

Is there any change to Client Portal's functionality by switching to the new InsurLink UI?

You will not lose any of the Client Portal feature functionality after the switch to the InsurLink UI. The new UI provides a more modern, clean user experience and is more cohesive with the InsurLink mobile app. All the default Client Portal tabs are still fully functional in the new UI, and you can still add up to 100 custom content tabs.

Will I lose any of my data/information?

No – all data, policy information, documents, etc. will remain intact

Is there a price difference after this migration?

No

Is the InsurLink UI still customizable?

Absolutely! You can still edit the colors, add logos, banner images, and customize the experience for each user. The only difference is that you cannot choose font colors anymore, but we do plan on adding that back in the future. For now, we recommend choosing a navigation bar/background color that is not white, because the font defaults to white.

Am I able to switch back to the Client Portal UI after this?

No, the Client Portal UI is being removed.

Are there any best practices to ensure the new UI looks great for my agency?

All your branding will automatically transfer over to the new UI, but please note that the font color will default to white on the new UI in the side navigation bar. When setting up the background color in the templates, we recommend you choose a darker brand color so that the white text will appear.