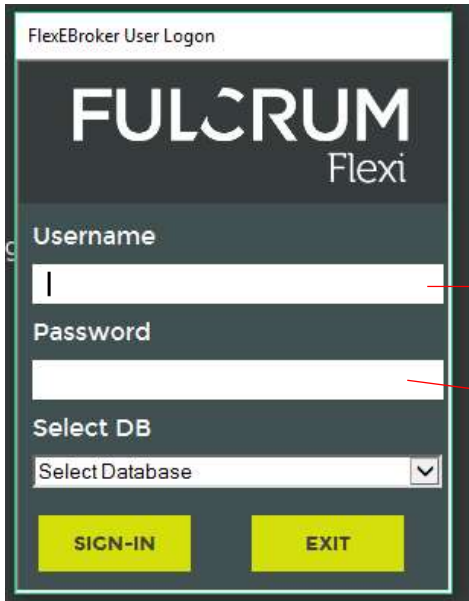


FLEXI

Step by step for claim registration on Flexi

1. Login on Flexi



FlexEBroker User Logon

FULCRUM
Flexi

Username
|

Password

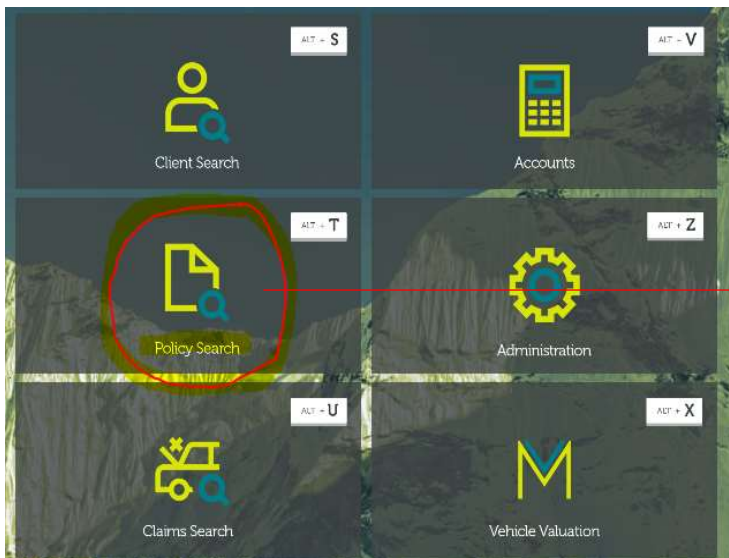
Select DB
Select Database

SIGN-IN **EXIT**

Name and surname

Password – this will be supplied

2. Select policy search



Click on the word policy search

3. Search for the policy – The reference is supplied by the broker or available on streamline

190086 9 Oct 2018 23 Jan 08:00 NatashaB Albert Claim for MIAMICANNERS on Policy MIAMI0010008 x(MIAMI0010008) x(ClaimsAdmin) x(TeamNatasha)

Mari 9 Oct 2018 'New Claim' Request for Claims from Mari

New Claim (9 Oct 2018)

Client? **MIAMICANNERS** Policy? **MIAMI0010008**

Please attach the signed Claim Form **NAUDEBROKER** Broker House

Broker **Louis** Insurance Company **Renasa**

Reference from streamline

search this on Flexi

Quick Find

Policy Reference **DIAGN001**

Search by Policy Reference

Find Now

Exit

Type the reference into the open space to search

Select find now to search for the policy or press enter after you typed the policy reference

4. View client for premium confirmation

Policy **DIAGN001/0001** Client **DIAGNOMAN CC**

Status **Active**

Header: Schedule Agents Insurers Insured Special Types

Insured: **DIAGNOMAN CC.**

Policy Type: **1670 - Renasa Commercial - Monthly** Profile: **Renasa MultmarkIII (Updated Nov 20 -**

Main Insurer: **Renasa Commercial - Monthly (RENNM3M)** Policy No: **RGAG69450/2872**

Agent: **MC Brokers - Burger Grobler Normaal** Multiple Agents: Take On: R/I?:

Previous Ref: **DIAGN001/0001**

Payment Frequency: **Monthly Paid in Advance to Broker** Premium Type: **Renewal Premium**

Inception Date: **01/03/2015** Effective Date: **01/09/2017**

Review Date: **01/03/2018** Effective/Endorsed: **31/07/2017**

Details: **156581 - ADDED CANON COPIER**

CURRENT	Future Debit	First/Endorse	Total
Premium:	9,947.81	0.00	9,947.81
Fees:	985.83	0.00	985.83
TOTAL:	10,933.64	0.00	10,933.64
Commission Content:	1,351.38	0.00	1,351.38
Binder Fee Content:	490.18	0.00	490.18

LAST DEBIT	Note Number	Policy Total	Endorsements	Total
	D1709	10,933.64	117.41	11,051.05

Debit Order: Assume Payment: View Diary entries: View Notes: Manage Documents:

Auto Email D/N: Claims: Send SMS: Send Email: View Email Log:

Amend **Previous** **Next** **Save** **Save & Exit** **Exit**

Add Policy **Endorse** **Print** **View Client** **Statutory Info** **Menu**

Click on the word – view client
a new screen will open if you click on the button

5. Premium confirmation page

Client **DIAGN001** DIAGNOMAN CC

Client Details Page 1 | Client Details Page 2 | Client Banking Details | Agent Details

Client Ref: **DIAGN001** Inception Date: **01/03/2015**

Name: **DIAGNOMAN CC** Title: Initial:

First Name: Attention: Contact: **Ernesto** Language: **English**

Postal Address: C/O MC BROKERS, PO BOX 307, POLOKWANE, 0699

Contact Numbers: Business tel: 015 2970580, Home tel: 0729248458, Fax No: 086 4037416, Cell No: 0729248458, Email: info@diagnoman.co.za

Physical Address: UNIT 7 INDUSTRIA VILLAGE 33, INDUSTRIA STREET, POLOKWANE, 0699

Multi Agents: Acc Exec

Buttons: Add Quote (1), Amend, Save, Save/Exit, Exit, Add Policy, Add Client (2), Prior Record, Next Record, **Menu**

Displays the Context menu for the Current Client

1. This is the client details page
2. Select menu on this page: it will open the client menu
3. Select option F – account enquiry
This will open the account page
4. Select option I and save the client details on your desktop with the claim documents

6. Print premium confirmation

Account summary

Client: **DIAGN001** | **DIAGNOMAN CC C/O MC BROKERS, PO BOX 307, POLOKWANE, 0699**

Branch: **MC Brokers** | Administrator: **Michelle** | Group: **Team Michelle**

Bal b/f: 0.00 Dr 11,051.05 Cr 0.00 Rec 11,051.05 3M 0.00 Bal c/f 0.00

Account enquiry

Account	Info	Contact name	Business tel (015)
DIAGN001/0001/014-D1708		Ernesto	015 2970580
REC DEBIT ORDER RUN 100277627			
DIAGN001/0001/014-D1708			
REC DEBIT ORDER RUN 100277627			

Buttons: Previous, Next, **Show all**, Menu, Exit

Account summary

Client: **DIAGN001** | **DIAGNOMAN CC C/O MC BROKERS, PO BOX 307, POLOKWANE, 0699**

Branch: **MC Brokers** | Administrator: **Michelle** | Group: **Team Michelle**

Bal b/f: 0.00 Dr 11,051.05 Cr 0.00 Rec 11,051.05 3M 0.00 Bal c/f 0.00

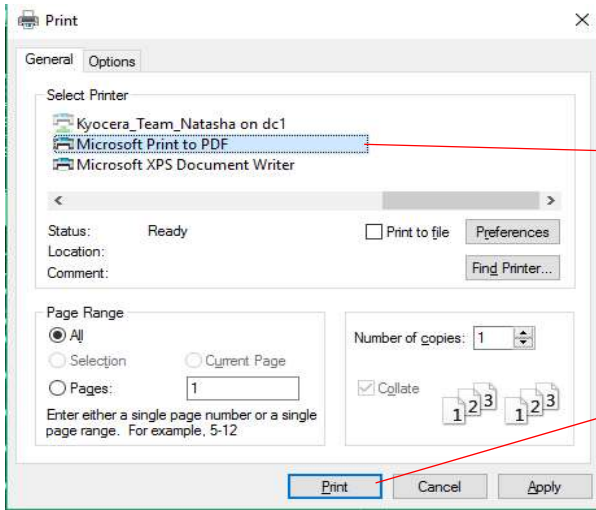
Account enquiry

Account	Info	Contact name	Business tel (015)
DIAGN001/0001/014-D1708		Ernesto	015 2970580
REC DEBIT ORDER RUN 100268377			
DIAGN001/0001/014-D1708			
REC DEBIT ORDER RUN 100268377			
DIAGN001/0001/014-D1708			
REC DEBIT ORDER RUN 100268377			
DIAGN001/0001/014-D1708			
REC DEBIT ORDER RUN 100265264			
DIAGN001/0001/012-D1705			
REC DEBIT ORDER RUN 100265264			

Buttons: Previous, Next, **Show current**, Menu, Exit

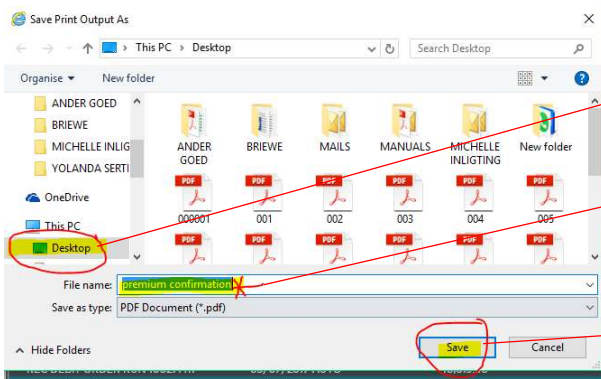
Click on the show all button to see all premiums – make sure the balance shows 0.00

Click with the mouse on the grey of the screen – do not click on anything just on the grey part and press the CTRL & P on the keyboard at the same time to print – the print screen will open



Always select the PDF printer.
Microsoft print to PDF

Select print for the document to be saved to PDF

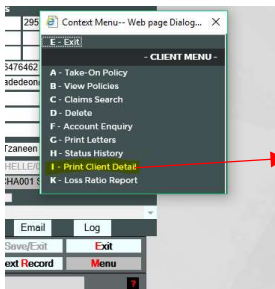


Make sure you save to the desktop or your folder that you created for the claim

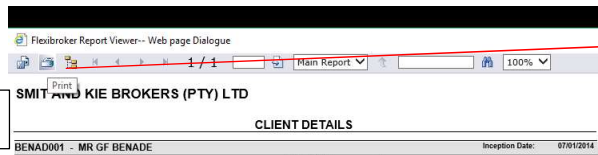
Name the document: premium confirmation

Select save for the document to be saved on the desktop

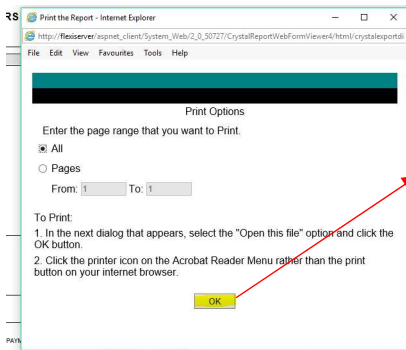
7. Print client details



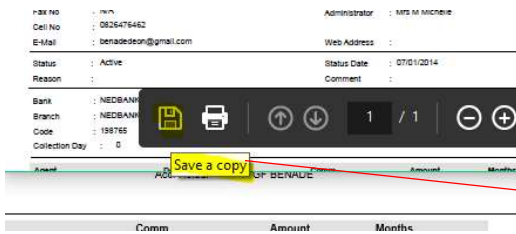
1. Select option I



2. A new page will open, select print on this page



3. After you select print the print option screen will open – select OK

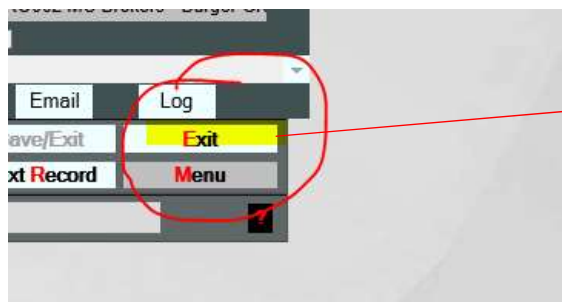


4. Select the save option to save a copy on the desktop

8. Go back to the policy screen

31/07/2017	10,819.90	0.00
03/07/2017 AUTO	-10,819.90	
30/06/2017	10,819.90	0.00
03/06/2017 AUTO	-10,819.90	
30/06/2017	614.95	0.00
03/06/2017 AUTO	-614.95	
31/05/2017	9,359.73	0.00
03/05/2017 AUTO	-9,359.73	
31/05/2017	-766.34	0.00
03/05/2017 AUTO	766.34	
31/05/2017	249.36	0.00

Press the exit button



Press the exit button

9. Checking the excess & the section you are claiming on

Policy Status: DIAGN001/0001 Client: DIAGNOMAN CC

Header: Schedule Agents Insurers Insured Special Types

Insured: DIAGNOMAN CC, Profile: Renasa MultimarkIII (Updated Nov 20...)

Policy Type: 1670 - Renasa Commercial - Monthly Policy No: RGA69450/2872

Main Insurer: Renasa Commercial - Monthly (RENMM3M)

Agent: MC Brokers - Burger Grobler Normaal Multiple Agents: Take On: R/I?:

Previous Ref: DIAGN001/0001

Payment Frequency: Monthly Paid in Advance to Broker Premium Type: Renewal Premium

Inception Date: 01/03/2015 Effective Date: 01/09/2017

Review Date: 01/03/2018 Effective/Endorsed: 31/07/2017

Details: 156581 - ADDED CANON COPIER

Section	Amount
Public Liability	10,933.64
Computer/Electronic Equipment	206.60
Motor	7,092.87
Renasa Assist - Commercial	66.00
Carnection Fee	55.00
Motor Traders	1,021.86
SASRIA	89.52
Client Service Fee	985.83
TOTAL	10,933.64

Buttons: Amend, Previous, Next, Save, Save & Exit, Exit, Add Policy, Endorse, Print, View Client, Statutory Info, Menu

Select the schedule
Click on the word schedule for it to open

Select the section you are working on. For example, motor section
click on the word motor for the section to open

look at the claim form the claimed items details

AUTO IMAGE WINDSCREENS

Jhon de Jager / Pieter du Toit
 1002, Polokwane, 0700 Church str / Kerk str 63
 (015) 291 1131/95 / 084 603 0422 Polokwane
 (015) 291 1216 0699

WINDSCREEN AUTHORISATION & CLAIM FORM

Claim Number	
Date Of Authorisation	
Claims Champion	
Claims Champion's Telephone No.	
Champion's E-Mail Address	
Insured	DIAGNOMAN
Insured's Telephone	0729248458
Broker/Agent	M C BROKERS
Policy Number	DIAGN0001
Broker Contact Person	BURGER
Broker Contact Details	0152958820
Date of Incident	29/11/2017
Description of Incident/ Cause of Damage, especially other than stone damage	STONE
Vehicle Details (Year, Make, Model)	2010, TOYOTA YARIS HAT
Vehicle Registration Number	DK43YVGP
Vin No.	JTDKG923X05124182
Glassier to Attend to Claim	AUTO IMAGE WINDSCREENS
Glassier Contact Details	015 291 1131
Replace or Repair	REPLACE
Glass Replace - Part Number	390346
Glass Replace - Special Features (i.e., Rain Sensor)	N/A
Other Parts Required - Description (i.e., Beading)	N/A

The claimed items details will be on the claim form – see windscreen claim form for example

Vehicle details will be on claim form

Make sure to check the section you are claiming on, if it is a Fridge or TV it will be most probably be contents, if it is a cell phone, check the all-risk section

make sure the item is on the policy

Header	Schedule	Agents	Insurers	Insured	Special Types
Section	Details	Sum Insured	Premium		
Public Liability	2005 VOLKSWAGEN TOURAN 1.9 TDi...	79,800	328.23		
Employers Liability	2006 BMW M3 (E46) DDN57L	193,400	771.57		
Liability - (Excess of Loss	2008 TOYOTA YARIS T1 5Dr A/C T...	60,600	280.27		
Stated Benefits	2006 AUDI A4 2.0 AVANT (B7) TB...	85,300	355.06		
Group Personal Accident	2009 OPEL CORSA UTILITY 1.4i C...	72,500	413.23		
Computer/Electronic Equipmen	2014 ISUZU NQR 500 F/C C/C CZR...	522,869	2,457.92		
Machinery Breakdown	2006 MITSUBISHI PAJERO 3200 DI...	221,700	1,089.55		
Motor	2011 LAND ROVER RANGE ROVER SP...	567,500	1,312.34		
Inception Value Policy Wordi	2015 HOME BUILT 5.0 X 2.0 TBA ...	40,000	84.70		
Motor Fleet					
Renasa Assist - Commercial	Terminated Items				
Carnection Fee	Terminated on: 26/10/2016				
Motor Clauses & Extensions	2005 CITROEN C2 1.4i VTR TBA				
Motor Traders					

If the item is on the policy go ahead and print the documents.
 If you dubbel click on the vehicle the section will open with more information on the vehicle

*When it is something that belongs under the contents section / householders you need to make sure the section is on the policy, for example – if they claim for a TV and the TV is not specified, you need to make sure they have contents/householder on the policy for the claim to be registered *

householders – contents – inhouid
 homeowners – buildings – geboue

When you print the policy schedule you need to check the excess page:

Make sure the excess on the policy is 25% min R350 – some policies have a different excess

If the excess on the policy is more – use the excess on the policy!

On flexi – before you print the schedule:

Dubbel click on the word excess page – this can be Renasa commercial excess page or domestic excess page or Xenturion excess page, the name will be different depending on the insurer

On Flexi – select the schedule page

Header	Schedule	Agents	Insurers	Insured	Special Types
Section	Details	Sum Insured	Premium		
Summary	Fire		323.28		
Policy Details	Office Contents		64.58		
Situations	Business Interruption		529.60		
Renasa Commercial Excess Str	Theft		407.80		
Policy Extensions	Money		26.48		
Fire	Goods In Transit		238.32		
Buildings Combined	Business All Risks		620.32		
Office Contents	Accidental Damage		16.81		
Business Interruption	Public Liability		336.24		
Accounts Receivable	Liability - (Excess of Loss Cover)		201.76		
Theft	Group Personal Accident		30.26		
Money	Motor		3,018.02		
Class	Renasa Assist - Commercial		33.30		
Fidelity	Electronic Equipment		81.66		
Goods In Transit	Motor Traders		1,166.67		
Business All Risks	Sasria		51.89		
Accidental Damage	Carnection Fee		55.48		
Public Liability	Client Service Fee		715.06		
Employers Liability					
Liability - (Excess of Loss					
Stated Benefits					

Dubbel click on the words excess page – you have to click 2 times with the mouse for the page to open

5 - Section Details-- Web page Dialogue

Policy **BORDE001/0001** Client **BORDER AUTO CENTRE (PTY) LTD**
 Status **Active**

Renasa Commercial Excess Structure Sum Insured: 0 Premium: 0.00 Text Only Section

Difference in conditions	R 50 000
Trustees Indemnity	R750 000
MOTOR	
PRIVATE MOTOR	
Up to R400 000	Flat excess of R2 500
R400 000 and over	5% of claim with a minimum of R2 500
Windscreen	25% of claim minimum R350
ADDITIONAL EXCESS	
Theft / Hijack	5% of gross claim (Will be waived if vehicle is fitted with a approved tracking device or gear lock)
Age 25 and under	Additional 5% of claim minimum R2 500
License less than 2 years	Additional 5% of claim minimum R1 500
License less than 1 year	Additional 5% of claim minimum R2 500
COMMERCIAL TYPE VEHCILES AND LDV'S	
LDV up to R99 999	5% of claim with a minimum of R1 500
LDV R100 000 and over	5% of claim with a minimum of R2 000
Theft	Additional 5% of gross claim (Waived when fitted with a tracking device or immobilizer)

Amend Font Next Previous Insert Remove Re-Order Exit

TEXT - ENTER to Edit, Click Insert to Add New

Move down on the page that opened until you find the section for your claim

Make sure under the section that you have the correct excess – look at the example marked with yellow.

10. Printing the policy schedule

Header	Schedule	Agents	Insurers	Insured	Special Types
Section	Details	Sum Insured	Premium		
Public Liability	2005 VOLKSWAGEN TOURAN 1.9 TDi...	79,800	328.23		
Employers Liability	2006 BMW M3 (E46) DDN57L	193,400	771.57		
Liability - (Excess of Loss)	2008 TOYOTA YARIS TI 5Dr A/C T...	60,600	280.27		
Stated Benefits	2006 AUDI A4 2.0 AVANT (B7) TB...	85,300	355.06		
Group Personal Accident	2009 OPEL CORSA UTILITY 1.4i C...	72,500	413.23		
Computer/Electronic Equipmen	2014 ISUZU NQR 500 F/C C/C CZR...	522,869	2,457.92		
Machinery Breakdown	2006 MITSUBISHI PAJERO 3200 DI...	221,700	1,089.55		
Motor	2011 LAND ROVER RANGE ROVER SP...	567,500	1,312.34		
Inception Value Policy Wordi	2015 HOME BUILT 5.0 X 2.0 TBA ...	40,000	84.70		
Motor Fleet					
Renasa Assist - Commercial					
Carnection Fee					
Motor Clauses & Extensions					
Motor Traders					
Northern Security					
Guadrisk Final Rest Cover					
ENDORSEMENT APPLICAB...					
POLICY CONDITIONS					
SASRIA					
Client Service Fee					
Terminated Items					
Terminated on: 26/10/2016					
2005 CITROEN C2 1.4i VTR TBA					

Buttons: Insert After, Delete, Replace, Combine, Amend, Previous, Next, Save, Save & Exit, Exit, Add Policy, Endorse, Print, View Client, Statutory Info, Menu

Select print on the policy screen

Print policy schedule and related documents

Print policy schedule Yes No

Print totals summary Yes No

Print endorsement summary Yes No

Print policy summary No Yes

Print statutory notice Yes No

Print statutory variation No Yes

Print premium calculations No Yes

Policy Schedule Options

Section: All sections

Print banking details

Print declaration No Yes

Report Style: Enhanced2

Totals Summary Spacing: SINGLE

Detail Spacing: DOUBLE

Suppress premiums?

Suppress motor S.I.?

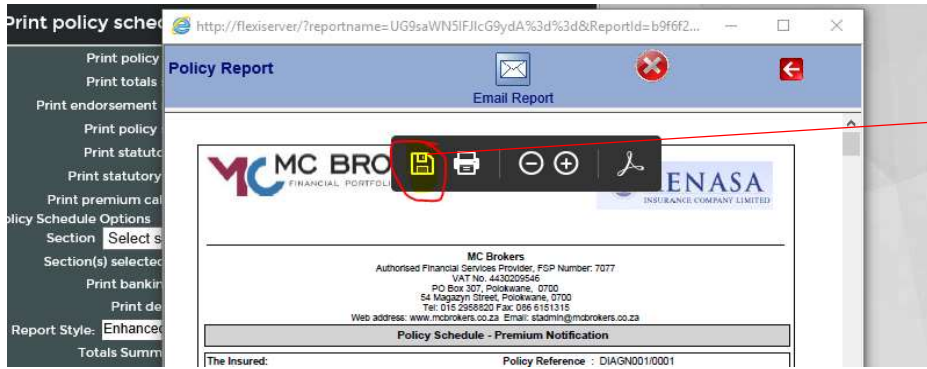
Old format? (Policy Summary and Premium Calculation only)

Buttons: View/Print, Cancel

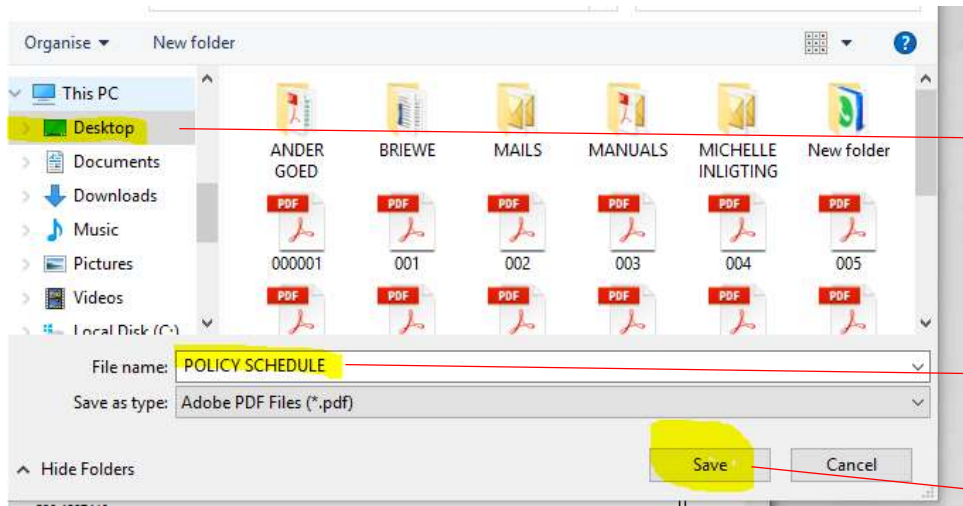
Select policy schedule option

Select view / print – you do not have to select or change the options for claims to print the schedule

policy schedule will show once you select view/print



Select 'save' to save the policy schedule on the desktop



Make sure you save to the desktop or the folder you created

File name is policy schedule

Select save for the file to save on the desktop

* exit the page back to the policy screen*



Click on the X to close the policy report

Print policy schedule and related documents

Print policy schedule Yes No
 Print totals summary Yes No
 Print endorsement summary Yes No
 Print policy summary No Yes
 Print statutory notice Yes No
 Print statutory variation No Yes
 Print premium calculations No Yes

Print before schedule?
 Print rates?
 No outstanding endorsements

Policy Schedule Options
 Section:
 Section(s) selected: Multi(1)

Print banking details
 Print declaration No Yes
 No declaration records

Report Style:
 Totals Summary Spacing:
 Detail Spacing:

Suppress premiums?
 Suppress motor S.I.?
 Old format? (Policy Summary and Premium Calculation only)

View/Print the Report (New version)

Select cancel to close this screen

10. Registering a claim

Status: Active

Section	Details	Sum Insured	Premium
Public Liability	2005 VOLKSWAGEN TOURAN 1.9 TDI...	79,800	328.23
Employers Liability	2006 BMW M3 (E46) DDN57L	193,400	771.57
Liability - (Excess of Loss)	2008 TOYOTA YARIS TI 5Dr A/C T...	60,600	280.27
Stated Benefits	2006 AUDI A4 2.0 AVANT (B7) TB...	85,300	355.06
Group Personal Accident	2009 OPEL CORSA UTILITY 1.4i C...	72,500	413.23
Computer/Electronic Equipment	2014 ISUZU NQR 500 F/C C/C CZR...	522,869	2,457.92
Machinery Breakdown	2006 MITSUBISHI PAJERO 3200 DI...	221,700	1,089.55
Motor	2011 LAND ROVER RANGE ROVER SP...	567,500	1,312.34
Inception Value Policy Wordi	2015 HOME BUILT 5.0 X 2.0 TBA ...	40,000	84.70
Motor Fleet			
Renasa Assist - Commercial			
Carnation Fee			
Motor Clauses & Extensions			
Motor Traders			
Northern Security			
Guardrisk Final Rest Cover			
ENDORSEMENT APPLICAB...			
POLICY CONDITIONS			
SASRIA			
Client Service Fee			

Terminated Items
 Terminated on: 26/10/2016
 2005 CITROEN C21.4i VTR TBA

Displays the Context menu for the Current Client

- E - Exit
- POLICY MENU -
- A - Take on policy
 - B - Take on quote
 - D - New claim**
 - F - Claims search
 - G - Allocate unallocated
 - H - Generate future details
 - I - Status - View/Change/Delete/Cancel
 - J - View transactions
 - K - Print letters
 - L - Generate new snapshot
 - M - List/View snapshots
 - N - Raise endorsement debits
 - O - Raise debit
 - Q - Copy policy
 - R - Change policy type
 - S - Replace Policy Wording
 - T - Recalculate Policy
 - U - Authorise Policy
- REPORTS -
- V - Activity Report
 - W - Loss Ratio Report
 - Y - Claim Details

1 Select menu on the policy screen

2 select option D for new claim

Loss Ref. DIAGN001/0001/0009 Client. DIAGNOMAN CC Desc.

Accounts Receivable	0	0.00	0.00
Business All Risks	0	0.00	0.00
Electronic Equipment Up To R500 000	0	0.00	0.00
Fire	0	0.00	0.00
Goods In Transit	0	0.00	0.00
Motor Traders External	0	0.00	0.00
Motor Traders Internal	0	0.00	0.00
Money	0	0.00	0.00
Motor	0	0.00	0.00
Motor Private Type Vehicles	0	0.00	0.00
Motor Trailers/Caravans	0	0.00	0.00
Non Motor	0	0.00	0.00
Public Liability	0	0.00	0.00

Item	Risk Class	Insurer	Claim	Loss	Excess
2005 VOLKSWAGEN TOURAN 1.9 TDI BPR71L	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2006 AUDI A4 2.0 AVANT (B7) TBA	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2006 BMW M3 (E46) DDN57L	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2006 MITSUBISHI PAJERO 3200 DI-D CLX A/T TBA	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2008 TOYOTA YARIS T1 5Dr A/C TBA	Motor	Renasa Commercial - Monthly	<input checked="" type="checkbox"/>	3572.00	893.00
2009 OPEL CORSA UTILITY 1.4I CLUB P/U S/C CMY593L	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2011 LAND ROVER RANGE ROVER SPORT 5.0 V8 S/C BCT0KRCP	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00
2014 ISUZU NQR 500 F/C C/C CZR897L	Motor	Renasa Commercial - Monthly	<input type="checkbox"/>	0.00	0.00

Confirm Exit

Select motor on the top part of the screen

Select the motor you need to register the claim on

Make sure you Tick the box for the vehicle you selected

1* Use the amount on the claim form that says *total incl vat* for the loss amount and add it on the column that says 'loss'

Work out the excess using your loss amount. Enter the loss amount on the calculator and times (X) by 25 % this amount is for the column that says excess

Prices Include VAT

Sub Total:	3 572.00
VAT Total:	438.96
Total (incl):	3 572.00

We use the amount that says total incl on the quotation

Loss Entry Q&A Other parties Financial Claim Items

Reported on 25/09/2018 How MAIL by MC BROKERS

Date of loss 29/11/2017 Time Area LIMPO - LIMPOPO PROV

Risk Class Motor Language English

Cause WINDS - WINDSCREEN Administrator OUTOIT/0001 Du

Client Ref Insurer Ref Insurer Contact

Service provider Assessor

Authorisation Date 25/09/2018

Short desc 2008 TOYOTA YARIS T1 5Dr A/C DK43YVGP

Long desc WINDSCREEN - STONE DAMAGE

Police Station Case No

Estimate 3572.00 Excess 893.00 Paid 0.00

Outstanding Recovered

Phone Number 015 2970580 Fax Number 086 4037416 Email info@diagnoman.co.za

Broker Branch MC Brokers Cell No 0729248458

Accounts exec

Claim Status In Force Associated claims Associated

Policy cancelled due to write-off

Diary Notes Docs SMS Email Log

Amend Previous Next Save Save/Exit Exit

Transactions Add Risk Item (4) Delete (3) Delete ALL Menu

- 1
- 2
- 3
- 4
- 5
- 6
- 7

- 1.The date we register the claim on
- 2.The task number on streamline
- 3.The broker for the client – not just broker
- 4.The date of loss/incident date on the claim form
- 5.Select from the list – lost/damaged/lightning
- 6.Item claimed details completed on the short description
- 7.Claim form description for the long description

Broker Contact Person	BURGER
Broker Contact Details	0152958820
Date of Incident	29/11/2017
Description of Incident/ Cause of Damage, especially other than stone damage	STONE
Vehicle Details (Year, Make, Model)	2010, TOYOTA YARIS HAT
Vehicle Registration Number	DK43YVGP
Vin No.	JTDKG923X05124182
Glazier to Attend to Claim	AUTO IMAGE WINDSCREENS
Glazier Contact Details	015 291 1131

Date of loss / incident date

Description of loss

the date of loss and description will be on the claim form, if this is not on the claim form you cannot register the claim

Loss Entry | Q&A | Other parties | Financial | Claim items

Reported on: 25/09/2018 | How: MAIL | By: MC BROKERS

Date of loss: 29/11/2017 | Time: | Area: LIMPO - LIMPOPO PROVIT

Risk Class: Motor | Language: English

Cause: WINDS - WINDSCREEN | Administrator: DUTOIT/0001 Du

Short desc: 2008 TOYOTA YARIS T1 5Dr A/C DK43YVGP

Long desc: WINDSCREEN - STONE DAMAGE

Estimate: 3572.00 | Excess: 893.00 | Paid: 0.00

Recovered: 0.00

Phone Number: 015 2970580 | Fax Number: 086 4037416 | Email: info@diagnoman.co.za

Broker Branch: MC Brokers | Cell No: 0729248458

Buttons: Amend, Previous, Next, Save (with red star), Save/Exit, Exit

Transactions | Add Risk Item (4) | Delete (3) | Delete ALL | Menu

Select save once all the information has been completed

Insurer Contact

VBScript: Date more than 30 days old

You have entered a loss date which is more than 30 days old
Do you wish to continue?

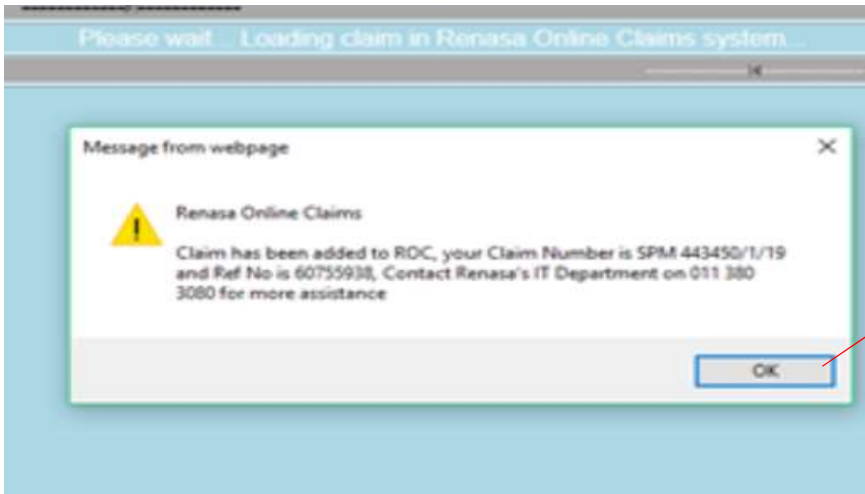
Buttons: Yes, No

Excess: 893.00 | Paid: 0.00

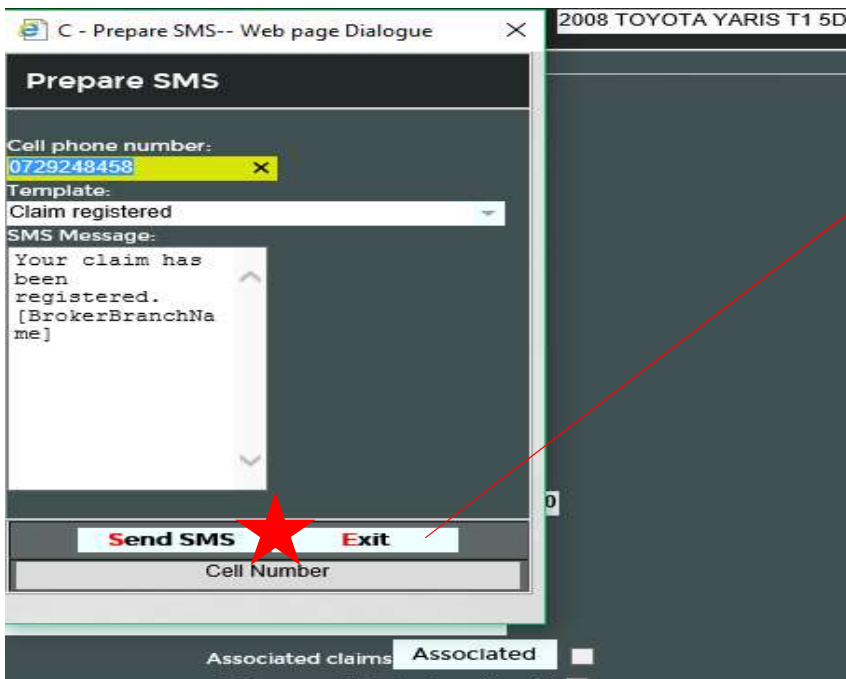
Recovered: 0.00

If you have this message about 30 days you select yes and ask the broker for late notification reason

you will not receive this message if the claim is registered within 30 days



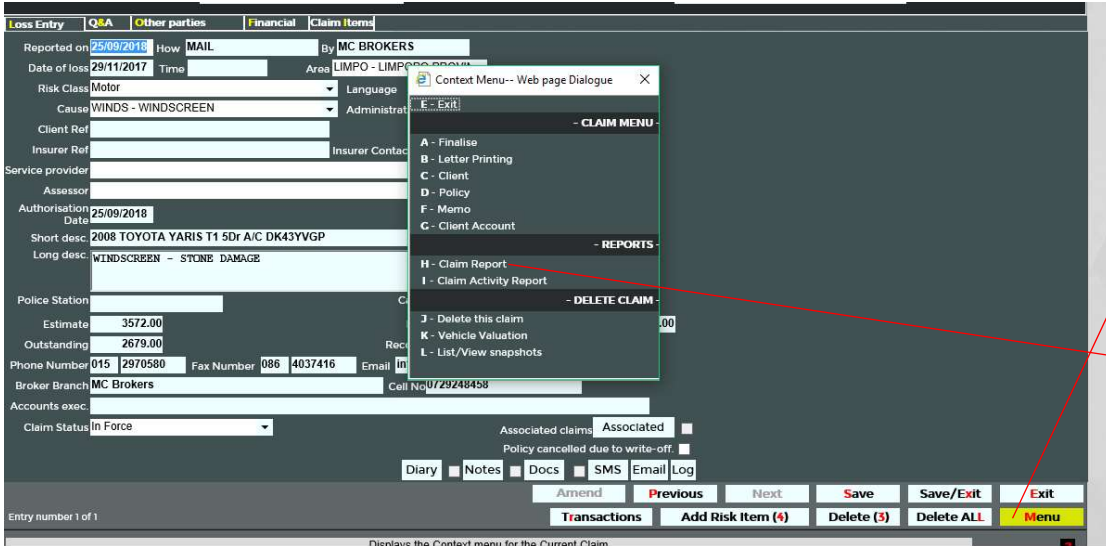
Select ok to continue.
Renesa & Xenturion claims will give this message with a claim number. Other claims will not have this messages



We do not sms from the system.
Select exit on this screen

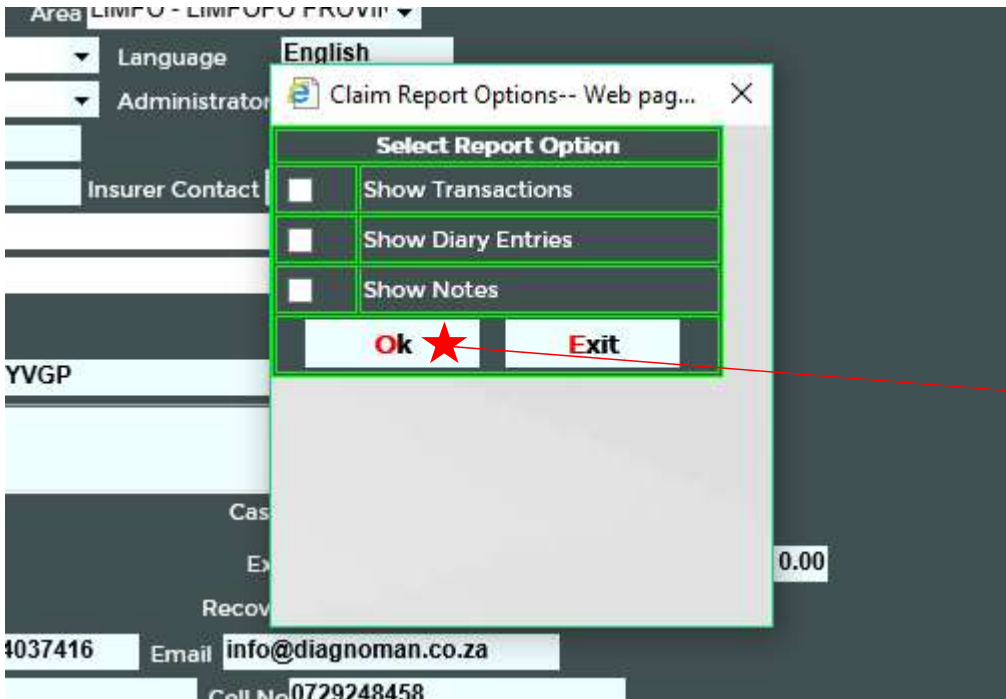
your claim is now registered and you need to print the claim record

11. Printing the claim record

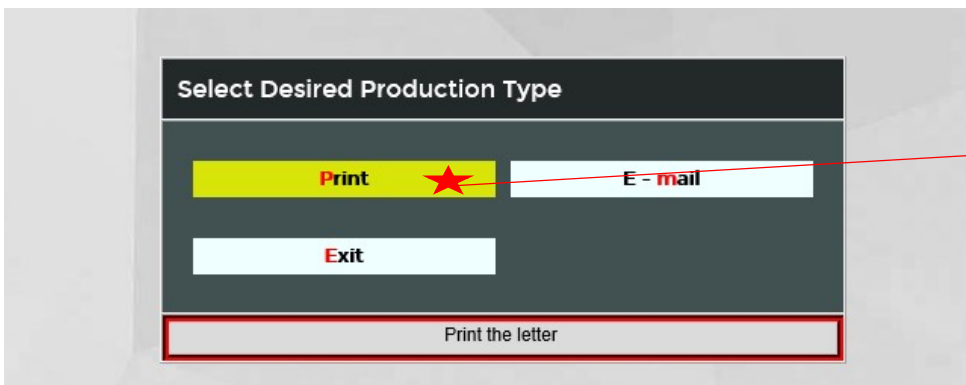


1 Select menu for the claim menu to pop up

2 select option H – claim report



Do not tick any of the boxes just select the OK button



Select print

Select the print button

Press the 'OK' button

Print Options

Enter the page range that you want to Print.

All
 Pages

From: 1 To: 1

To Print:

1. In the next dialog that appears, select the "Open this file" option and click the OK button.
2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser.

OK

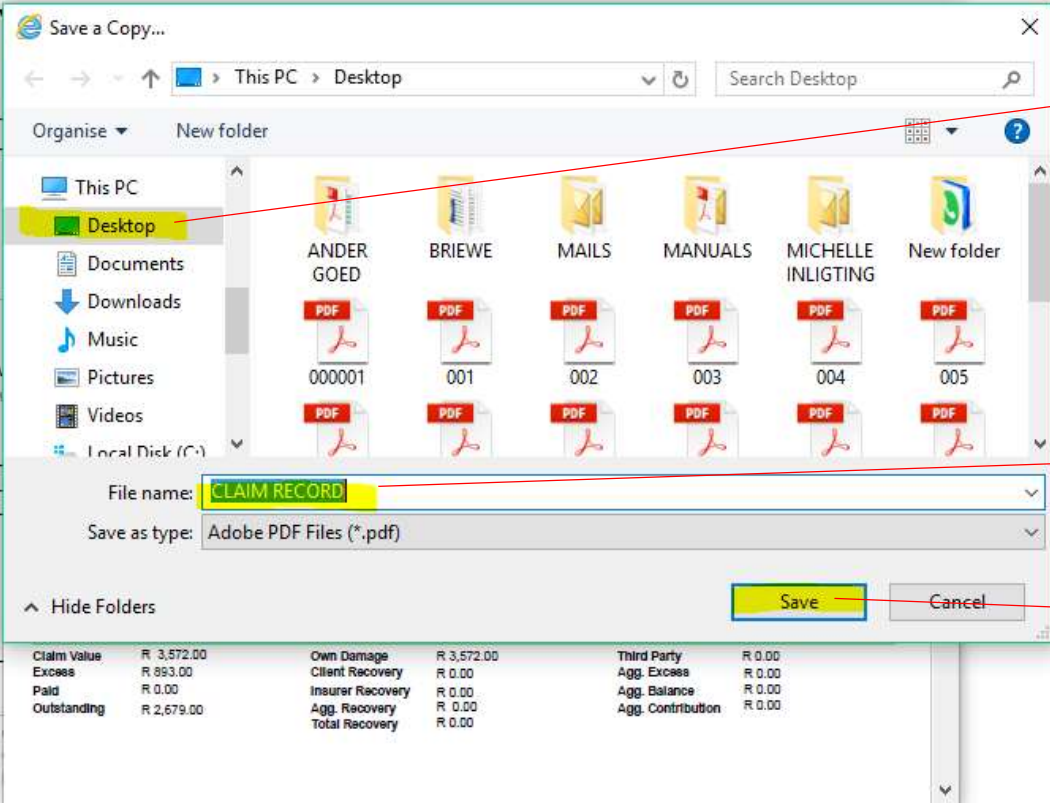
Select the save button for the claim record to be saved on the desktop/folder you created

SMIT AND KIE BROKERS (PTY) LTD

CLAIM RECORD DETAILS

Claim Ref.	DIAGN001-0009	Client	DIAGNOMAN CC	Phone	(015) 2970580
Policy No.	RGA69450/2672	Policy Ref.	DIAGN001/0001	Risk Class	Motor
Date of Loss	29/11/2017	Renewal		Contact	
Insurance Co	RENASA INSURANCE COMPANY LTD	Insurer Ref.			
Loss Details					
Reported On	25/09/2018	How	MAIL	By	MC BROKERS
Area	LIMPOPO PROVINCE	Cause	WINDSCREEN	Language	English
Details	WINDSCREEN - STONE DAMAGE			Loss	3,572.00
List of Items	2008 TOYOTA YARIS T1 5Dr A/C TBA			Excess	893.00
Administrator	Mrs Yolanda Du Toit	Assessor		Client's Own Ref.	
Police Station		Case No			
QUESTIONS AND ANSWERS					
Claim Question	Answer				
Drivers Age					
Drivers Id					
Drivers Name					
Motor/Vin No					
Vehicles Reg No					
Voluntary Excess					
Status	In Force				
Financials					
Claim Value	R 3,572.00	Own Damage	R 3,572.00	Third Party	R 0.00
Excess	R 893.00	Client Recovery	R 0.00	Agg. Excess	R 0.00
Paid	R 0.00	Insurer Recovery	R 0.00	Agg. Balance	R 0.00
Outstanding	R 2,679.00				

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3 T1 5D



Make sure you select desktop or your folder you created to save the document

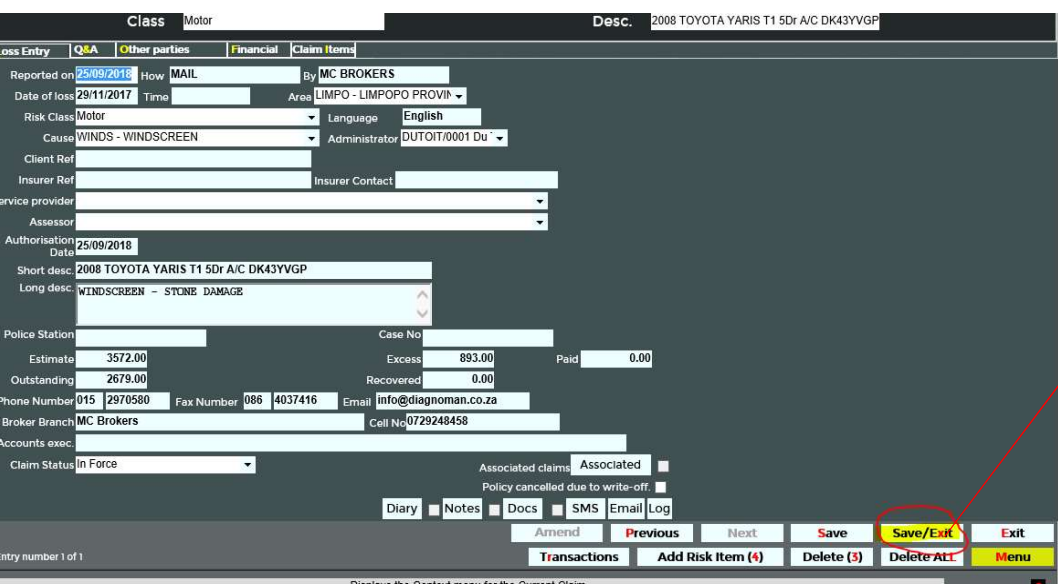
File name is claim

Select the save button to save the document

1 / 1 Main Report 100%



Close the page on the X

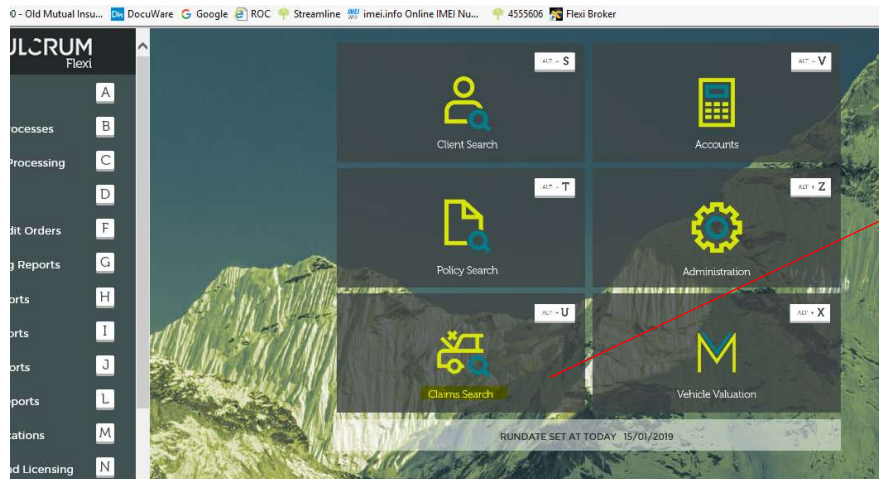


Select save/exit.
You are now done with the claim on Flexi

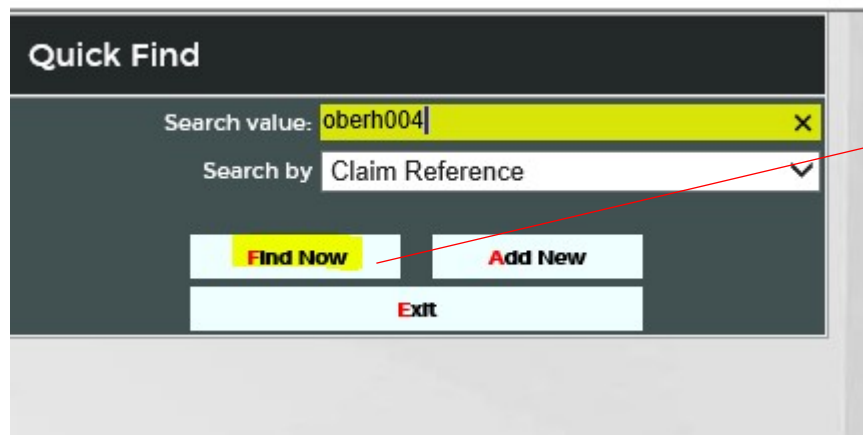
Finalizing a claim on Flexi

If the payment has not pulled through from ROC

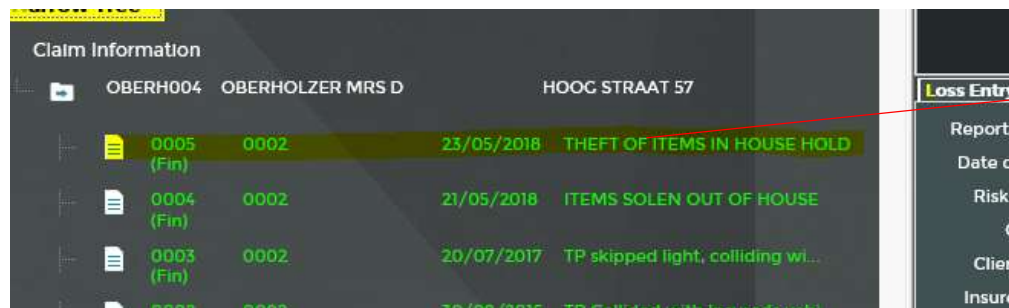
1. Search your claim on Flexi



Select claim search



Type in the claim reference you need to search and select find



Click on the claim you need to work on

Class: **Householders** Desc: **THEFT OF ITEMS IN HOUSE HOLD**

Reported on: 31/05/2018 How: **MAILS** By: **SALVUS**

Date of loss: 23/05/2018 Time: 16:30 Area: []

Risk Class: **Householders** Language: **English**

Cause: **THEFT - THEFT** Administrator: **NATASHABLOEM**

Client Ref: **45150525** Finalised: 22/06/2018

Insurer Ref: **SPM 400006/5/18** Insurer Contact: []

Policy provider: []

Assessor: []

Authorisation: []

Short desc: **THEFT OF ITEMS IN HOUSE HOLD**

Long desc: **THIEFS BROKE INTO HOUSE AND STOLE ITEMS EXCESS - R1000**

Office Station: **POLOKWANE** Case No: **CAS 645/2018**

Estimate: 3799.00 Excess: 1000.00 Paid: 8716.00

Outstanding: 0.00 Recovered: 0.00

Phone Number: 015 299 8800 Fax Number: [] Email: **parts4@vwpolokwane.co.za**

Maker Branch: **Cum Laude** Cell No: **0721161286**

Accounts exec: []

Claim Status: **Finalised** Associated claims: **Associated**

Policy cancelled due to write-off: []

Diary [] Notes [] Docs [] SMS [] Email [] Log []

Amend Previous Next Sa

Page number 1 of 1

Select amend to work on the claim

Class: **Householders** Desc: **THEFT OF ITEMS IN HOUSE HOLD**

Reported on: 31/05/2018 How: **MAILS** By: **SALVUS**

Date of loss: 23/05/2018 Time: 16:30 Area: []

Risk Class: **Householders** Language: **English**

Cause: **THEFT - THEFT** Administrator: **NATASHABLOEM**

Client Ref: **45150525** Finalised: 22/06/2018

Insurer Ref: **SPM 400006/5/18** Insurer Contact: []

Policy provider: []

Assessor: []

Authorisation: []

Short desc: **THEFT OF ITEMS IN HOUSE HOLD**

Long desc: **THIEFS BROKE INTO HOUSE AND STOLE ITEMS EXCESS - R1000**

Office Station: **POLOKWANE** Case No: **CAS 645/2018**

Estimate: 3799.00 Excess: 1000.00 Paid: 8716.00

Outstanding: 0.00 Recovered: 0.00

Phone Number: 015 299 8800 Fax Number: [] Email: **parts4@vwpolokwane.co.za**

Maker Branch: **Cum Laude** Cell No: **0721161286**

Accounts exec: []

Claim Status: **Finalised** Associated claims: **Associated**

Policy cancelled due to write-off: []

Diary [] Notes [] Docs [] SMS [] Email [] Log []

Amend Previous Next Sa

Page number 1 of 1

Click on the transaction button to open the screen for the payments

Claim: **OBERH004-0005** Insured: **OBERHOLZER MRS D**

Insurer: **RENASA INSURANCE COMPANY** Policy No: **RGT 41134/5305**

Risk Class Group: **Householders** Short Desc.: **THEFT OF ITEMS IN HOUSE HOLD**

Finalised Date: **22/06/2018**

Recovery: 0.00 Payments: 8716.00 Total: 8716.00

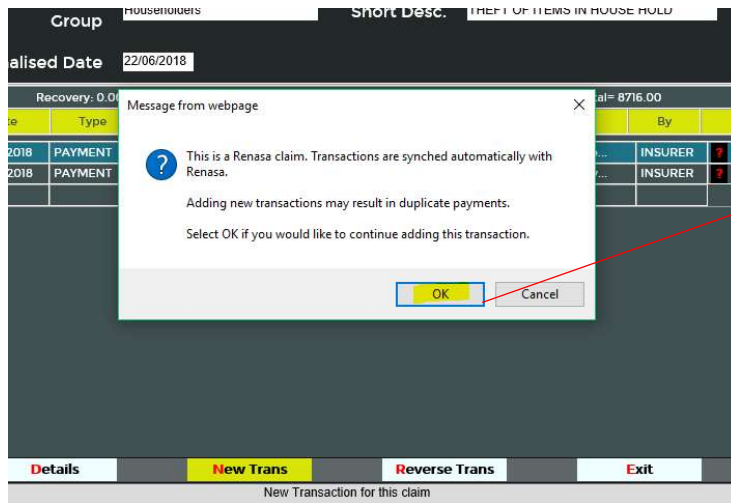
Date	Type	Chq NO	Value	Payee	Reason	By	
2/06/2018	PAYMENT	SPM400006	5496.00	MRS D OBERHOLZER	Manual Payment Insure...	INSURER	?
0/07/2018	PAYMENT	OLA21515	3220.00	Oxford Loss Adjusters...	Automatic Payment Inv...	INSURER	?

Details **New Trans** **Reverse Trans** **Exit**

Loaded

Select new Trans to load the payment manually

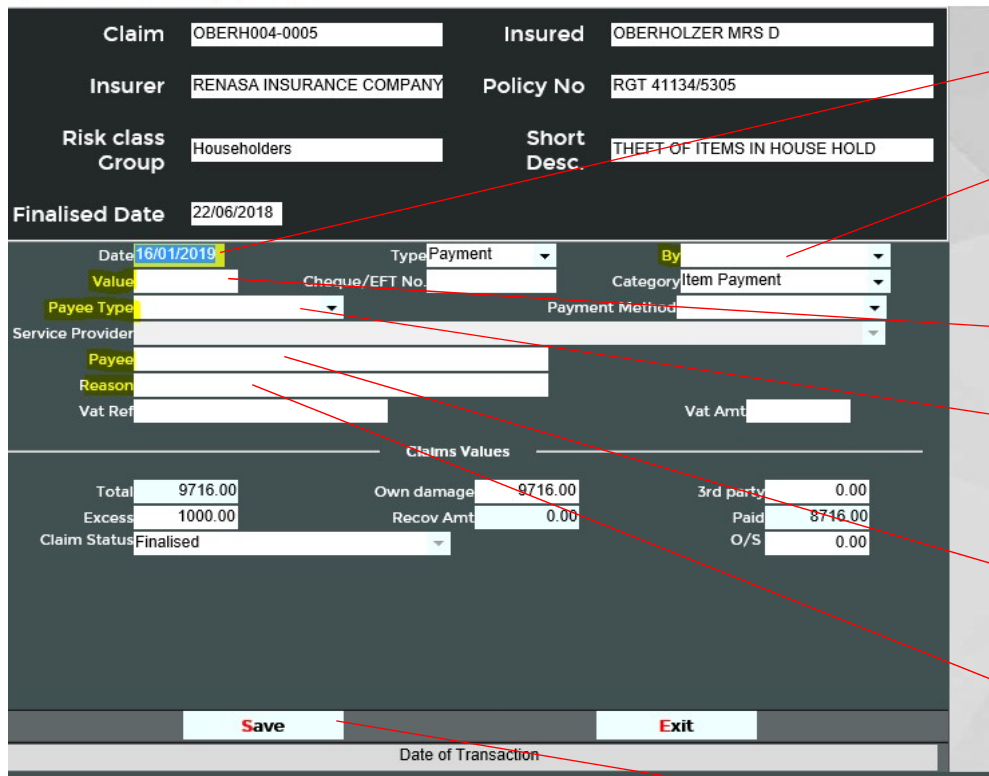
Renasa & Xenturion claims will give you this message



If the payment did not pull through from ROC you can click OK to load the payment manually

Make sure you use the correct amount when loading the payment

Claim transactions-- webpage dialogue



Date payment was made

Dropdown gives you option for Insurer, Broker, other. Normally the insurer does the payment

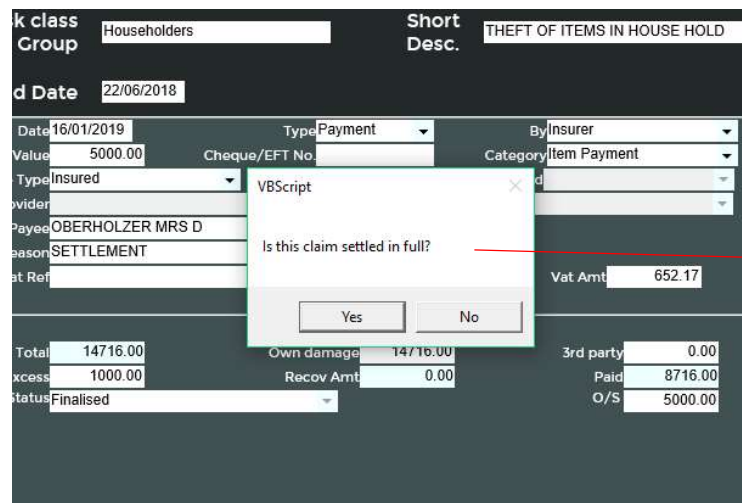
The amount that was paid after excess was deducted

Option to pay insured, service provider, Third party or other. Select the option you paid

Payee – the name of the person that was paid

Short reason for payment – settlement to insured / TP or BP invoice paid

Click on the save button



If this is the only payment that needs to be loaded and the claim can be finalised you select YES, if you have more payments to load – select NO and load the other payments.

If you have all the payments loaded for the claim you can select Yes and the next screen will open

Date: 22/06/2018

Date: 16/01/2019 Type: Payment By: Insurer

Value: 5000.00 Cheque/EFT No: Category: Item Payment

Type: Insured VBScript

Provider: OBERHOLZER MRS D

Reason: SETTLEMENT

Vat Amt: 652.17

Total: 14716.00 Own damage: 14716.00 3rd party: 0.00

Excess: 1000.00 Recov Amt: 0.00 Paid: 8716.00

Status: Finalised O/S: 5000.00

If all the payments has been loaded you can select Yes for the claim to be finalised on Flexi

If you select No, it will not finalise the claim automatically

F - Prepare SMS-- Web page Dialogue

Prepare SMS

Cell phone number: 0721161286

Template: Claim paid

SMS Message: Your claim has been settled. Payment will be made within 7 days. [BrokerBranchName]

Send SMS Exit

Cell Number

Exit – we do not send SMS from Flexi system

Type: Payment By: Insurer

Cheque/EFT No: Category: Item Payment

MRS D

VBScript

Do you wish to update financial values?

Yes No

Vat Amt: 652.17

Own damage: 14716.00 3rd party: 0.00

Recov Amt: 0.00 Paid: 13716.00

O/S: 0.00

If the estimate of the claim was not updated before the payment was loaded you can say Yes to update it, if you updated the estimate before loading the payment and all amounts agree with the payments made you can select NO to finalise claim.

All the payments made including your excess must add up to your estimate.

Finalise Claim-- Web page Dialogue

Date 16/01/2019
Status SETTLED

Outstanding Diary Entries

Diary Details	Due Date	Da Comp
There are no outstanding diary entries		

Save Exit

Loaded

Click save for the claim to finalise

31/05/2018 How MAILS By SALVUS
23/05/2018 Time 16:30 Area
Householders Language English
Use THEFT - THEFT Administrator NATASHABLOEM
Ref 45150525 Finalised 16/01/2019
Ref SPM 400006/5/18 Insurer Contact
Description THEFT OF ITEMS IN HOUSE HOLD
THIEFS BRCKE INTO HOUSE AND STOLE ITEMS EXCESS - R1000
Location POLOKWANE Case No CAS 645/2018
Amount 9716.00 Excess 1000.00 Paid 8716.00
Recovered 0.00
Phone 015 299 8800 Fax Number Email parts4@vwpolokwane.co.za
Cum Laude Cell No 0721161286
Status SETTLED
Associated claims Associated
Policy cancelled due to write-off.
Diary Notes Docs SMS Email Log
Amend Previous

Claim will show finalised

The estimate needs to be the total of the claim paid including your excess, if the estimate is more or less than your claim payments, you need to update the estimates. The amounts paid by the insurers needs to be the same on Flexi – you need to make sure this is update because it does have an effect on the Loss ratio for the client

Follow step 11 to print the claim record again for proof that the Flexi claim was updated and finalised, this will be attached on the system