

## Client Portal Client Guidance

## Create a password

Follow the link in the email received, you will be prompted to create a password

|                   |  | Remembrance Pages                  | Portal Guide | Contact Us | Bereavement Support | Urns and Keepsakes |
|-------------------|--|------------------------------------|--------------|------------|---------------------|--------------------|
| Set Password      |  |                                    |              |            |                     |                    |
|                   | Passwords must be:  • At least 6 characters long • Must contain at least one low • Must contain at least one upp • Must contain at least one nur  Password  Confirm Password  Set password | ver case letter<br>per case letter |              |            |                     |                    |
| Funeral Directors | Terms & Conditions   | Customer Se                        | rvices       |            | Address             | 5                  |

## Login

Once a password has been created, login using your Arrangement Reference, User name and password

|                   |   |                | Remembrance Pages | Portal Guide | Contact Us | Bereavement Support | Urns and Keepsakes |  |
|-------------------|---|----------------|-------------------|--------------|------------|---------------------|--------------------|--|
| Log in            |   |                |                   |              |            |                     |                    |  |
|                   | Please enter your account details and arrangement reference |                |                   |              |            |                     |                    |  |
|                   | Arrangement Reference                                       | 123-45678      |                   |              |            |                     |                    |  |
|                   | User name   | Email Address  |                   |              |            |                     |                    |  |
|                   | Password  |                |                   |              |            |                     |                    |  |
|                   | Remember me   |                |                   |              |            |                     |                    |  |
|                   | Log in  | Reset password |                   |              |            |                     |                    |  |
|                   |   |                |                   |              |            |                     |                    |  |
|                   |   |                |                   |              |            |                     |                    |  |
|                   |   |                |                   |              |            |                     |                    |  |
|                   |   |                |                   |              |            |                     |                    |  |
| Funeral Directors | Terms & Conditions  | Customer       | Services          |              |            | Address             |                    |  |
|                   |   |                |                   |              |            |                     |                    |  |

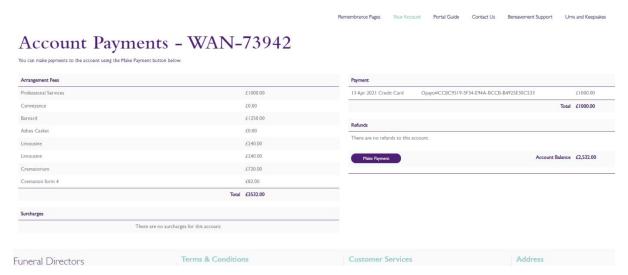
The link to create a password only works once, once created go to main website to login to the Client portal

## Your Account

Once logged into the Client portal select 'Your Account' from the main menu







The funeral charges including disbursements are displayed, any payments made and an up to date 'Account Balance'

To make a payment select 'Make Payment', amend the 'Payment Amount' if the full balance is not being paid then select 'Pay Now'

Complete the fields and select 'Pay'

|              |                   | Remembrance Pages | Your Account | Portal Guide | Contact Us | Bereavement Support | Urns and Keepsakes |
|--------------|-------------------|-------------------|--------------|--------------|------------|---------------------|--------------------|
| Make Payment |                   |                   |              |              |            |                     |                    |
|              | Billing Address   |                   |              |              |            |                     |                    |
|              | Address Line I    |                   |              | *            |            |                     |                    |
|              | Town/City         |                   |              | *            |            |                     |                    |
|              | Postcode          | * United Kingdom  |              | •            |            |                     |                    |
|              | Card Details      |                   |              |              |            |                     |                    |
|              | Card Holder Name  |                   |              | *            |            |                     |                    |
|              | Card Number       |                   |              | *            |            |                     |                    |
|              | Exp MM 💙 Exp YY 💙 | CW                | *            |              |            |                     |                    |
|              | Opayo             | •                 | v            | SA           |            |                     |                    |
|              |                   |                   | Pay          | £2,532.00    |            |                     |                    |

An automatic email receipt is issued and the Funeral Director is notified of your payment

