electric Avenue | Endsleigh Customer | lewis nixon | In Progress |
| + 37 |                | Riverleen House Electric Avenue  | Endsleigh Customer | lewis nixon | Finished    |

Clicking on a the '+' button will provide you with the list of applicants within the '**Application ID**'.

Clicking on a specific name will enable you to see an update of the progress for the particular application.

## The Application Form and the Reports

### The Application Form

To view the original information provided about the applicant; this is accessible by clicking on the applicant's name.

Home ▾

Applications ▾

Insurance ▾

Search ▾

Help ▾

Application Actions

Applications

List All Applications

Create Application

See Also

Home

Riverleen House Electric Avenue

Customer Information

Customer Name

Endsleigh Customer

Branch

Endsleigh Customer

Application Information

Case Status

Finished

Property Information

Property Address

Riverleen House

Electric Avenue

NOTTINGHAM

NG80 1RH

United Kingdom

### Interim Report

Once the applicants details have been returned from the bureau, a password protected interim report will be sent to the email address/fax number provided to Experian.

To view either an updated Interim Report or a completed Final Report select, '**View Application Report**' from the case summary screen and a report will be displayed where all the details that have been confirmed will be shown.

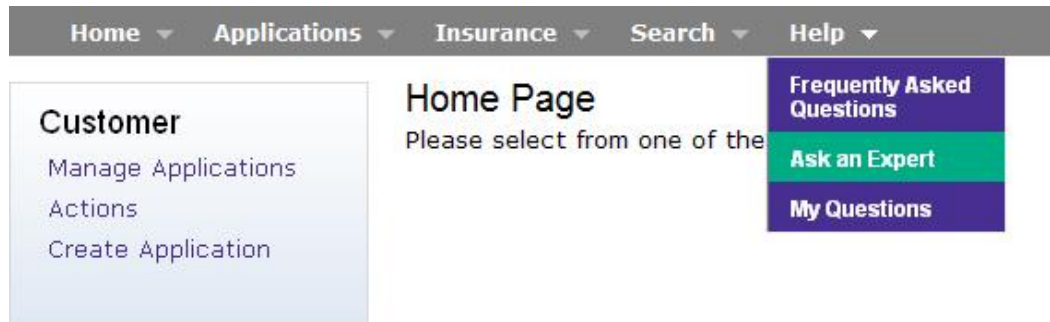


## Ask an Expert

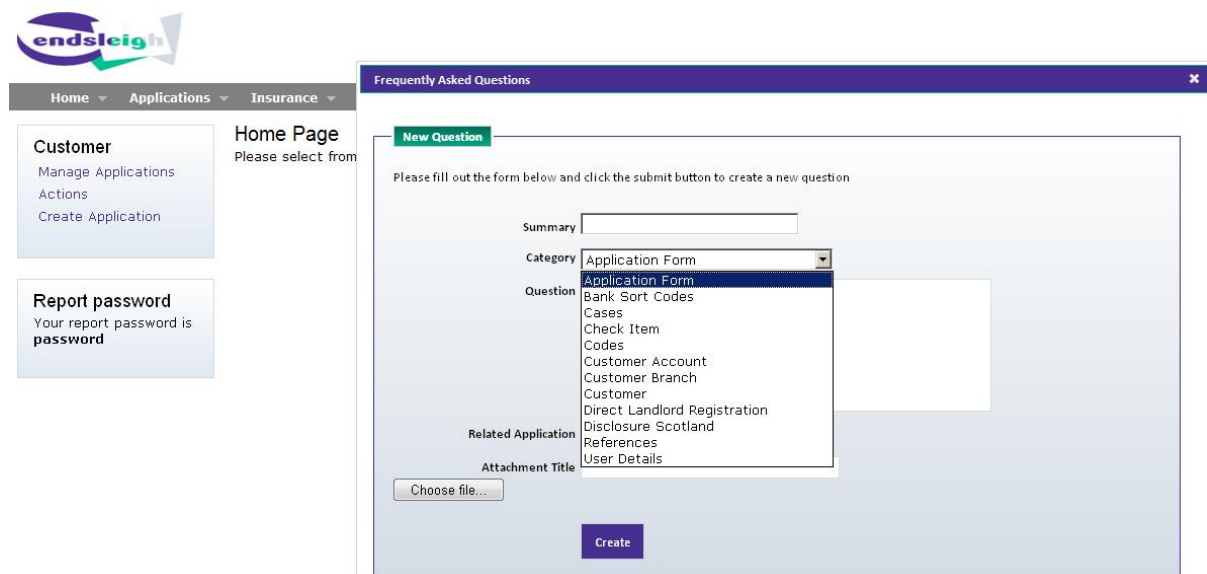
### Ask an Expert

Using the Ask an Expert functionality means rather than picking up the phone to our Support Team you can send questions to them and receive a response back within 2 hours.

To do this click on the '**Ask an Expert**' link within the Help tab.



A box will appear for you to enter your question. Enter a Summary for the question and select a Category from the dropdown list.



Within the Question field, type your question and provide as much information as possible. For example if your question is regarding a specific application please provide the application id and applicants name.

Frequently Asked Questions

New Question

Please fill out the form below and click the submit button to create a new question

Summary

Category

Application Form

Question

Hello,  
  
When completing the application form I am having problems with loading some of my personal information.  
  
The system doesnt accept my current place of residence.

Related Application

Tommy Test (Embankment House,

Attachment Title

Choose file...

Create

By clicking on the Related Application dropdown list you can select which applicant your question relates to.

When you have provided all the relevant information and are ready to submit the question click on the Create button.

Frequently Asked Questions

Question Submitted

The reference number for your question is '3'.

You should receive a response by email from our support department within the next 2 hours.

If you need to add information to, or cancel, your question, you can do so by updating it through the 'My Questions' sub area of the 'Help' section of this site.

You will receive a confirmation page that says '**Question Submitted**' and provides you with a Support reference number.

To exit the question click on the X in the top right hand corner.

## My Questions

Within My Questions you can look at any questions you have previously asked, see what the status of your questions are, update your question and add attachments.

Home

Applications

Insurance

Search

Help

My Questions

List My Questions

See Also

Home

My Questions

My Questions

| ID | Category         | Summary         | Related To                                        | Status            | Last Updated By | Deadline          | Action                                                           |
|----|------------------|-----------------|---------------------------------------------------|-------------------|-----------------|-------------------|------------------------------------------------------------------|
| 2  | Application Form | Applicants Name | 70, Embankment House, Electric Avenue, NOTTINGHAM | Waiting On Expert |                 | 30 Nov 2012 13:29 | <a href="#">Click to view</a><br><a href="#">Click to update</a> |
| 3  | Application Form | Applicants Name | 70, Embankment House, Electric Avenue, NOTTINGHAM | Waiting On Expert |                 | 30 Nov 2012 13:31 | <a href="#">Click to view</a><br><a href="#">Click to update</a> |

Under Action click to view or click to update your question.

To view the related application click on the applicants name.

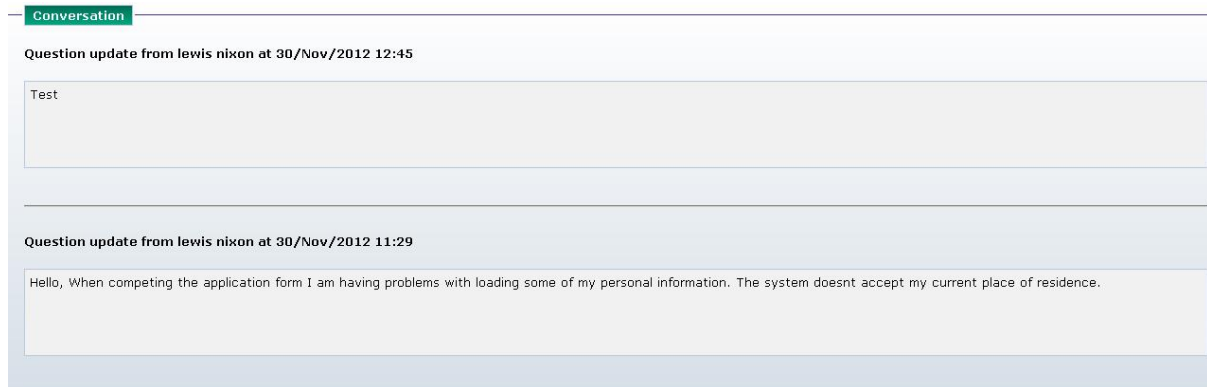
| Home Applications Insurance Search Help                                      |                                                                                                                                                                       |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| My Questions<br>List My Questions                                            |                                                                                                                                                                       |
| See Also<br>Home                                                             |                                                                                                                                                                       |
| My Question Details                                                          |                                                                                                                                                                       |
| ID                                                                           | 2                                                                                                                                                                     |
| Summary                                                                      | Applicants Name                                                                                                                                                       |
| Category                                                                     | Application Form                                                                                                                                                      |
| Created                                                                      | Fri 30 Nov 2012 11:29                                                                                                                                                 |
| Deadline                                                                     | Fri 30 Nov 2012 13:29                                                                                                                                                 |
| Status                                                                       | Waiting On Expert                                                                                                                                                     |
| Question                                                                     | Hello, When competing the application form I am having problems with loading some of my personal information. The system doesnt accept my current place of residence. |
| Click <a href="#">here</a> to open the screen where you asked your question. |                                                                                                                                                                       |

Within My Question Details you can see the details you sent through on the original question, when the question was created, the deadline for the Support Team to respond and the Status of it.

| Conversation                                                                                                                                                          |                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| New Comment                                                                                                                                                           |                                          |
| Comment                                                                                                                                                               | <input type="text"/>                     |
| Status                                                                                                                                                                | Waiting On Expert                        |
| Attachment Title                                                                                                                                                      | <input type="text"/>                     |
|                                                                                                                                                                       | <input type="button" value="Browse..."/> |
| <input type="button" value="Add New Comment"/> <input type="button" value="Cancel"/>                                                                                  |                                          |
| Question update from lewis nixon at 30/Nov/2012 11:29                                                                                                                 |                                          |
| Hello, When competing the application form I am having problems with loading some of my personal information. The system doesnt accept my current place of residence. |                                          |

To update your question further you can add more details to the Comments box.

If you would like to send through an attachment you can name the attachment in the Attachment Title field and to add the attachment click on the browse button. Then click on Add New Comment.



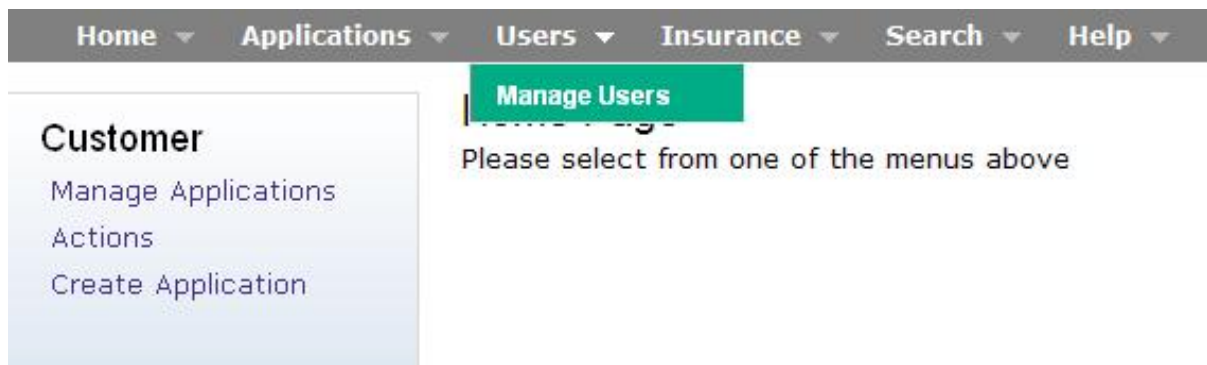
The screenshot shows a 'Conversation' tab with a list of messages. The first message is a system update: 'Question update from lewis nixon at 30/Nov/2012 12:45' with a text box containing 'Test'. The second message is another system update: 'Question update from lewis nixon at 30/Nov/2012 11:29' with a text box containing the text: 'Hello, When completing the application form I am having problems with loading some of my personal information. The system doesnt accept my current place of residence.'

To view the conversation history within any of your questions, from **'My Questions'** click on 'click to view' under Actions.

## Adding and Managing Users

### Users Tab

If a user is set up as an administrator then they will also be able to access the users tab where they can create and manage users.



The screenshot shows the 'Users' tab in a navigation menu. Below the menu, there is a 'Customer' section with links for 'Manage Applications', 'Actions', and 'Create Application'. To the right, there is a green button labeled 'Manage Users' and a message that says 'Please select from one of the menus above'.

### User Permissions

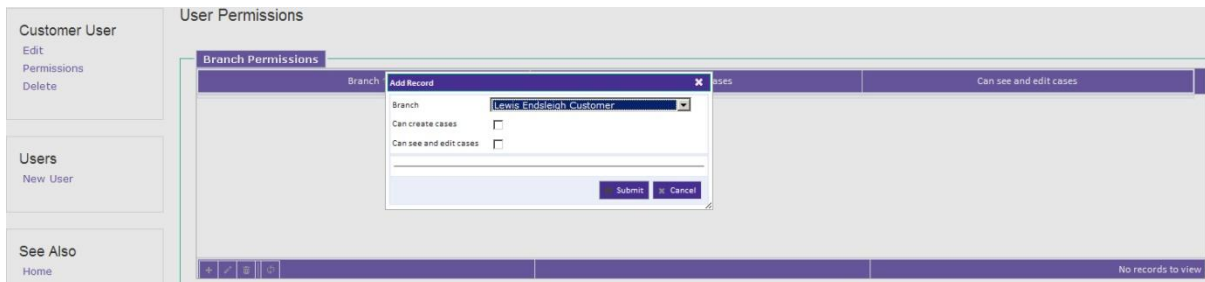
If you have additional branches or additional users that you would like to link the user to, this can be managed from the User Permissions tab. **Branch Permissions**

If you would like to link a user to branches to create, see and edit cases then press the **'plus'** symbol and this will bring up the Add Record screen:

If you would like the user to view all cases for their own branch then select their own branch from the drop down. Please select the relevant tick box depending on what the user is allowed to do and then click the **'Submit'** button.

If you would like the user to view all cases for different branches then select that branch from the Branch list.

To edit a branch click on the pencil icon. To delete a branch click on the 'dust bin' icon.



The screenshot shows the 'User Permissions' interface. On the left, there's a sidebar with 'Customer User' (Edit, Permissions, Delete), 'Users' (New User), and 'See Also' (Home). The main area is titled 'User Permissions' and has a 'Branch Permissions' tab. An 'Add Record' modal is open, showing a 'Branch' dropdown menu with 'Lewis Endleigh Customer' selected. Below the dropdown are two checkboxes: 'Can create cases' and 'Can see and edit cases', both of which are unchecked. At the bottom of the modal are 'Submit' and 'Cancel' buttons. The background table has columns for 'Branch', 'Cases', and 'Can see and edit cases'. The table is currently empty, showing 'No records to view' at the bottom right.

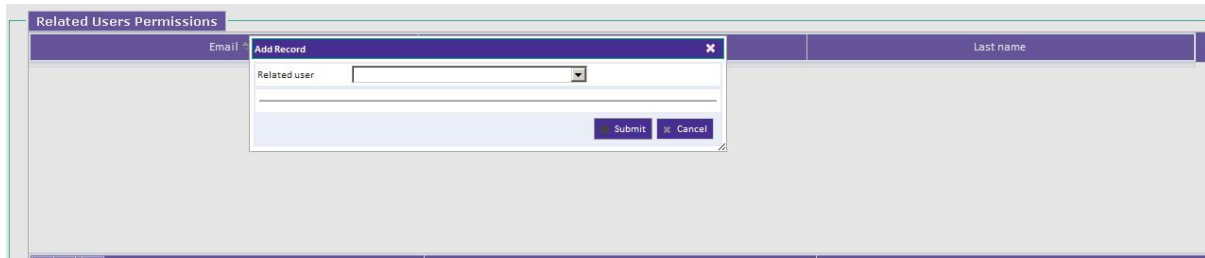
## Related User Permissions

If you would like the user to only be linked to specific users then you can use the Related User Permissions section as shown below:

If you click on the '**Add**' button it will display the Add Record screen as shown below:

Once you've selected the required Related User then click on the '**Submit**' button.

If you want to edit user permission details then please click on the pencil icon and if you want to delete a branch then click on the delete icon.



The screenshot shows the 'Related Users Permissions' interface. It has a table with columns for 'Email' and 'Last name'. An 'Add Record' modal is open, showing a 'Related user' dropdown menu. At the bottom of the modal are 'Submit' and 'Cancel' buttons. The background table is currently empty.

## Edit My Details

To edit any of your user details click on your user name, this can be found in the top right hand corner of the Customer Home Page as shown below:

You are able to update your name and email address, along with your memorable word and security questions. If any changes are made, click '**Save**' and this will update immediately.

## Change Password

To change your password, select '**Change Password**' from the dropdown under your user name. Fill in the required fields (old & new password) and click '**Change Password**' to update this.



## Logout

It is possible to logout through clicking the '**Home**' tab followed by '**Logout**' or by using the '**Welcome**' tab on the far right of the screen.

