

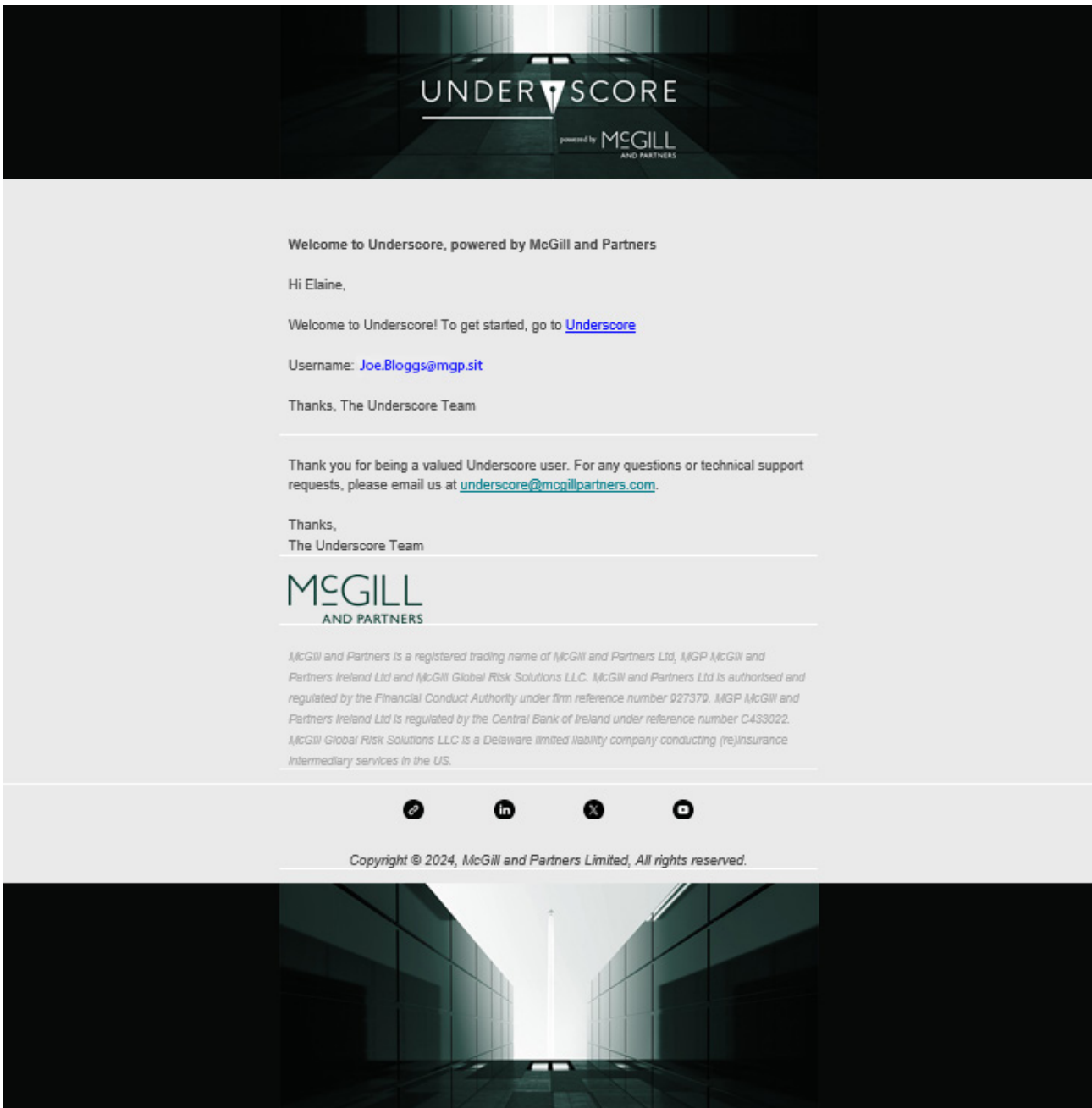
# Using Underscore 2024



# STEP 1



You would have received the following Welcome email to the new Underscore platform, please Click the Underscore link:



# STEP 2



This will take you to a page where you will be asked to agree (select **checkbox** and **agree and proceed**) with the Terms & Conditions as shown below:

**Underscore - User Agreement**

**Please read these terms carefully before entering the Underscore web portal (“Underscore”). By using Underscore, you confirm your agreement to be bound by these terms. Before being provided with access to Underscore for the first time you are required to click “Accept” to indicate your acceptance of these terms. If you do not accept these terms you will not be able to use Underscore.**

Underscore is accessible via a private website which is hosted by Salesforce UK Ltd, owned and controlled by McGill and Partners Services Ltd, a company incorporated in England and Wales, under registration number 11877390, with a registered office at Suite 806 Lloyd's 1 Lime Street, London, England, EC3M 7HA (“**MGP Services**”). Underscore is made available to you by McGill and Partners Ltd (“**McGill and Partners**”), an affiliate of MGP Services. McGill and Partners is a company authorised and regulated by the Financial Conduct Authority, under firm reference number 927379, to carry on insurance and reinsurance distribution activities. Access to Underscore is provided to Authorised Users only and is subject to these terms and conditions of use (the “**Terms**”).

**1. DEFINITIONS AND INTERPRETATION**

1.1. In these Terms the following expressions have the following meanings:

“**Affiliates**” means any company (be it a subsidiary, sister or parent corporate entity) within the McGill and Partners group of companies.

These Terms are personal to you and you therefore agree not to assign, subcontract or otherwise transfer any of your obligations under these Terms without the prior written consent of McGill and Partners, such consent not to be unreasonably withheld or delayed.

**16. GOVERNING LAW AND JURISDICTION**

These Terms shall be governed by and construed in accordance with the laws of England and Wales and you hereby submit to the exclusive jurisdiction of the courts of England and Wales.

**McGill and Partners**  
June 2023


acknowledge that I have read, and do hereby accept the terms and conditions contained within

Logout
Agree and Proceed

# STEP 3



You will then be prompted to set up a new password using the criteria set out below:



## Change Your Password

Enter a new password for **elaine.bramall@mgp.sit**.  
Make sure to include at least:

- 8 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character ⓘ


\* New Password

\* Confirm New Password

**Change Password**

Password was last changed on 18/01/2024, 14:55.

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## Change Your Password

Enter a new password for **elaine.bramall@mgp.sit**.  
Make sure to include at least:

- 8 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character ⓘ

\* New Password

Good

\* Confirm New Password

Match

**Change Password**

Password was last changed on 18/01/2024, 14:55.

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# STEP 4



Once your password has been successfully changed you will be redirected to the portal as a logged-in user and presented with the following screen:

The screenshot shows the Underscore user portal. At the top left is the 'UNDERScore' logo. At the top right is a search icon and the user name 'Elsine Bramall Futureform'. The main content area features a welcome message: 'Welcome to Underscore, the Digital Insurance Platform from McGill and Partners'. To the right of this message is a dark green button labeled 'Create a New Quote'. Below the welcome message is a section titled 'Your Risks'. Under this section is a horizontal menu of filter tabs: 'All', 'Draft', 'Submitted', 'Quoted', 'Quote Accepted', 'Bound', 'Not Taken Up', 'Quote Declined', and 'Expired'. The 'All' tab is currently selected. Below the tabs, the text reads: 'There are no Quotes that meet this criteria.'

Multi Factor Authentication (MFA) will be required to login to Underscore once the initial login is successful. This can be done using your existing Okta authenticator or any other authenticator.

The following instructions provide a step-by-step guide to complete authentication with MFA:

## STEP 1



When logging in to Underscore (after the initial set-up), once you have entered your email address and password, you will be redirected to an authentication page. The default authenticator is 'Salesforce authenticator', however you can continue to use Okta or any other authenticator using the option '**Choose Another Authentication Method**' in the lower part of the screen (as shown in the second image below).



# STEP 1 (CONTINUED)



## Connect Salesforce Authenticator

For security reasons, you have to connect Salesforce Authenticator to your account. The app sends a notification when we need to verify your identity, and you verify with just a tap. You can also enable location services to have the app verify you automatically from trusted locations. The app provides codes to use as an alternate verification method.

1. Install Salesforce Authenticator on your mobile device from the [App Store](#) or [Google Play](#).
2. Open Salesforce Authenticator and add your account.
3. The app shows a two-word phrase. Enter the phrase here.

Two-Word Phrase

Cancel

Connect

[Choose Another Verification Method](#)

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## Choose a Verification Method

How would you like to verify your identity?

- Use the Salesforce Authenticator mobile app
- Use verification codes from an authenticator app (such as Google Authenticator or Authy)

Continue

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## STEP 2



Follow the instructions on the screen below and once the connection is successful, you will be redirected to the Underscore home page.


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## Connect an Authenticator App

Connect a third-party authenticator app to your Salesforce account so you can use it to verify your identity.

1. Open an authenticator app.
2. Scan this QR code with the authenticator app.
3. Enter the code generated by the app.



Verification Code

BackConnect

[I Can't Scan the QR Code](#)

[Choose Another Verification Method](#)

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