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 you 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 leisure 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. *Europe Group Tour Sep*).
- Decide if you'd like to offer a **Discount** (optional). Discounts are taken from your brokerage – the calculator helps you work it out.
    - Example: If you'd like to offer your clients a 10% discount to the total pre-tax premium, enter 15 in the first box. The calculator will then show the amount to place in the Commission Discount box.
- 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

Your Go-Link acts like a quiet assistant in the background, available around the clock. When a traveller buys a policy through your link, the sale is tracked, issued, and credited to you automatically.

No follow-ups. No extra admin. Just steady brokerage.

You can include your Go-Link in emails, itineraries, confirmations, or as a QR code on brochures and posters. The more places it appears, the more chances it has to work for you by turning routine interactions into revenue.

[Click here to watch Reggie show you how it works]

Make your Go-Links work even harder

Once your Go-Link is set up, think about where it fits naturally into your usual workflow. Small, consistent habits can make a noticeable difference over time.

Easy ways to share your Go-Link:

- Add it to every itinerary or confirmation email. A simple line such as “You can arrange your travel insurance here” works well.
- Include it in your email signature so every message becomes an opportunity for a client to get a quick quote.
- Post it on your social channels, especially before peak seasons, school holidays, or major events.
- Add it to post-booking checklists when travellers have finalised their plans.
- Use a dedicated Go-Link and QR code for groups or tours so each traveller’s purchase is captured for you.

The more consistently your Go-Link appears in your regular communication, the more opportunities you create to earn without adding extra workload.