

Digital Personal Information Form (PIF) manual

This manual explains how you can use the PIF functionality in the partner portal



Overview:

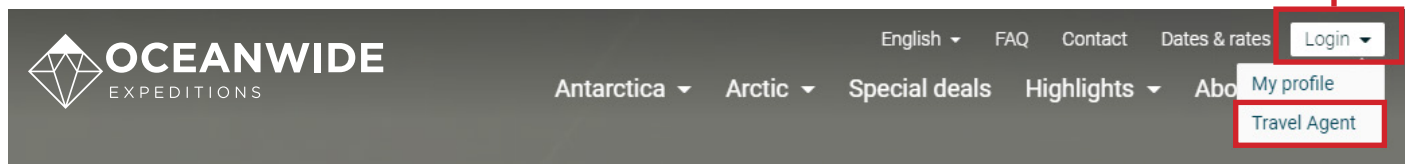
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Login to the Partner Portal



If you do not have an account yet, please click on "Register now"

Sign in form. The form has fields for Email address and Password, a Forgot your password? link, and a Sign in button. Below the form is a No account yet? section with a Register now button. Red lines connect the text instructions to the Register now button and the Sign in button.

When you lose track of your password, click "Forgot your password?"

Sign in form. The form has fields for Email address and Password, a Forgot your password? link, and a Sign in button. Below the form is a No account yet? section with a Register now button. Red lines connect the text instructions to the Forgot your password? link and the Sign in button.

If you already have an account, click "Sign in"

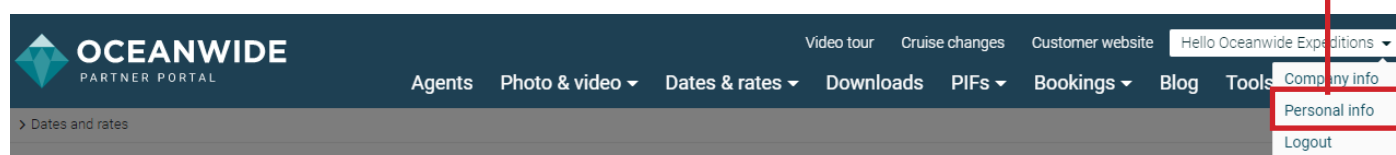
If you do not have an agent account, click "Become a partner now"

Registration form. The form has fields for Email and Plain password, checkboxes for I agree to Oceanwide Expeditions Terms & Conditions and I agree to Oceanwide Expeditions Privacy Policy, a reCAPTCHA widget, and a Register now button. Below the form are sections for Already have an account? with a Sign in button, and Are you a travel agent? with a Become partner now button. Red lines connect the text instructions to the Sign in button and the Become partner now button.



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Check and edit personal details

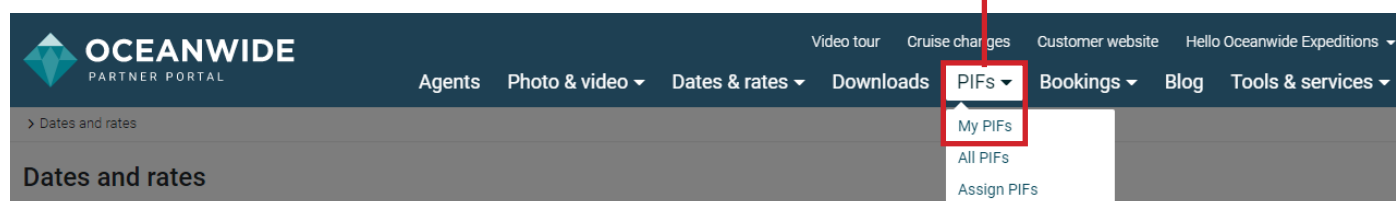


Your agent details show your personal details on the PIF and in email messages to your clients. Make sure to add your logo and personal details:

- Agency name
- First name
- Last name
- Website URL
- Phone number
- Address

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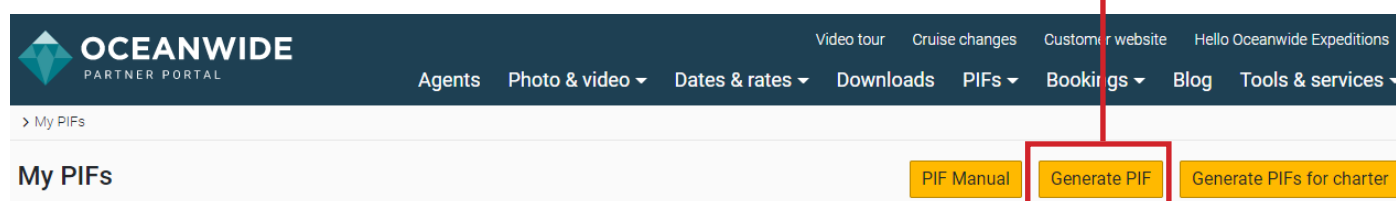
Go to PIFs > My PIFs



4

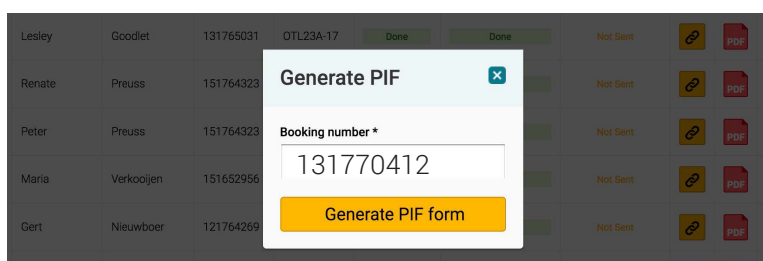
Generate PIF

You can generate PIF's with the Oceanwide Expeditions booking numbers. Click on the yellow button "Generate PIF":



and provide the booking number (9digit code):

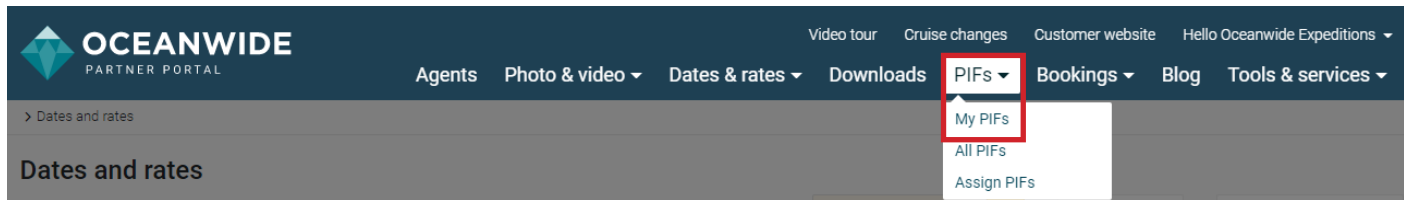
EXAMPLE: The booking number you see in the invoice is **131770412-01**. Only the first 9 digits (**131770412**) should be used, hyphen and numbers coming after it, should not be entered in the field.



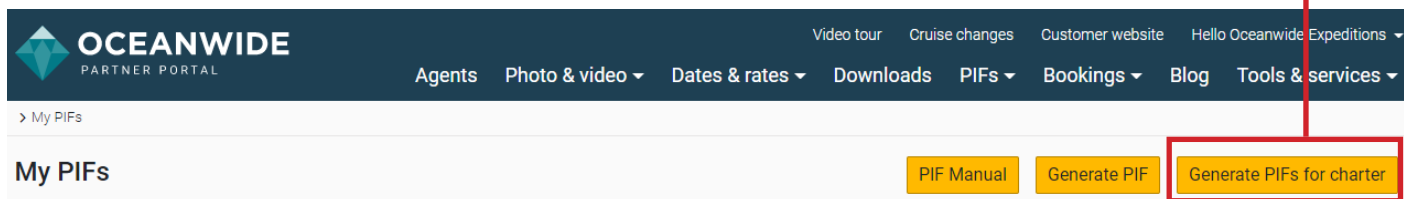
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Generate PIFs in bulk

Generating PIFs one client at a time is not so time consuming for traditional bookings, but what about your (block) charters? Now you can save yourself some tedium by generating PIFs in bulk.



On the following page, select "Generate PIFs for charter":



In the menu that appears, enter the Oceanwide tripcode and number of PIFs you want to generate. You can also click the up or down arrows to generate more or fewer PIFs.

 A screenshot of the 'Generate PIF's for charter' modal form. The form has a title bar with a close button. It contains two input fields: 'Tripcode *' and 'Count *'. Below the input fields is a yellow button labeled 'Generate PIF's'.

You now have the desired number of PIFs, which can be sent to your clients.

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PIF(s) generated

Based on the booking code, PIFs are generated for all booked clients (up to four).

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My PIFs functionality

You will see all your clients PIFs on the My PIFs page:

My PIFs

PIF ManualGenerate PIFGenerate PIFs for charter

#	First Name	Last Name	Booking number#	Trip code	Status	Email status	Link	PDF	Send email
	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<div>All</div>	<div>All</div>			
12345	John	Doe	131770412	OTL06-22	New	Sent			<div>Send</div>
12344	Jane	Doe	131770412	OTL06-22	New	Sent			<div>Send</div>

Fields

- First name: You can use the search box to filter by first name
- Last name: Or by last name
- Booking number: Search for a specific booking number here
- Trip codes: You can use this field to find a tripcode
- Status: New, draft, or done
 - New: Client hasn't done anything with it yet
 - Draft: Client has worked on the PIF, but saved it as a draft
 - Done: Client has sent the PIF
- Email status: Sent or not sent
 - Sent: A request has been sent to the client to fill in a PIF
 - Not sent: No request has been sent to the client to fill in a PIF (at least via the Oceanwide Expeditions portal)
- Link: Click on the link symbol to open the PIF and/or to copy/paste the form URL for your own use
- PDF: Click on the PDF symbol to generate a PDF file of the client's PIF

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Send email

Click on "Send" to open a screen to send the PIF to a client:

Send pif form (John Doe Booking #151653401)

Email

Send

You are able to adjust the email address here. After you click Send, an automatic email request goes out to the client on your behalf.

Email status

Mail status

You will then see a change in the status:

Sent



Your client will receive this email when you use the Oceanwide functionality:

Dear traveler,

Please complete the personal information form of **Client Name**
[Personal information form](#)

All passengers traveling to the Arctic or Antarctica are required by the Association of Arctic Expeditions Cruise Operators (AECO) and the International Association of Antarctica Tour Operators (IAATO) to complete this form.

We advise that you bring a copy of the completed personal information form with you to the vessel.
 Thank you.

Best regards,
Agency Name

Information that is already known is auto-entered on the form. We also prefill your phone number so a client can contact you for help filling out the form. If you do not want to show your phone number, just leave the field empty on your personal details.

Personal Information form

Booking #151653401

Booking Information	
Booking number*	151653401
Trip code*	RVR30-16
Trip name*	East Greenland - Scoresby Sund, Aurora Borealis
Trip date*	2016-09-06
Agency name*	Test agency
Your Passport	
Title*	Mr.
First name*	Volodymyr
	<small>First name as it appears in your passport.</small>
Middle name	
Last name*	Elert
	<small>Last name as it appears in your passport.</small>

NEED ASSISTANCE WHILST FILLING OUT THIS FORM ?

Then call us: 234523452345234

YOUR DATA IS SAFE WITH US

- Your information is encrypted and transmitted without risk
- Your online PIF will be deleted 1 week after disembarkation
- Your personal information is only used to arrange your booking. 100% privacy guaranteed.



Data is protected with
SSL encryption

WHO SHOULD COMPLETE THIS FORM?

All travelers must complete parts 1 - 4. The more information Oceanwide Expeditions has, the more we may assist in the unlikely event of an emergency or provide medical assistance. All passengers traveling to the Arctic and Antarctica are required by the Association of Arctic Expedition Cruise Operators (AECO) and the International Association of Antarctica Tour Operators (IAATO) to



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11 Thank you page

The client receives a thank you after sending the PIF.

Thank you!

Your personal information form is sent.

IMPORTANT: if you have any doubts that you are not fit enough to participate in this voyage please consult your family doctor and / or physician and kindly ask him to fill out the **Medical Advisor's Opinion**. Please return the medical advisor's opinion via **your email address here**.

We advise that you bring a copy of the completed personal information form with you to the vessel.

Download

Print

12 Partner email: "PIF done"

The status will change to "Done" in the Partner Portal, and you will also receive a confirmation e-mail from Oceanwide with the client's PIF attached. If the PIF is filled out correctly, no further action is needed.

Personal information form done

Dear partner,

Matthshhs Aasks has completed his/her personal information form.
Please check if all questions are completed fully and truthfully, in the event of a medical emergency, the information provided could be crucial.
Thank you.

Oceanwide Expeditions

13 Privacy Policy Oceanwide Expeditions

We kindly ask you to read the Privacy Policy of Oceanwide Expeditions. When submitting the PIF form you automatically accept the Privacy Policy.