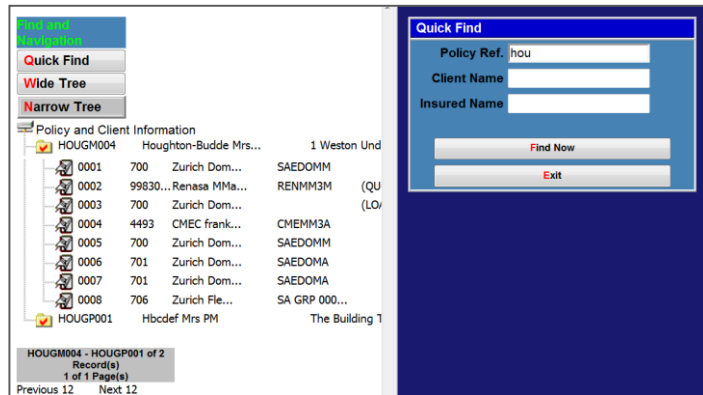


Loading a New Claim

Claim Search
Alt-U

Add New

- Search for relevant policy – **ONLY ACTIVE POLICIES**



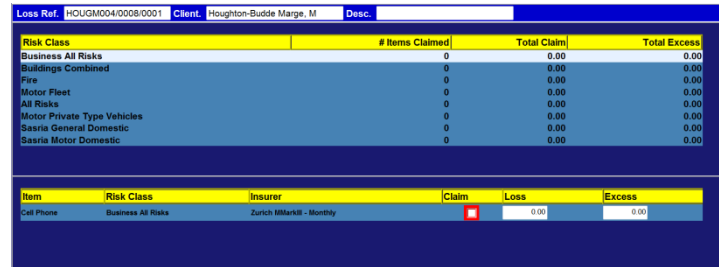
New Claim

Or

- Search for relevant policy - **ONLY ACTIVE POLICIES**
- Policy Context menu – **D** – **New Claim**

Accounts Check

- New Claims Entry Screen – Risk Class / Item Section
- Click on Risk Class to View Items loaded



Risk Class	# Items Claimed	Total Claim	Total Excess
Business All Risks	0	0.00	0.00
Buildings Combined	0	0.00	0.00
Fire	0	0.00	0.00
Motor Fleet	0	0.00	0.00
All Risks	0	0.00	0.00
Motor Private Type Vehicles	0	0.00	0.00
Sasria General Domestic	0	0.00	0.00
Sasria Motor Domestic	0	0.00	0.00

Item	Risk Class	Insurer	Claim	Loss	Excess
Cell Phone	Business All Risks	Zurich MMarkII - Monthly	■	0.00	0.00

Message from webpage

? This client has outstanding balances
Do you wish to continue?

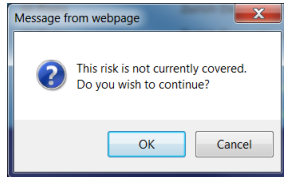
- Find & Tick the risk item
- Flexi inserts the Full Amount insured – adjust as required
- Insert Excess
- Select additional risk item if required – additional Claim reference registered per Section, risk loss values totaled, except Motor Vehicles – each vehicle on separate claim.
- Terminated items displayed in yellow at the bottom

Item	Risk Class	Insurer	Claim	Loss	Excess
Cell Phones & Pagers (Excess R500)	All Risks	Zurich Domestic - Annual	■	0.00	0.00
Laptop & Personal Computers	All Risks	Zurich Domestic - Annual	■	0.00	0.00
Unspecified Items	All Risks	Zurich Domestic - Annual	■	0.00	0.00
ARISKS - FIREARMS AND AMMUNITION	All Risks	Zurich Domestic - Annual	■	0.00	0.00
On One Car CD Tuner	All Risks	Zurich Domestic - Annual	■	0.00	0.00

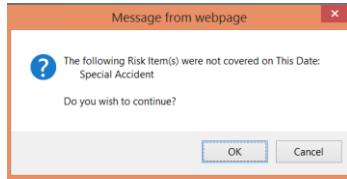
- Click **CONFIRM**

Note: Warnings messages

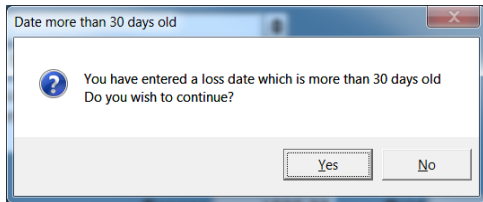
- Item Not Currently Covered



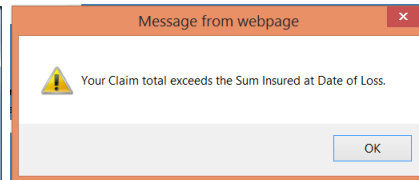
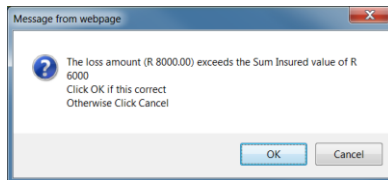
- Item Not Covered at The Date of Loss – **Security Access Rights**



- Claim More than 30 days old



- Where loss exceeds the Sum Insured



Claims Loss Entry Screen

Automatic Diary Entries

- Main Menu – **O** Maintenance, **M** Diary Code Maintenance
- Select / Add Dairy code – tick **Default for New**
- Choose Default letter if required

- Setup Diary Codes e.g. Phone Client regarding proposal form
- Move Diary when Staff on leave M

Main Menu – M Communications, C Diary Transfer

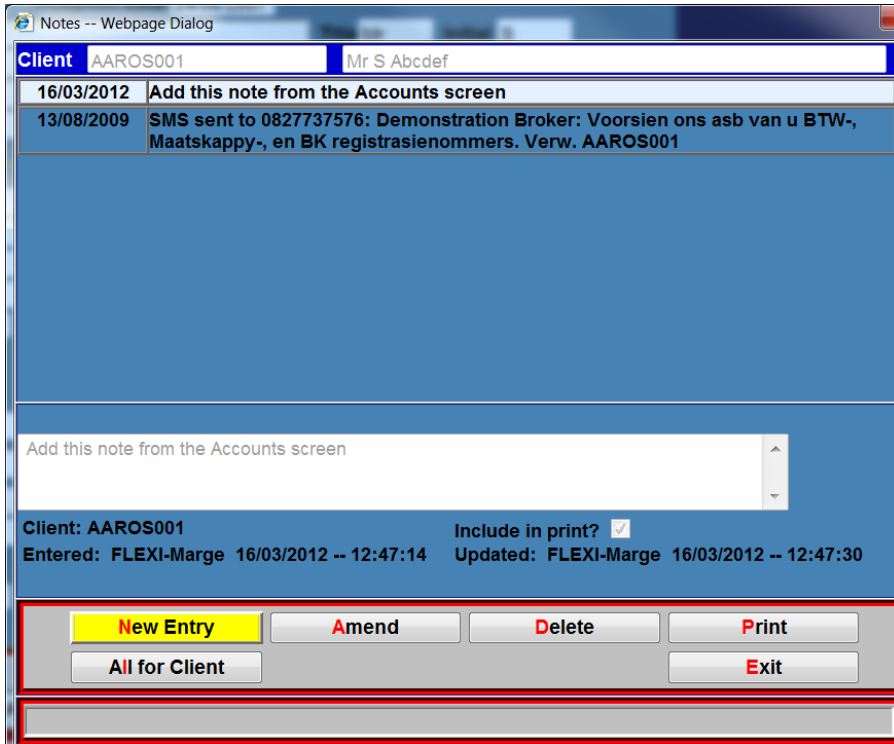
Automatic SMS's

SMS Tasks				
Name	Description	Send SMS	Show Preview	
Manual	SMS to be initiated manually by user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manual Bulk	Bulk SMS to be initiated manually by user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New claim	SMS to be initiated when new claim is saved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim paid	SMS to be initiated when claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim paid SP	SMS to be initiated when service provider claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim paid TP	SMS to be initiated when third party claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Claim paid OTH	SMS to be initiated when Other claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client birthday	SMS to be initiated on client's birthday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New/Activated Policy	SMS to be initiated when a new Policy is made, or when an existing Policy is Activated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change of Claim Status	SMS to be initiated when the status of a Claim is changed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banking DD And Reversals	SMS to be initiated when an RD or reversal is done on a client Bank Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- **Main Menu – M Communications, O SMS Tasks**
- Click Send SMS & Show Preview if required
- **NEW** – Change of Claim Status
- **Newish** – Claims paid – Insured / Service Provider / Third Party / Other
- Templates - **M** Communications, **P** SMS Templates

Communications

Notes



Notes -- Webpage Dialog

Client: AAROS001 Mr S Abcdef

Date	Note
16/03/2012	Add this note from the Accounts screen
13/08/2009	SMS sent to 0827737576; Demonstration Broker: Voorsien ons asb van u BTW-, Maatskappy-, en BK registrasienommers. Verw. AAROS001

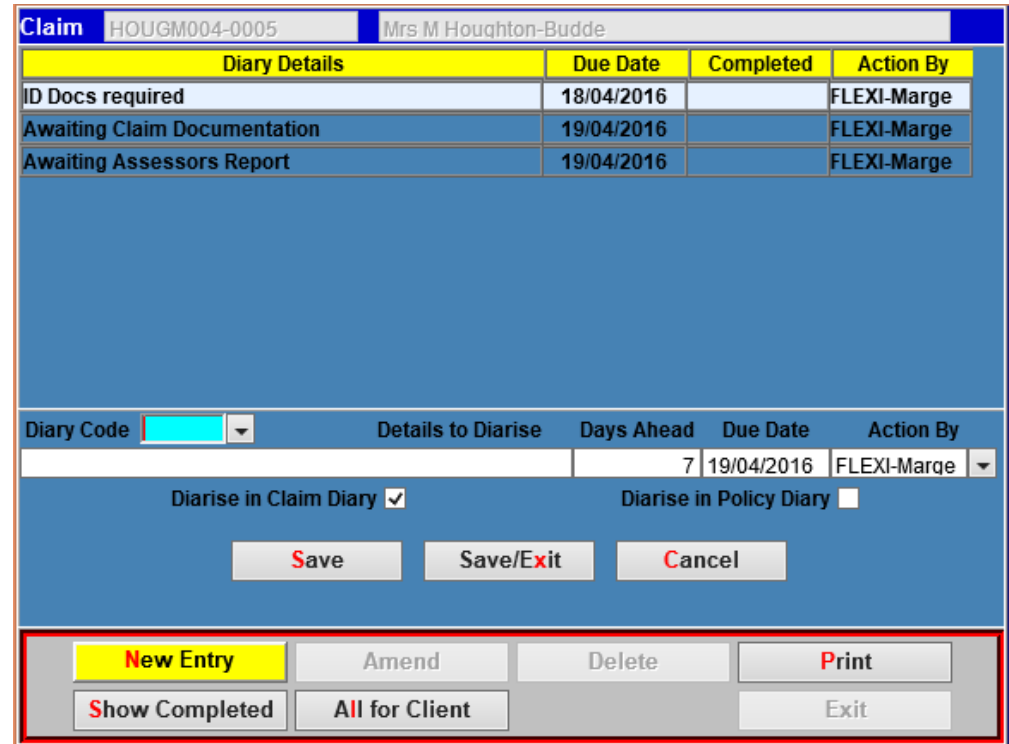
Add this note from the Accounts screen

Client: AAROS001 Include in print?
 Entered: FLEXI-Marge 16/03/2012 -- 12:47:14 Updated: FLEXI-Marge 16/03/2012 -- 12:47:30

New Entry Amend Delete Print
 All for Client Exit

- Defaults Notes, SMS sent, Letters printed, E-mails sent
- Security / Access Rights

Diary



Claim HOUGM004-0005 Mrs M Houghton-Budde

Diary Details	Due Date	Completed	Action By
ID Docs required	18/04/2016		FLEXI-Marge
Awaiting Claim Documentation	19/04/2016		FLEXI-Marge
Awaiting Assessors Report	19/04/2016		FLEXI-Marge

Diary Code [dropdown] Details to Diarise Days Ahead Due Date Action By

[dropdown] 7 19/04/2016 FLEXI-Marge [dropdown]

Diarise in Claim Diary Diarise in Policy Diary

Save Save/Exit Cancel

New Entry Amend Delete Print
 Show Completed All for Client Exit

- System Startup Diary – Broker Setup
- **Newish** – **Double Click to open that Diary entry**
- Action By – send on to another user

Docs

Client:

Claim Documents

Policy #	Claim #	Title	Comment	Date Created	File Status
HOUGM004/0008	0001	Confirmation of ID docs letter to Mrs Fritz	ID Docs of Mrs Fritz	21/03/2012 -- 11:33:52	ACTIVE

General Documents

Title	Comment	Date Created	File Status
FAIS NEEDS ANALYSIS	Mandatory for all New Clients	15/03/2012 -- 19:52:39	ACTIVE
Task Sheet	Basic Task Sheet	05/03/2012 -- 15:03:20	ACTIVE
Complete Broker Details		05/03/2012 -- 12:07:01	ACTIVE

- Adding Documents
- General Documents – Security Access Rights
- Editing Comments

Letters

Enter desired letter parameters

Select an Existing Letter Create a New Letter

Letter code:

Description:

Letter Type:

Letter output:

Language:

Special Fields:

Broker logo at top left of page

Start printing letter at line

Footer at bottom of page

Broker detail at top right of page

Left margin

Letter date

Font: [Font] Size: [Size] [Color] [Background Color]

Dear [Addressee]

[ClaimRef]

With reference to the abovementioned claim I confirm having received a cheque in the amount of [ClaimPayment] from your insurers, in full and final settlement.


This amount has been deposited into your bank account, and I enclose a copy of the deposit slip for your information.

Kindly acknowledge receipt of this payment.

Kind Regards,

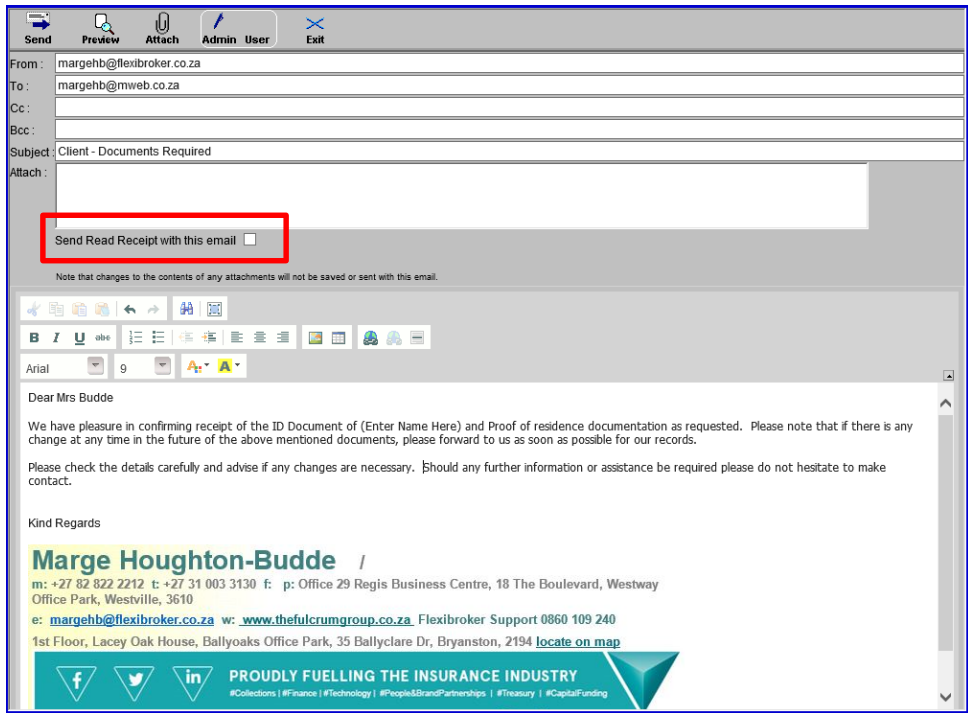
Formatting Tools



The following tools are available on the Toolbars for formatting

																								
		1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23																						
1	Cut	6	Redo	11	Strike Through	16	Left Aligned	21	Font Size															
2	Copy	7	Select All	12	Insert / Remove Numbered List	17	Centred	22	Text Colour															
3	Paste	8	Bold	13	Insert / Remove Bulleted List	18	Right Aligned	23	Background Colour															
4	Paste as Plain text	9	Italic	14	Decrease Indent	19	Image																	
5	Undo	10	Underline	15	Increase Indent	20	Font Name																	

- Letters stored under **DOCS** button

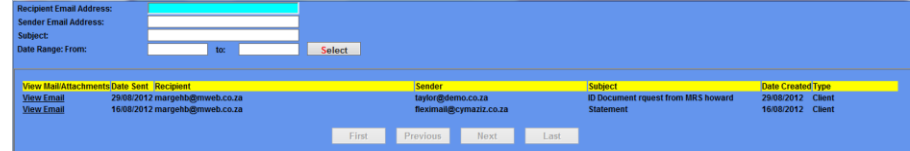
E-mails



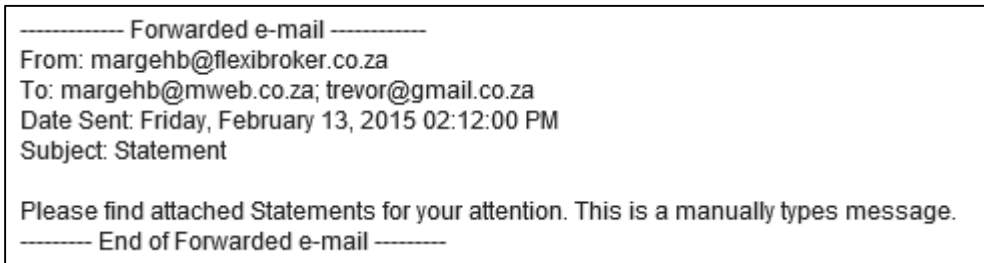
- Flexi Uniformity – Standard letters/templates for communication
- **Attach** - Attaching Docs 
- Formatting Tools – same as above
- **NEWish** - E-mail banners – Maintenance – Administrator 
- **NEWish - Bulk Emailing** – Communications – Letter printing – add attachments from General documents to emails
- **NEW** – Send read Receipt with this email- check outlook for receipt

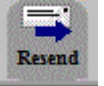
Viewing E-mails

- Email **LOG** or Flexibroker Main Menu
M - Communications Menu, L – Email Log



- Search
- Click on View Email
- **NEWish** – **Forward** message as required – now 

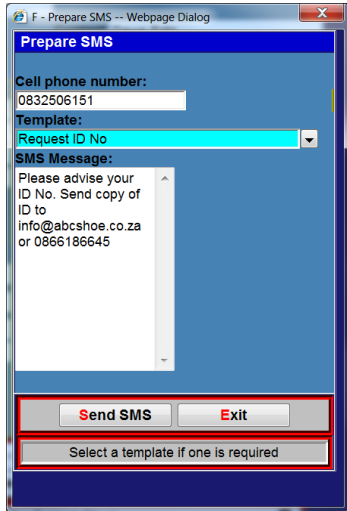


- presents with a Forward email header 
- **NEW** – **Resend** – to simply resend the message using the prior email details
- **NEW** – **EXTRACT** – prepares an XL document containing all the column see on the LOG screen – for detailed searches etc.



- Add FB or Twitter URL's with

SMS's - www.smsportal.co.za

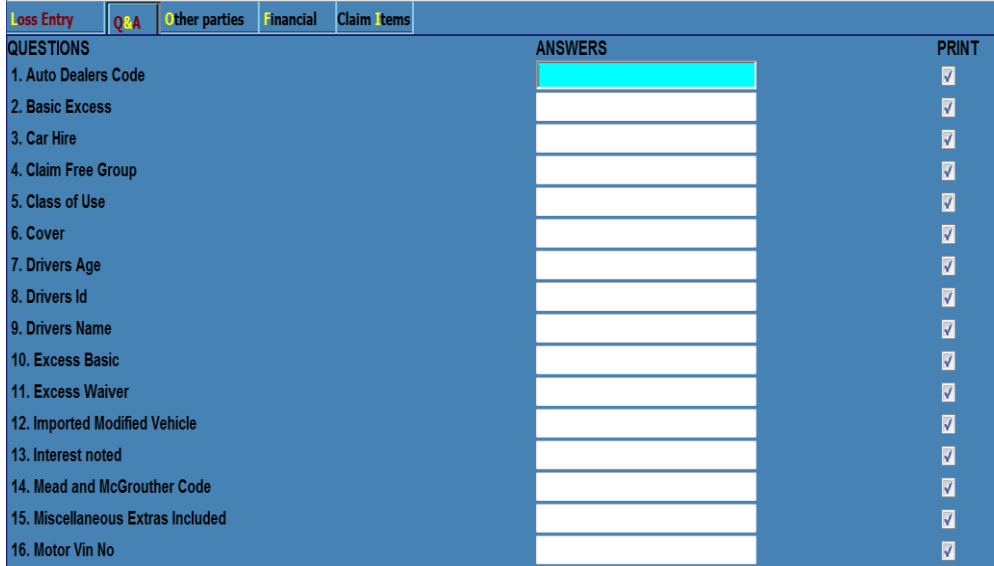


- Formatting & Management – Main Menu
- **M** – Communication
- **P** - Templates
- **O** - SMS Tasks / Default SMS's – Birthday message to clients – **see below**
- **R** - Bulk SMS's
- **S** – SMS log report – **must** be checked daily to follow up on SMS replies
- **NEWisg** – Username, Date and time added to SMS message

SMS Tasks – Menu H – P - **NEW**

SMS Tasks			
Name	Description	Send SMS	Show Preview
Manual	SMS to be initiated manually by user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manual Bulk	Bulk SMS to be initiated manually by user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New claim	SMS to be initiated when new claim is saved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim paid	SMS to be initiated when claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim paid SP	SMS to be initiated when service provider claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim paid TP	SMS to be initiated when third party claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claim paid OTH	SMS to be initiated when Other claim payment is entered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client birthday	SMS to be initiated on client's birthday	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New/Activated Policy	SMS to be initiated when a new Policy is made, or when an existing Policy is Activated	<input type="checkbox"/>	<input type="checkbox"/>
Change of Claim Status	SMS to be initiated when the status of a Claim is changed	<input type="checkbox"/>	<input type="checkbox"/>
Banking DD And Reversals	SMS to be initiated when an RD or reversal is done on a client Bank Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Q&A Screen



QUESTIONS	ANSWERS	PRINT
1. Auto Dealers Code		✓
2. Basic Excess		✓
3. Car Hire		✓
4. Claim Free Group		✓
5. Class of Use		✓
6. Cover		✓
7. Drivers Age		✓
8. Drivers Id		✓
9. Drivers Name		✓
10. Excess Basic		✓
11. Excess Waiver		✓
12. Imported Modified Vehicle		✓
13. Interest noted		✓
14. Mead and McGrouther Code		✓
15. Miscellaneous Extras Included		✓
16. Motor Vin No		✓

- Answers can be defaulted from the Policy Q&A – speak to your SuperUser or Flexi Consultant

Other parties



DETAILS

Name

Telephone

Insurer

Policy No

Reg. No

Address

Notes

PROPERTY DAMAGES

Name

Telephone

Insurer

Policy No

Address

Notes

WITNESS DETAILS

Name Address

Telephone

Entry number 1 of 2

<input type="button" value="Amend"/>	<input type="button" value="Previous"/>	<input type="button" value="Next"/>	<input type="button" value="Save"/>	<input type="button" value="Save/Exit"/>	<input type="button" value="Exit"/>
<input type="button" value="Transactions"/>	<input type="button" value="Add Risk Item (4)"/>		<input type="button" value="Delete (3)"/>	<input type="button" value="Delete ALL"/>	<input type="button" value="Menu"/>

- Third Party Details - Claim search on 3rd party name & registration fields
- Property Damage Details
- Witness Details

Financial

Claim	HOUGM004-0001	Policy	0008
Insurance Co	Zurich Insurance Company South Africa	Insured	Houghton-Budde Mrs M
Class	Motor	Pol No	SA GRP 0000000
		Pol Type	Zurich FlexiFligh
		Desc.	S&G - Front windows broken & cell phone stol

CLAIM VALUES

Estimate	15000.00				
Total	15000.00	Own damage	15000.00	3rd party	0.00
Excess	1500.00	Paid	0.00	O/S	13500.00

RECOVERY VALUES

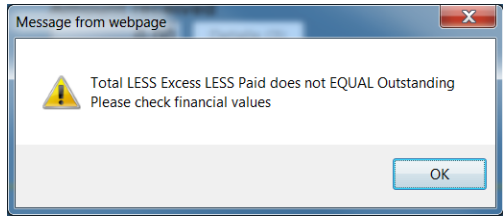
Amount due	Amount received		Amount outstanding		
Total	2500.00	0.00	2500.00		
Insurer	1500.00	0.00	1500.00		
Client	1000.00	0.00	1000.00		

Entry number 1 of 2

Amend	Previous	Next	Save	Save/Exit	Exit
Transactions	Add Risk Item (4)	Delete (3)	Delete ALL	Menu	

Own Damage

- Top section increase cost of claims – bottom section decreases
- Enter Recovery Values if required & Add 3rd Party damage here
- Where figures do not balance – Flexi posts a Warning



- Flexi will auto correct balance as per the following formula
TOTAL LESS EXCESS LESS PAID - OUTSTANDING

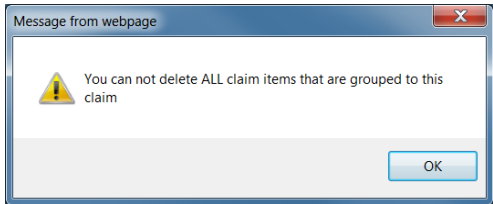
Claim Items

Claim	HOUGM004-0005	Policy	0007
Insurance Co	Zurich Insurance Company South Africa	Insured	Budde Enterprises
Class	Home owners	Pol No	
		Pol Type	Zurich Domesti
		Desc.	House Robbery & All Risks Claim

CLAIM ITEMS

Item	Loss	Excess	Remove
55 Ravenstone Mews, Clifton Hills Estate, 51 Acutts Drive, Everton, 3610	35000.00	1000.00	■
Total Sum Insured at Date of Loss	2000000.00		

- To update values of estimates originally entered
- To remove items originally linked to the claim – when multiple items have been entered
- NEW** – Flexi now reflects the 'Total Sum Insured at date of loss'
- Warning:



Claim Search

Multiple search fields

Quick Find	
Claim Ref.	<input type="text"/>
Insurer Ref.	<input type="text"/>
Vehicle Registration	<input type="text"/>
Client Ref.	<input type="text"/>
Client Name	<input type="text"/>
Insured Name	<input type="text"/>
3rd Party Name	<input type="text"/>
3rd Party Registration	<input type="text"/>
Insurer Policy Number	<input type="text"/>
Driver's ID Number	<input type="text"/>
Driver's Name	<input type="text"/>
Date of Loss	<input type="text"/>
Date Reported	<input type="text"/>
<input type="button" value="Find Now"/> <input type="button" value="Add New"/>	
<input type="button" value="Exit"/>	

Claims Menu Bar

<input type="button" value="Amend"/>	<input type="button" value="Previous"/>	<input type="button" value="Next"/>	<input type="button" value="Save"/>	<input type="button" value="Save/Exit"/>	<input type="button" value="Exit"/>
<input type="button" value="Transactions"/>			<input type="button" value="Add Risk Item (4)"/>		<input type="button" value="Menu"/>

- **Add Risk Item (4)** – link additional Risk items to claim
- New Risk class - new claim
- **Entry number 1 of 2** - Indicator bottom of screen
- Use **Next & Previous** buttons to access these claims or the Tree view to the Left
- Transaction – see below

Transactions

- New Transaction

Date	21/03/2012	Type	Payment	By	Insurer
Value	4500.00	Cheque/EFT No	eft 25/03/12	Category	Item Payment
Payee Type	Insured	Payment Method			
Service Provider					
Payee	Houghton-Budde Mrs M				
Reason	Full settlement				
Vat Ref		Vat Amt	552.63		

Claims Values					
Total	5000.00	Own damage	5000.00	3rd party	0.00
Excess	500.00	Recov Amt	0.00	Paid	0.00
Claim Status	IN FORCE	O/S	4500.00		

- Enter Date
- Transaction Type– **Payment** - increases cost of claim (but reduces outstanding)
- Paid By field – Insurer/ Broker / Agg Excess / Other
- Category – as added under claims maintenance

- or **Recovery** – reduces cost of claim
- Paid By field - Insurer / Agg Excess / Client
- Category Field – as added under claims maintenance

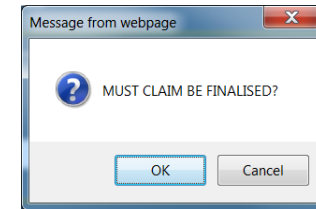
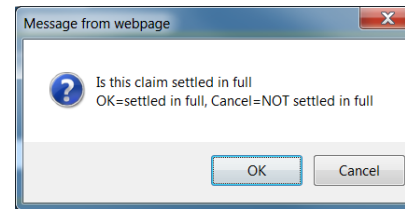
Update Category Codes

- **O – Maintenance, K - Claim Code - Transaction Category – Add**

- **Recovery Transaction** – figures entered bottom section

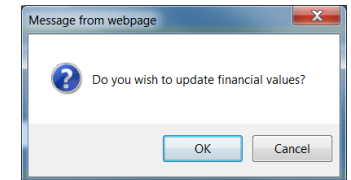
Discuss

- Reversing Transactions
- Credit Order Claim payments & Reversals thereof



Auto SMS

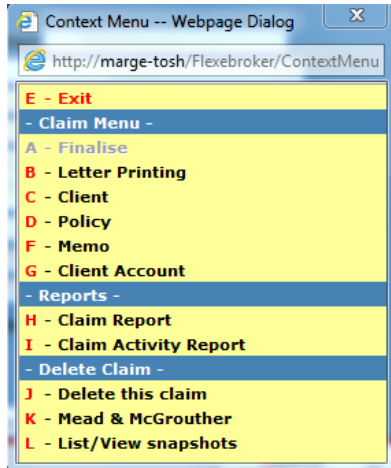
- Update Values as required
- Change Claim Status – **SETTLED**
- Finalise Screen – Diaries auto deleted



Update Status Codes

- **O – Maintenance, K - Claim Code - Status – Add**

Context Menu



- **NEWish** – List/View Snapshots

Finalise Claim

- Outstanding Diary entries display
- Enter date & update status
- Finalise date on Loss entry screen

Un-Finalise Claim

- Delete Date on Finalise Screen

Memos – Communication with Insurance Company

Memo Text	Date			
1. ID Doc 2.	22/03/2012	Edit	Delete	Print
Premium Paid - Enter the memo information in this field. ijd fij sdlfj dlsjf ldsjf lksjdf lkjsdf lj sdfkjsdf. jkhf jkhasdf hs dfkjhsdfk sdcjfh sdjfh kuashfk ushdf kushfd ukahds fkhsd fkuahseufkhsd kuf hksdfhjkdshf kjhdf jkhdf.	22/03/2012	Edit	Delete	Print
Documents Attached - Please find herewith the following documents; Claim Registratin form 3 x Repair quotations	27/03/2012	Edit	Delete	Print

Loaded

CLAIM MEMO

DATE : 27/03/2012
 TO : Zurich Insurance Company South Africa Limited
 ATT : Michele Smith

Claim Ref.	MITCM001-0001	Client	Mitchley	Phone	(031) 765 4898
Policy No.	SA GRP 0000000/0404	Renewal		Risk Class	Motor Private Type Vehicles
Date of Loss	01/11/2010	Description	S&G - Front windows broken & cell phone stolen	Contact	Michelle Smith
Insurance Co	Zurich Insurance Company South Africa Limited	Insurer Ref.			

Loss Details

Reported On	15/03/2012	How	e-mail	By	Mrs Budde
Area	DURBAN	Cause	smash and grab	Language	English
Details	Insured stopped at robot in Durban. Front left window was smashed and cell phone was stolen from vehicle.				
List of Items	2011 TOYOTA FORTUNER 4.0 V6 RB A/T 60054406	Assessor	Mike Johnson	Loss	23,000.00
Administrator	Mrs Frankie Sourgen	Case No	5487/12/03	Excess	1,500.00
Police Station	Durban			Client's Own Ref.	

Claim Question	Answer
Basic Excess	R1500
Car Hire	YES

Status: SETTLED

Other Party Details

Name	Mrs B Jones	Telephone	0834567485	Insurer	M&F
Address	55 North Drive, Durban, 4001	Policy	5478451457/0025	Reg. No	ND12345
Notes	Notes of the 3rd Party				

Financials

Claim Value	R 23,000.00	Own Damage	R 18,000.00	Third Party	R 5,000.00
Excess	R 1,500.00	Client Recovery	R 1,000.00	Agg. Excess	R 0.00
Paid	R 10,000.00	Insurer Recovery	R 1,000.00	Agg. Balance	R 0.00
Outstanding	R 11,500.00	Agg. Recovery	R 0.00	Agg. Contribution	R 0.00
		Total Recovery	R 2,000.00		

MEMO DETAILS
 Documents Attached - Please find herewith the following documents;
 Claim Registratin form
 3 x Repair quotations

BANK DETAILS

Bank	Branch Code	Branch
STANDARD BANK	051001	ELECTRONIC PAYMENTS
Account Name	Account Description	Account Number
ABC SHOE STORE	Current	548789608514

Client Account

Account summary

Client: HOUGM004 Houghton-Budde Mrs M - P O Box 15147, Ashwood, Pinetown, 3600

Branch: Durban **Administrator:** Taylor **Group:** SABC Group

Bal b/f	-500.00	Dr	24,181.20	Cr	661.39	Rec	8,826.29	Jnls	500.00	Bal c/f	14,693.52
Curr	0.00	30	0.00	60	0.00	90	0.00	120+	14,693.52	Unalloc	0.00

Account enquiry

Account: **Info:** **Contact name:** Marge **Business tel:** (031) 765 4898

Details	Dated	Reference	Amount	Balance
UNALLOCATED B/F			-500.00	
U-JNL RE-ALLOCATION	20/03/2012		500.00	
UNALLOCATED TOTAL			0.00	
<u>HOUGM004/0008/002-C1203</u>	31/03/2012		-114.59	0.00
REC DEBIT ORDER RUN 100006930	20/03/2012	AUTO	114.59	
<u>HOUGM004/0008/001-C1203</u>	31/03/2012		-546.80	0.00
REC DEBIT ORDER RUN 100006930	20/03/2012	AUTO	546.80	
<u>HOUGM004/0008/***-D1203</u>	31/03/2012		2,621.50	0.00
REC DEBIT ORDER RUN 100006930	20/03/2012	AUTO	-2,621.50	
<u>HOUGM004/0007/***-10047</u>	05/03/2012		2,977.00	0.00
REC 100006920	19/03/2012	B12/03	-2,977.00	
<u>HOUGM004/0006/001-10048</u>	08/03/2012		14,716.52	14,693.52
REC 100006920	19/03/2012	B12/03	-23.00	
JNL RE-ALLOCATION 100007025	20/03/2012		-500.00	
JNL Allocated against client 100007026	20/03/2012	MHB	500.00	
<u>HOUGM004/0005/***-D1203</u>	31/03/2012		2,118.62	0.00
REC DEBIT ORDER RUN 100006930	20/03/2012	AUTO	-2,118.62	
<u>HOUGM004/0001/***-D1203</u>	31/03/2012		1,747.56	0.00
REC DEBIT ORDER RUN 100006930	20/03/2012	AUTO	-1,747.56	

DISCUSS

- Claim Activity Report
- Delete this claim
- Mead & McGrouther
- Reports