Partner Tools - Quick Guide

Go-Links, Policy & Quote Search Functions

Why Partner Tools and Go-Links are a Game-Changer

The new Partner Tools dashboard gives advisors more control, insight, and earning potential than ever before. With Go-Links, you can share personalised booking links with clients or groups, track every sale back to you, and even run campaigns with exclusive discounts.

It's an effortless way to grow your travel insurance revenue, streamline your admin, and deliver a smoother experience for your clients.

What's new

- **Partner Tools dashboard:** Faster access to quotes, policies, and account settings.
- **Go-Links:** Personalised booking links you can share with clients or groups.
- **Updated Policy and Quote Search:** Filter by date, Trip File, traveller name, trip type, email, or phone.

Accessing Partner Tools

After logging into the Oskar, click **Partner Tools** from the top menu next to **Start a Quote**.

From there, you can:

- View policies issued through your Go-Links
- Create and manage your own Go-Links
- Access Go-Link Email Settings
- Search quotes and policies
- Update your password under Account Settings

Your Personal Go-Link

- Go to **Partner Tools → Manage Go-Links**.
- You'll see your **unique, pre-populated Go-Link** – already linked to your advisor profile.
- Copy the URL or download the **QR code** for brochures, posters, or digital campaigns.
- All sales from your Go-Link are automatically tracked to you.

Creating Individual Go-Links

To create a Go-Link for a tour, group, or campaign:

- Navigate to **Partner Tools → Manage Go-Links → Add Go-Link**.
- Enter a **Reference** name (e.g. *MTA – Europe Tour Sep*).
- Decide if you'd like to offer a **Discount** (optional). Discounts are taken from your commission – the calculator helps you work it out.
    - Example: To offer travellers 15% off by giving up half your commission, enter **15** in the discount box. The calculator will show you to enter **50** in the **Commission Discount** field.
- Add a **Promo Code** (optional).
- Add additional **recipient emails** (optional), for example, a tour leader who should receive issued policy copies.
- Include a **Trip File / Client Ref** (optional) to make reconciliation easy.
- Choose how far clients can progress before review (optional) – you'll get a notification on your home page.
- Add a **Discount Expiry Date** if running a time-limited offer. The link still works after expiry, but the discount ends.
- Click **Save**. Your new Go-Link will appear in the list with a unique URL and downloadable QR code.

Viewing & Managing Policies/Quotes

- Navigate to **Partner Tools → Policies with Go-Links** to view and filter quotes and policies issued via your Go-Links.
- Filter by **status** (Ready for Review, In Progress, or Issued).
- You can **edit or add a Trip File / Client Ref** after a quote or policy has been issued – simply open the policy record and update the Trip File / Client Ref field.
- Use **Partner Tools → Policy and Quote Search** for detailed filtering by date, Trip File, traveller name, or contact details.

Email Settings and Notifications

- Go to **Partner Tools → Go-Link Email Settings**.
- Tick the box to **Email to Agent** when policies are issued (default).
- To stop automatic notifications, simply untick the box.

Let Your Go-Links Do the Hard Work

Think of your Go-Link as your own personal sales assistant, working quietly in the background, 24/7. Every time a traveller uses your link to buy a policy, it's automatically tracked, issued, and credited to you.

No follow-ups. No extra admin. Just simple, consistent revenue from the trips you're already booking.

Share your Go-Link in emails, itineraries, confirmation messages, or even as a QR code on brochures and posters. The more places you share it, the more it works for you — turning every client interaction into an opportunity to earn.

Click here to watch Reggie show you how it works

Make your Go-Links work even harder

Once you've set up your Go-Link, think about where it fits naturally into your everyday conversations and client touchpoints. A few small habits can add up to serious extra revenue.

Easy ways to share your Go-Link:

- In every itinerary or confirmation email. Add a line such as "You can arrange your travel insurance quickly here" and link your Go-Link.
- In your email signature. A subtle "Get a quote in minutes" link means every message you send can lead to a sale.
- On your social media. Post reminders before key travel seasons, school holidays, or events—include your link so followers can book instantly.
- In post-booking follow-ups. When clients finalise a trip, include your Go-Link as part of their checklist: flights, accommodation, insurance.
- For groups or tours. Create a custom Go-Link and QR code for the group so every traveller's purchase tracks back to you.

The more you share your Go-Link, the more opportunities you create for commission—without chasing quotes or managing extra admin.

Important: Always provide factual information only and do not recommend or compare travel insurance products. Instead, refer travellers to the Product Disclosure Statement (PDS) or Policy Wording and remind them to consider whether the product meets their needs.

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