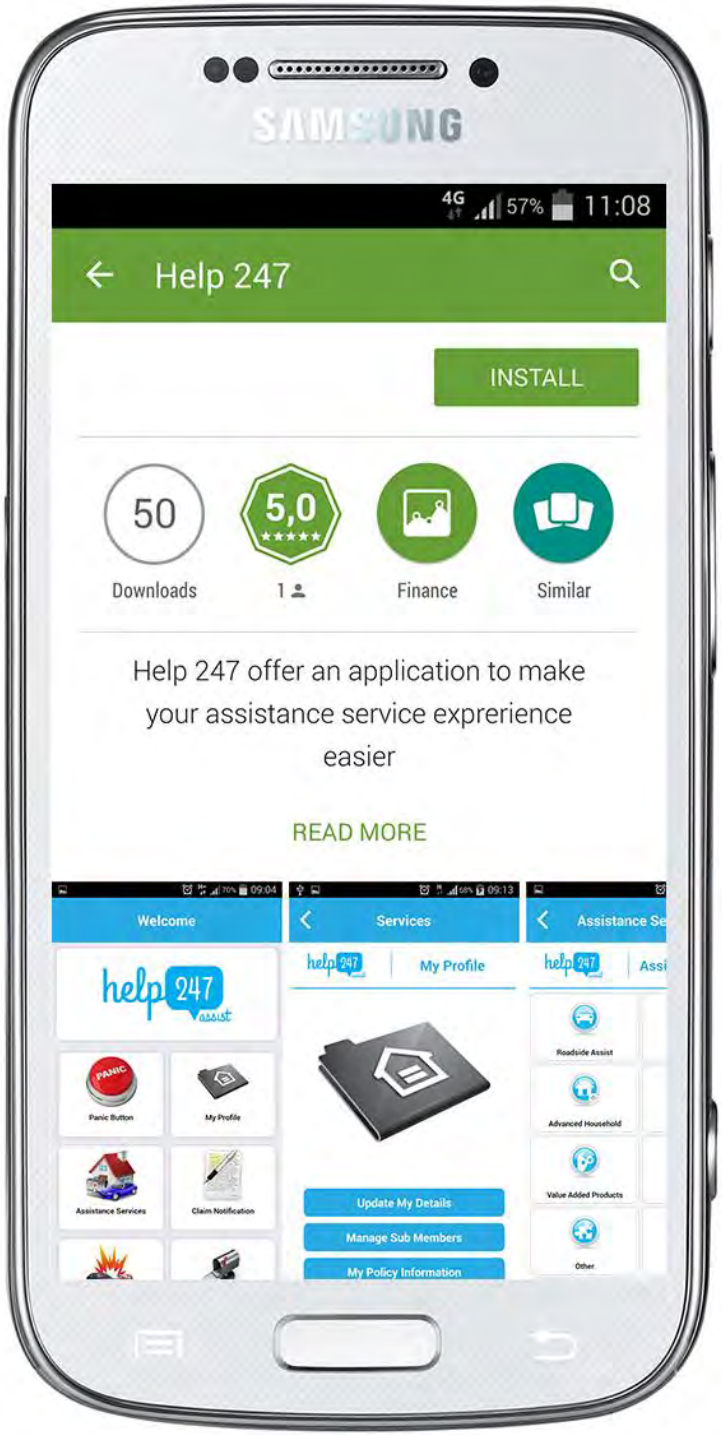
BROLINK

Mobile Application Process

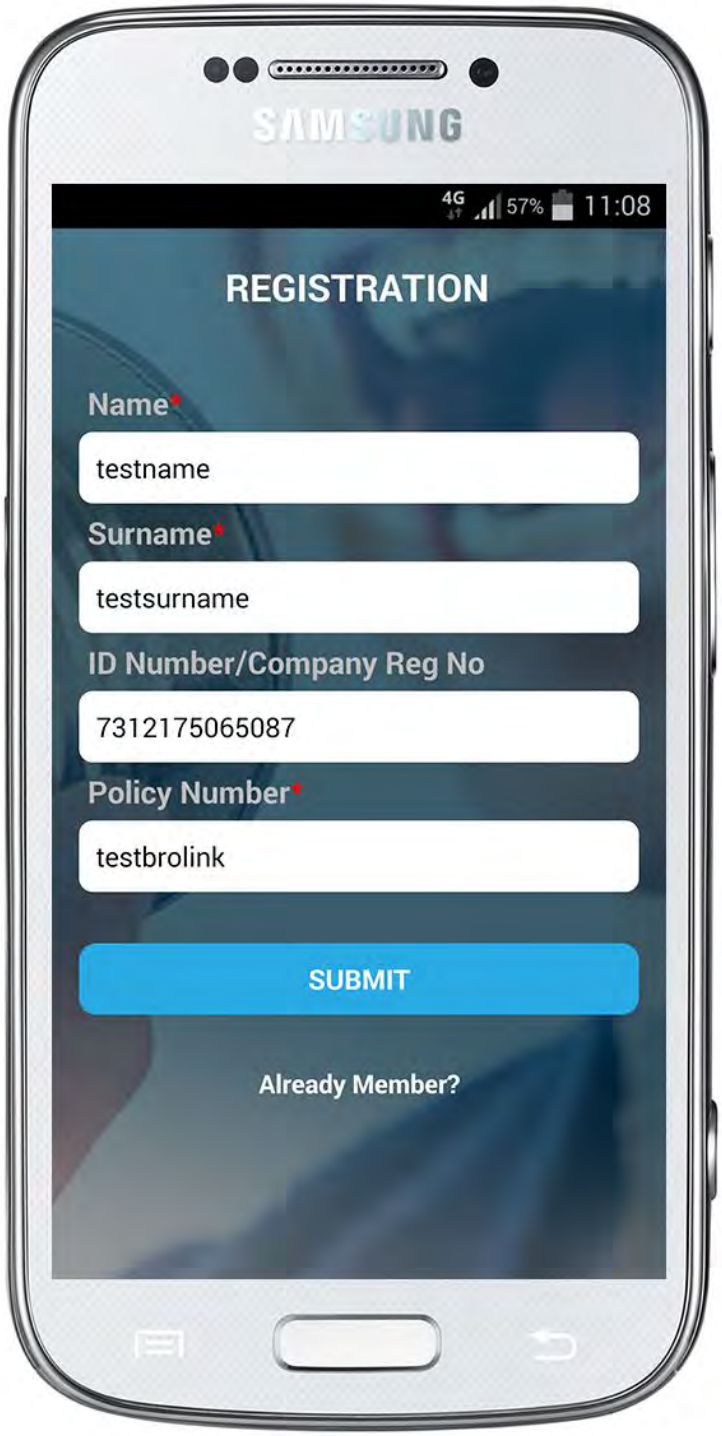
Customer Loyalty Consultants



Downloading the Help 247 App:

Go to the Apple or Android App store.
Search “Help247” from the App store.
Click on “Install”
The Help247 App and features will need to be linked to a broker or insurer that has a unique programme with Customer Loyalty Consultants.

Customer Loyalty Consultants



Registration Process:

Once the App has downloaded, the client has to register with the following:

- Name/Company Name
- Surname
- ID / Company Reg No.
- Policy Number

Click on “Submit”

Customer Loyalty Consultants

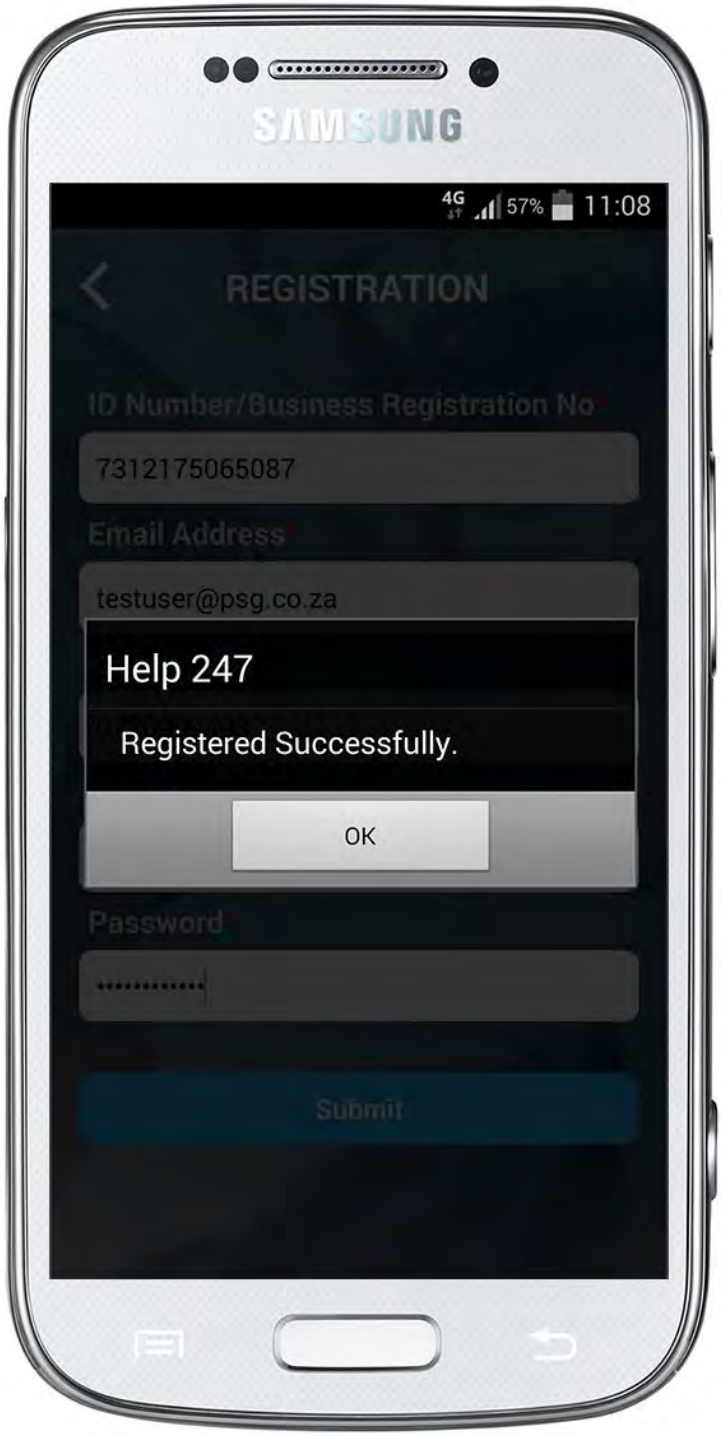
Registration Process:

Add the following information:

- ID No / Business Reg No.
- Email Address
- Cell No.
- Username and password

Click on “Submit”

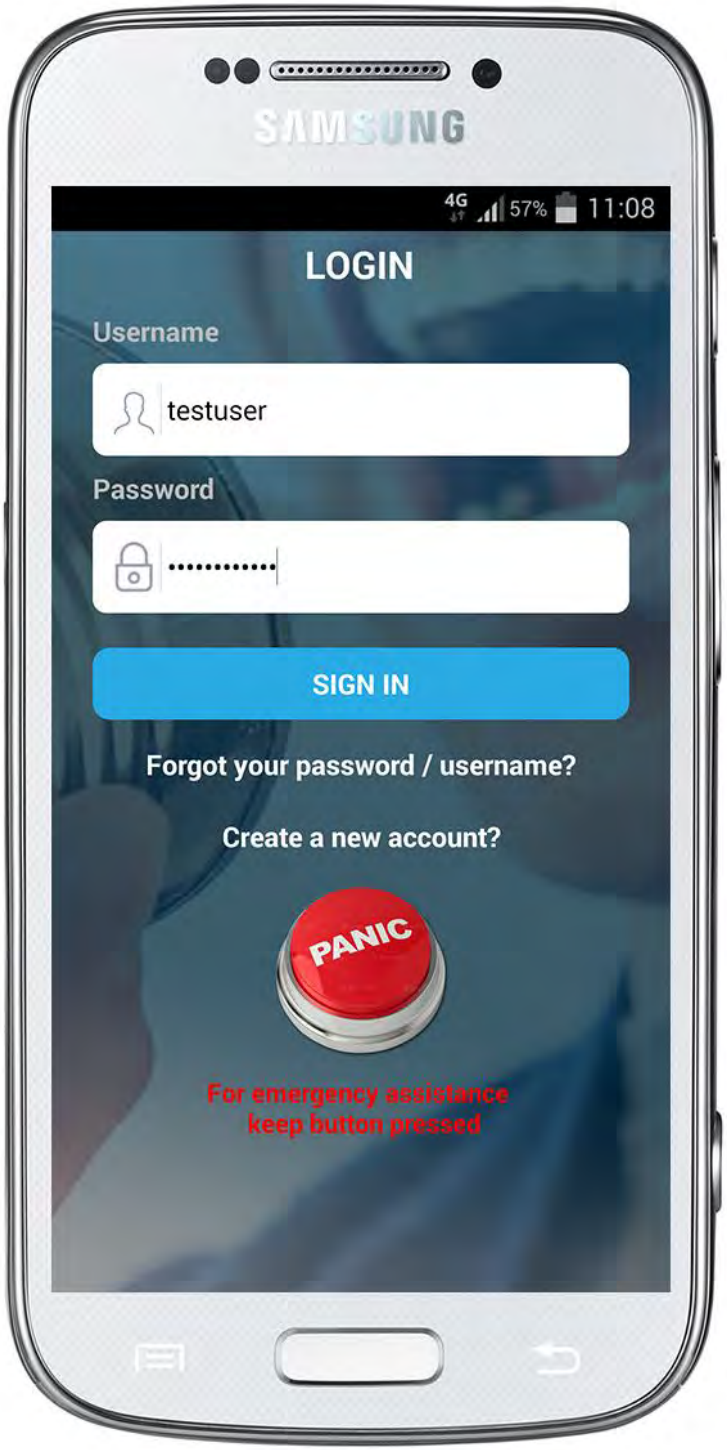
Customer Loyalty Consultants



Registration Process:

The App will indicate to the client that the registration process was successful.

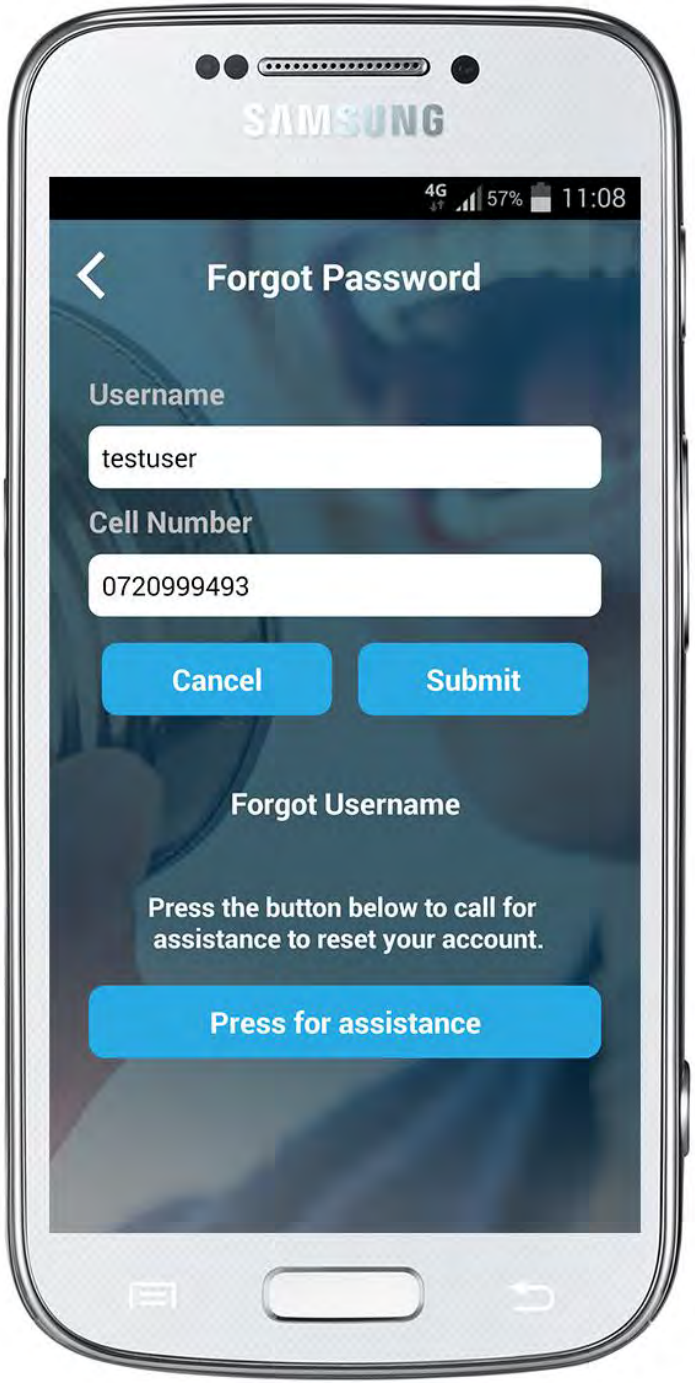
Customer Loyalty Consultants



Login

Username and password will be requested when logging in.

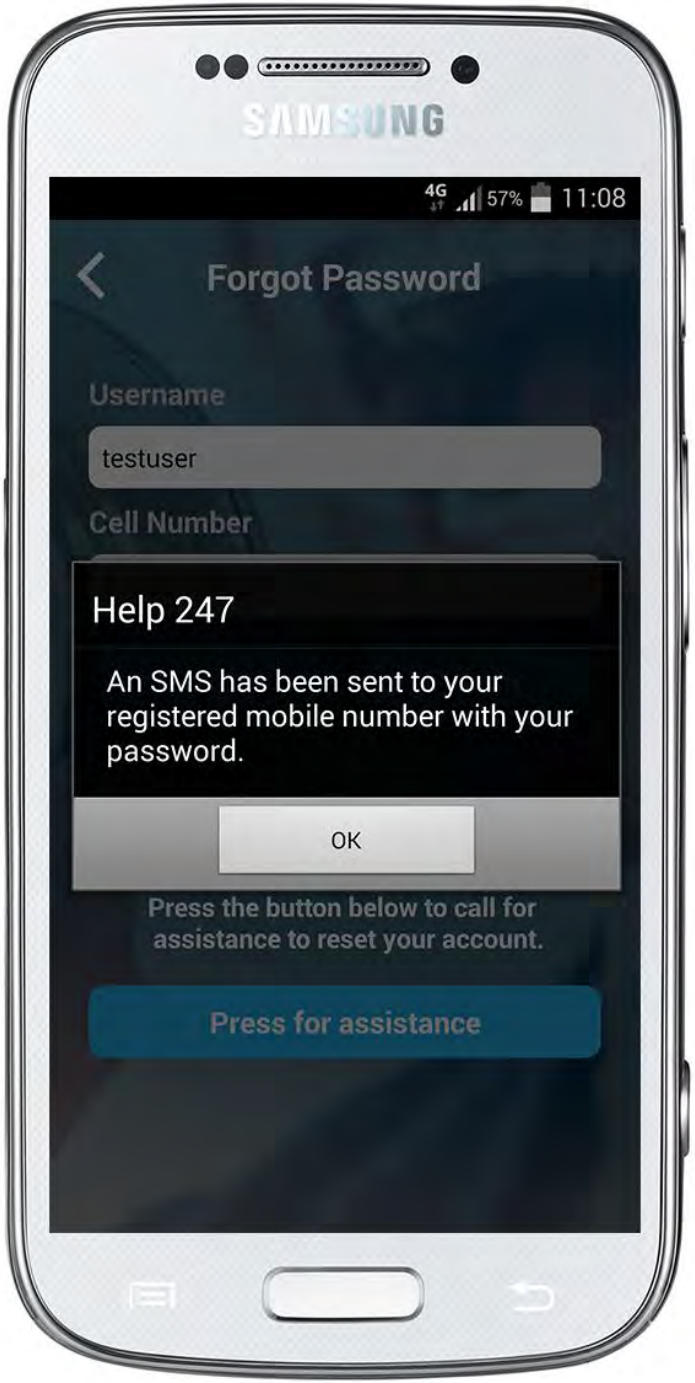
Customer Loyalty Consultants



Forget Password

If the client in future forgets the username and password the client will click on forget username and the username and password will be sent to the client via sms

Customer Loyalty Consultants



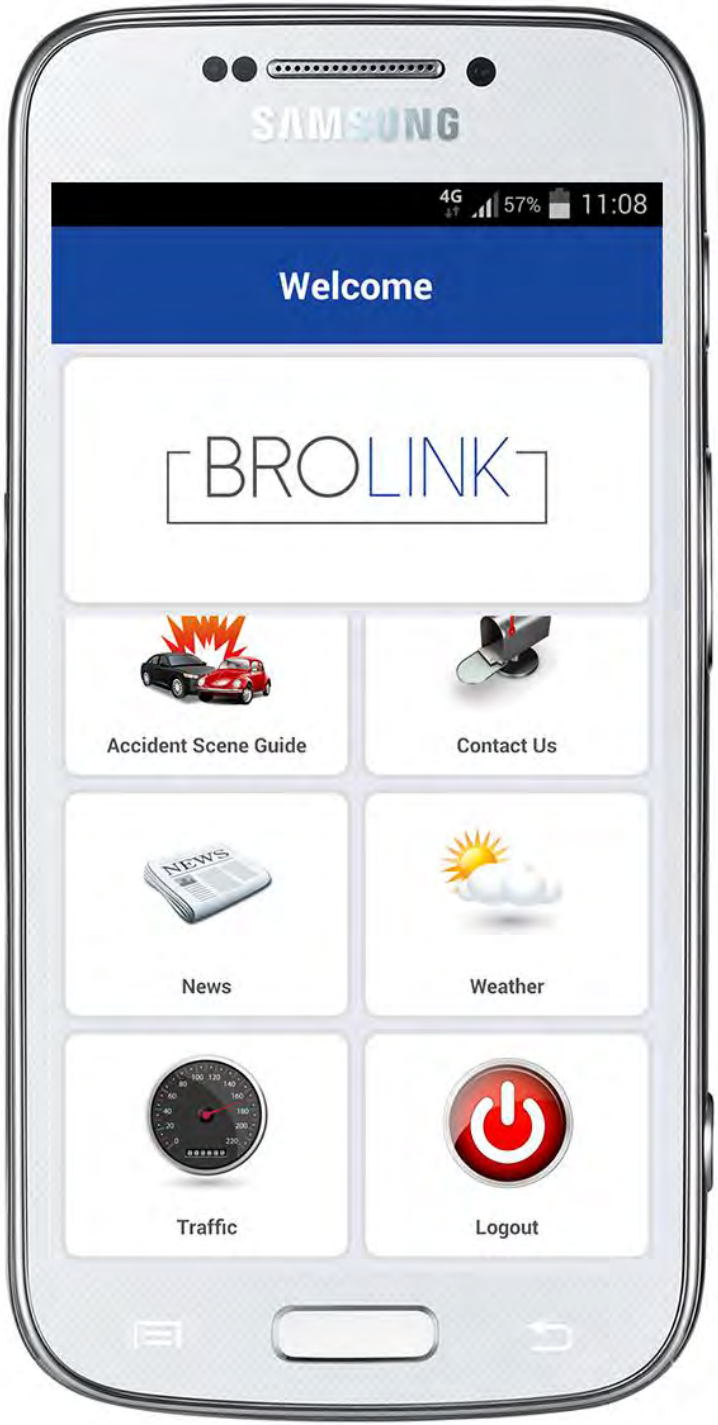
Customer Loyalty Consultants

Home Page:

Once login was successful, this home page will appear.

The logo and scheme colour will be as per pre arrangement with client.

Customer Loyalty Consultants



Home Page:

When scrolling down on home page.

Customer Loyalty Consultants

Panic Button:

The “Panic Button” will GPS co-ordinate the clients location.

When pressing the “Panic Button” for 2 seconds, the button will turn green and display the message “**A customer relations consultants will contact you shortly**”.

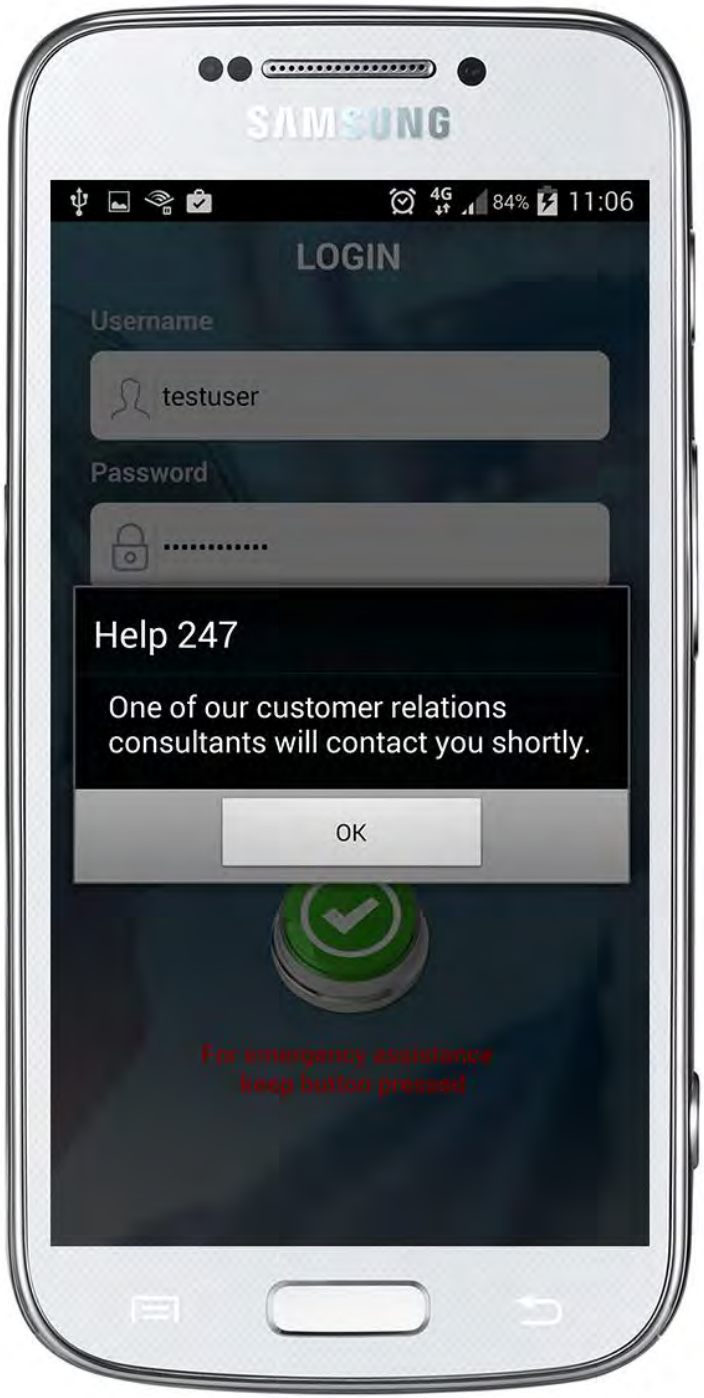
.

Customer Loyalty Consultants

Panic Button:

Panic Button shows green to indicate that the panic was successful.

Customer Loyalty Consultants



Panic Button:

When pressing the “Panic Button” for 2 seconds, the button will turn green and display the message “**A customer relations consultants will contact you shortly**”.

Customer Loyalty Consultants

Panic Button in contact centre:

CLC's contact centre will receive the GPS coordinates of the client, as well as client information.
This automatically logs a call on CLC's system.

The contact centre will then phone the client to log a call.

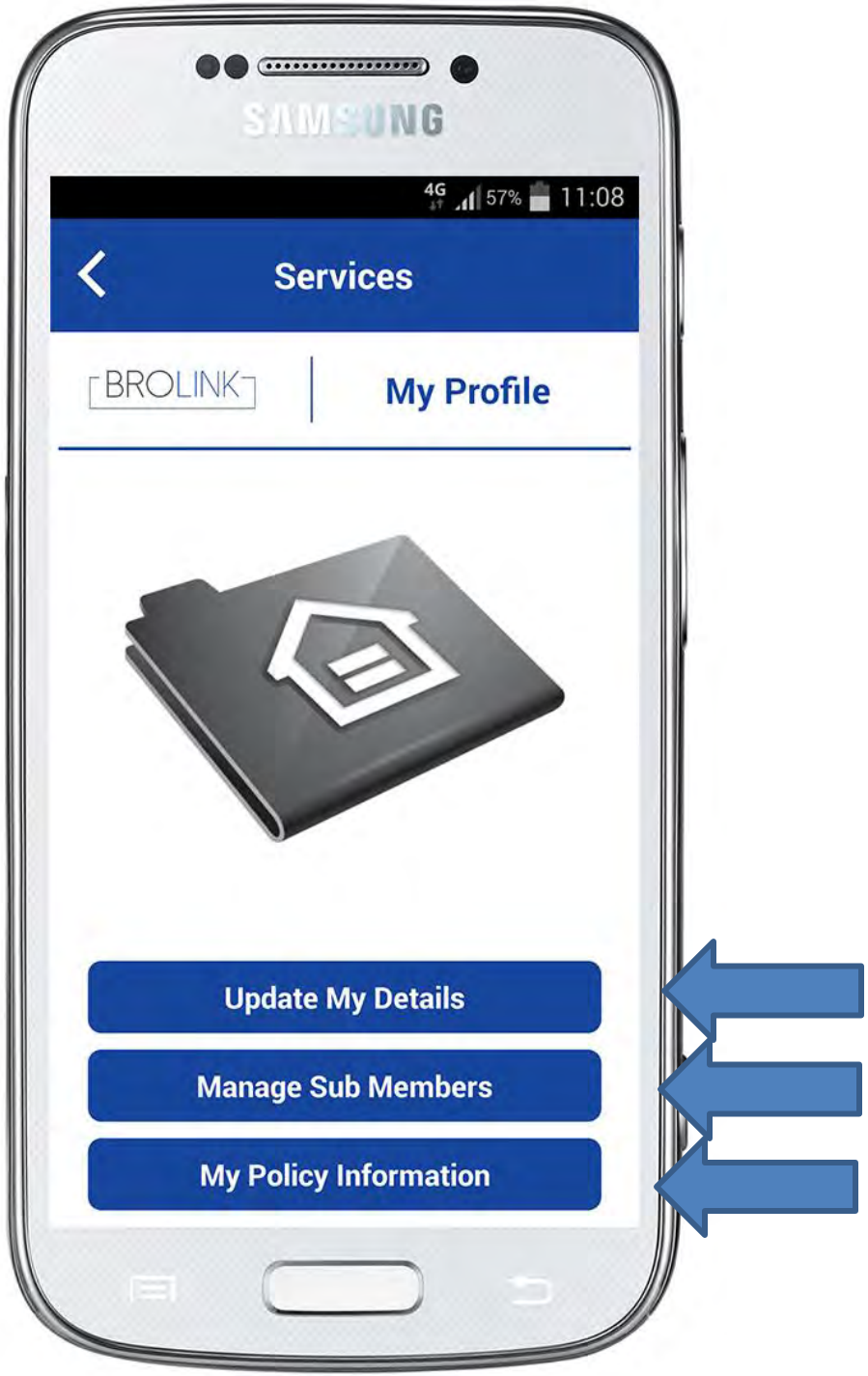
Customer Loyalty Consultants

My Profile:

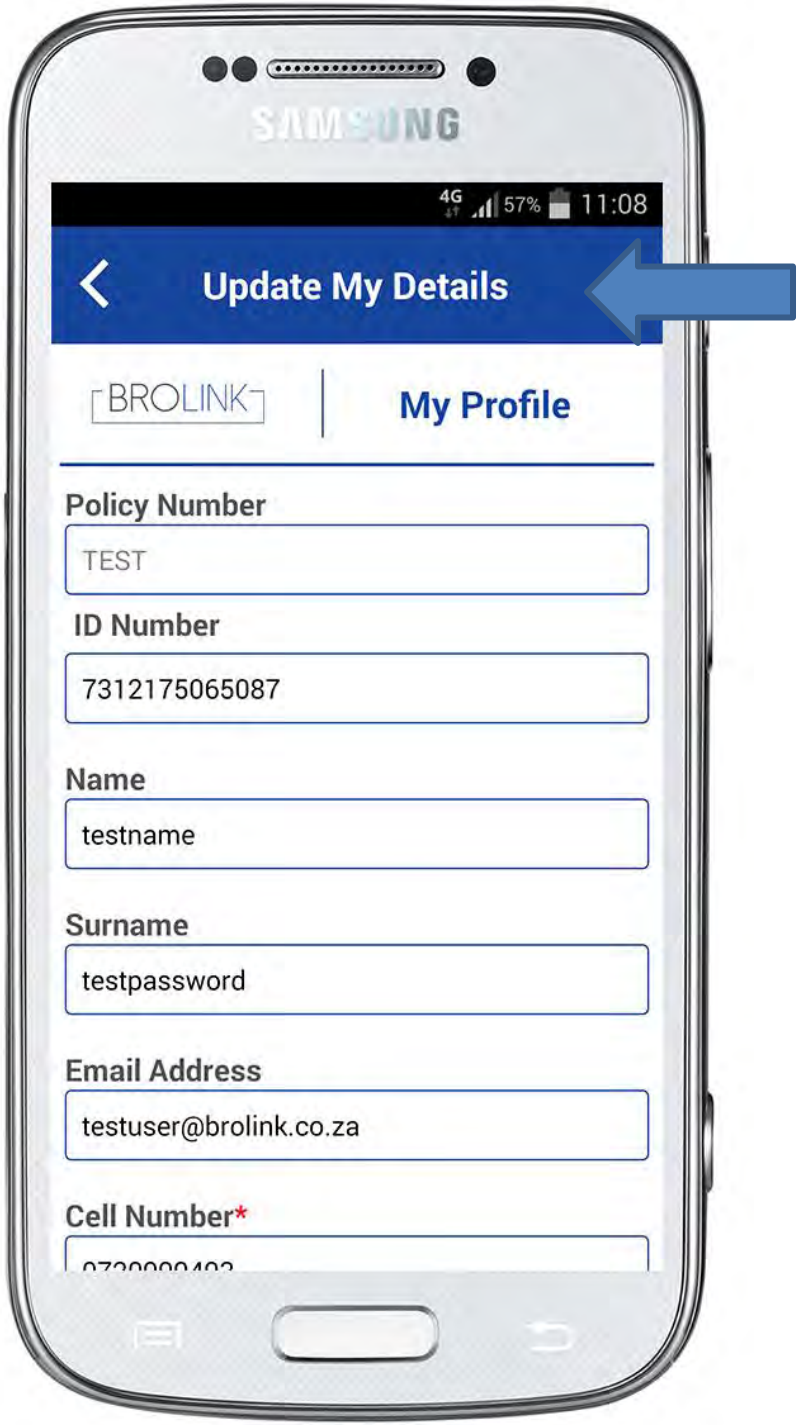
This allows the client to;

- Update their existing profile
- Add/manage sub members (spouse, children / drivers on commercial policy)
- View policy information

Customer Loyalty Consultants



Customer Loyalty Consultants



Update My Details:

Allowing the client to change personal details, add medical aid company, security company etc.
This is the information that will display on CLC's internal system once the client has pressed the panic button.

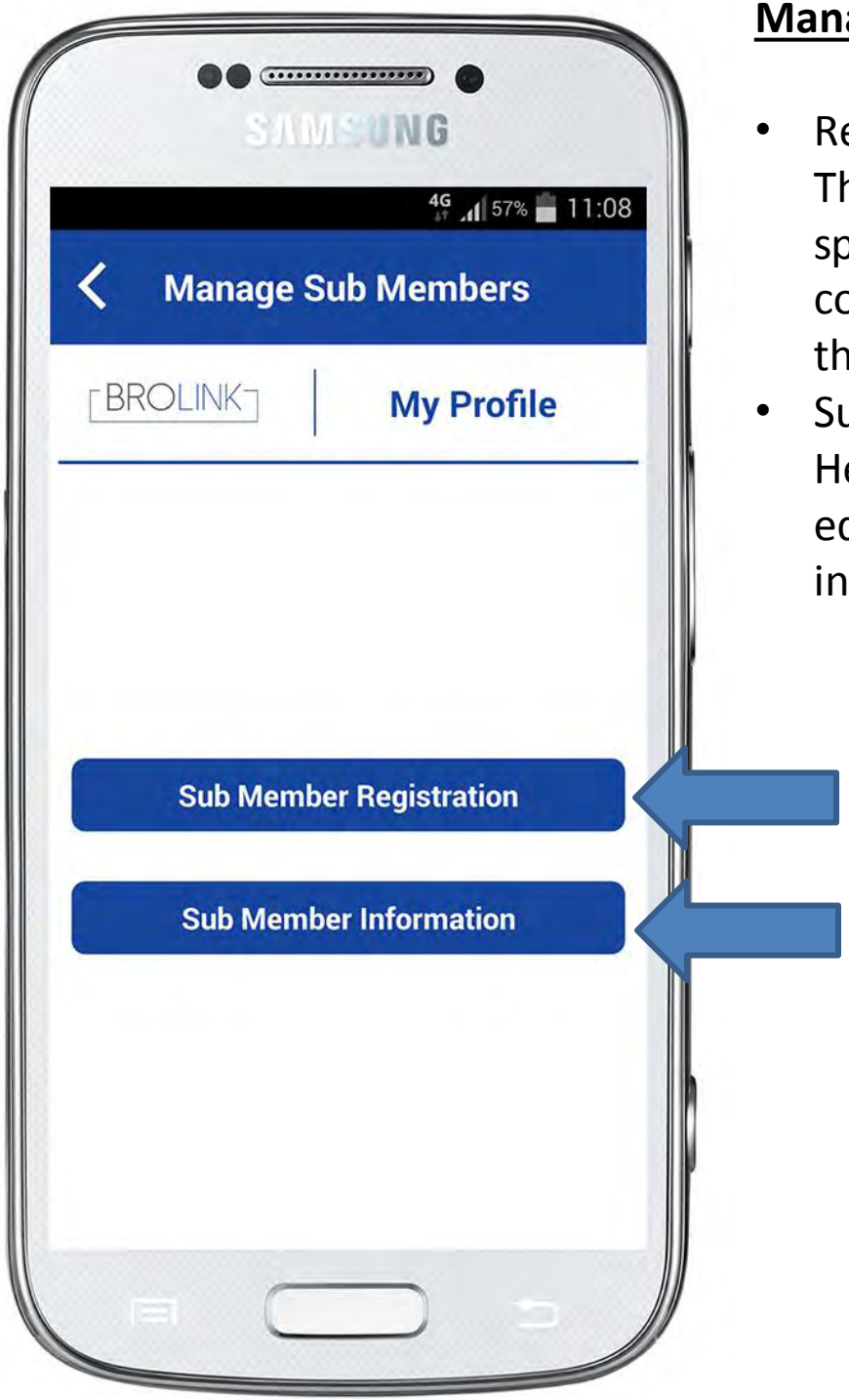
Customer Loyalty Consultants

Manage Sub Members:

Click on “Manage Sub Members, this will allow the client to;

- Register Sub Members
- Sub Member Information

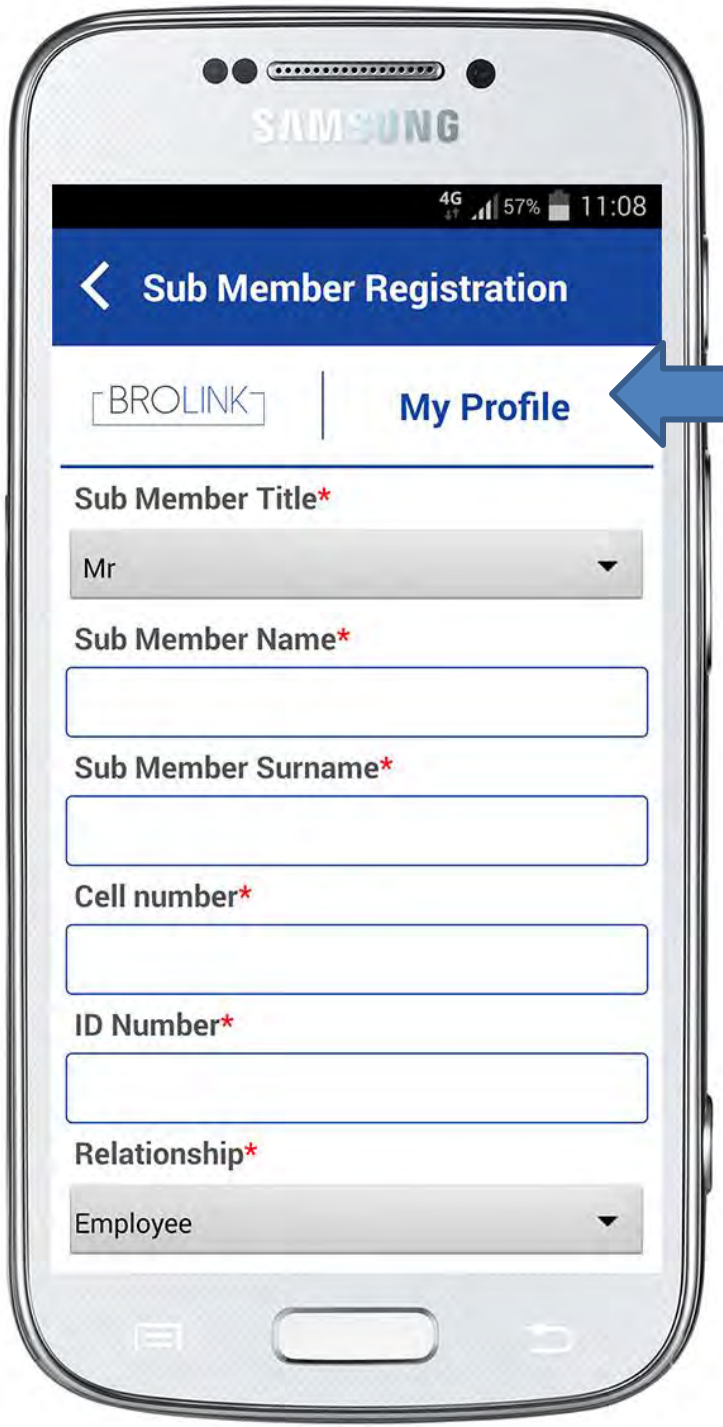
Customer Loyalty Consultants



Manage Sub Members:

- Register Sub Members – This can either be the clients spouse and children, or in a commercial policy drivers of the fleet vehicles
- Sub Member Information – Here the client can view and edit sub member information

Customer Loyalty Consultants

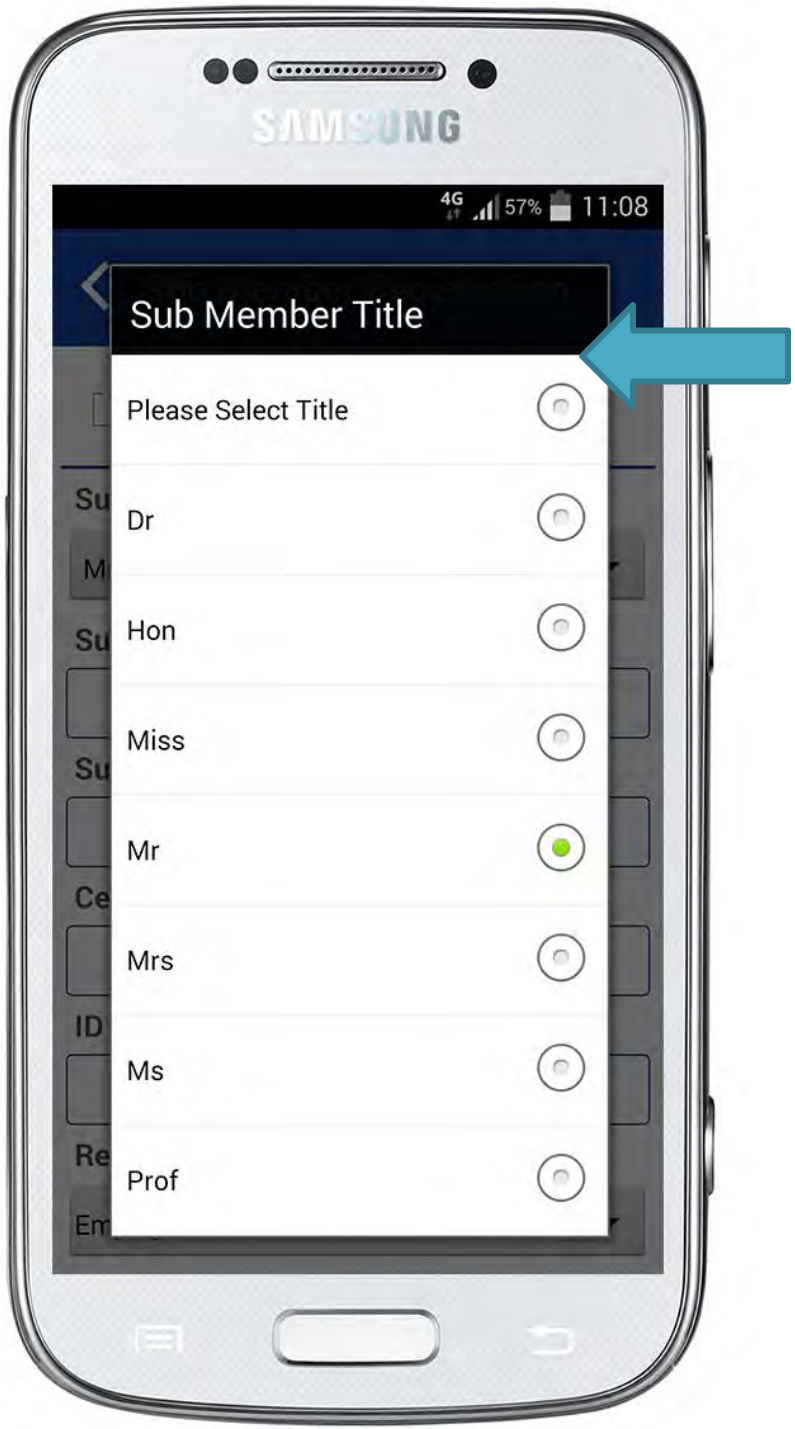


Sub Member Registration:

Add sub member information:

- Title
- Sub member name
- Sub member surname
- Cell number
- ID Number
- Relationship

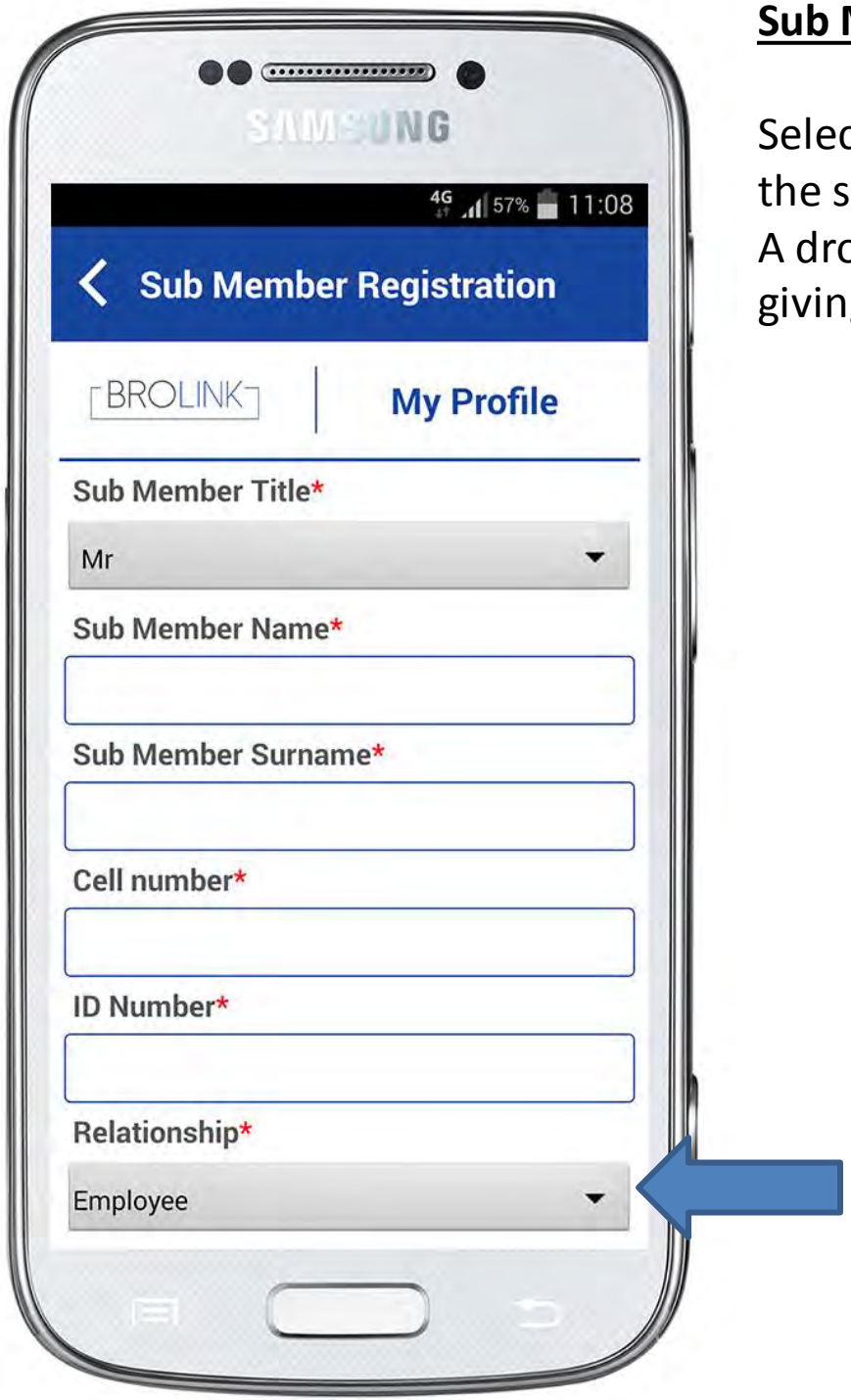
Customer Loyalty Consultants



Sub Member Registaration:

Select the “Title” of the sub member.

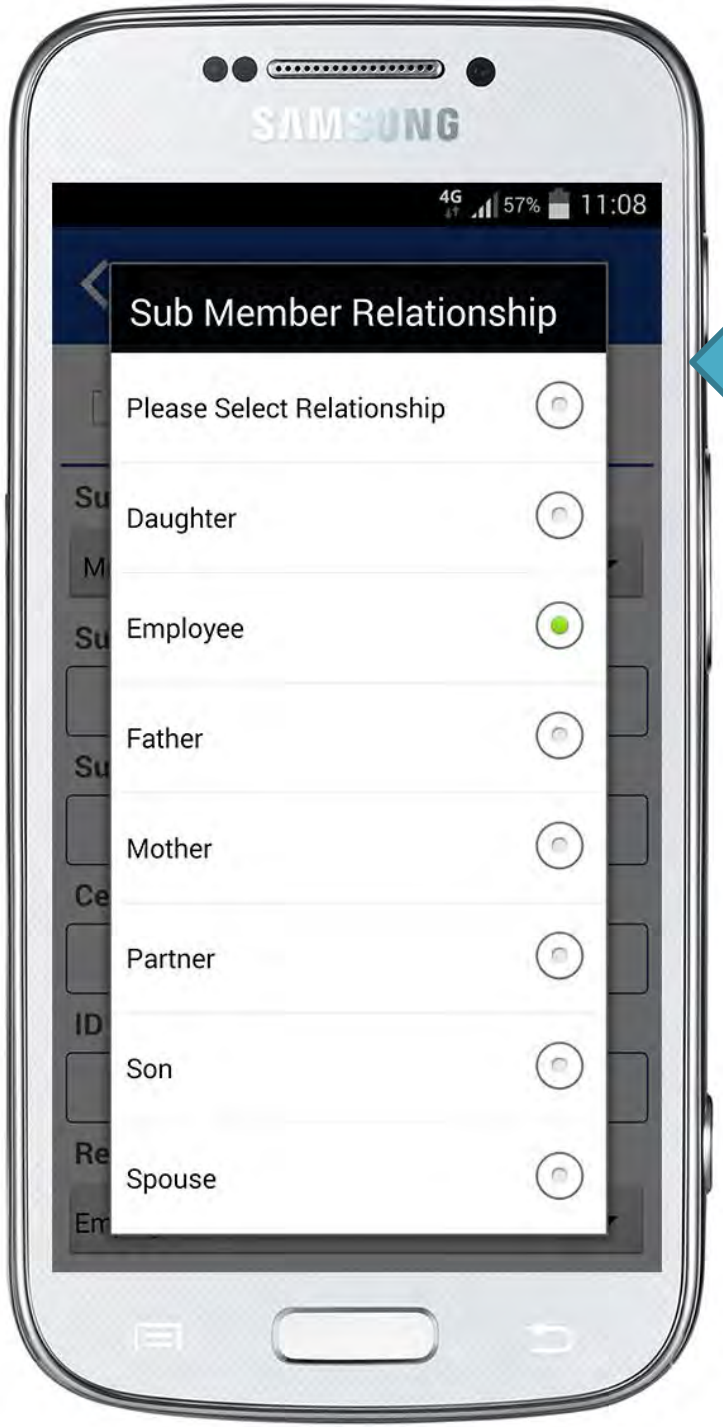
Customer Loyalty Consultants



Sub Member Registration:

Select the relationship with the sub member.
A dropdown will appear giving you different options.

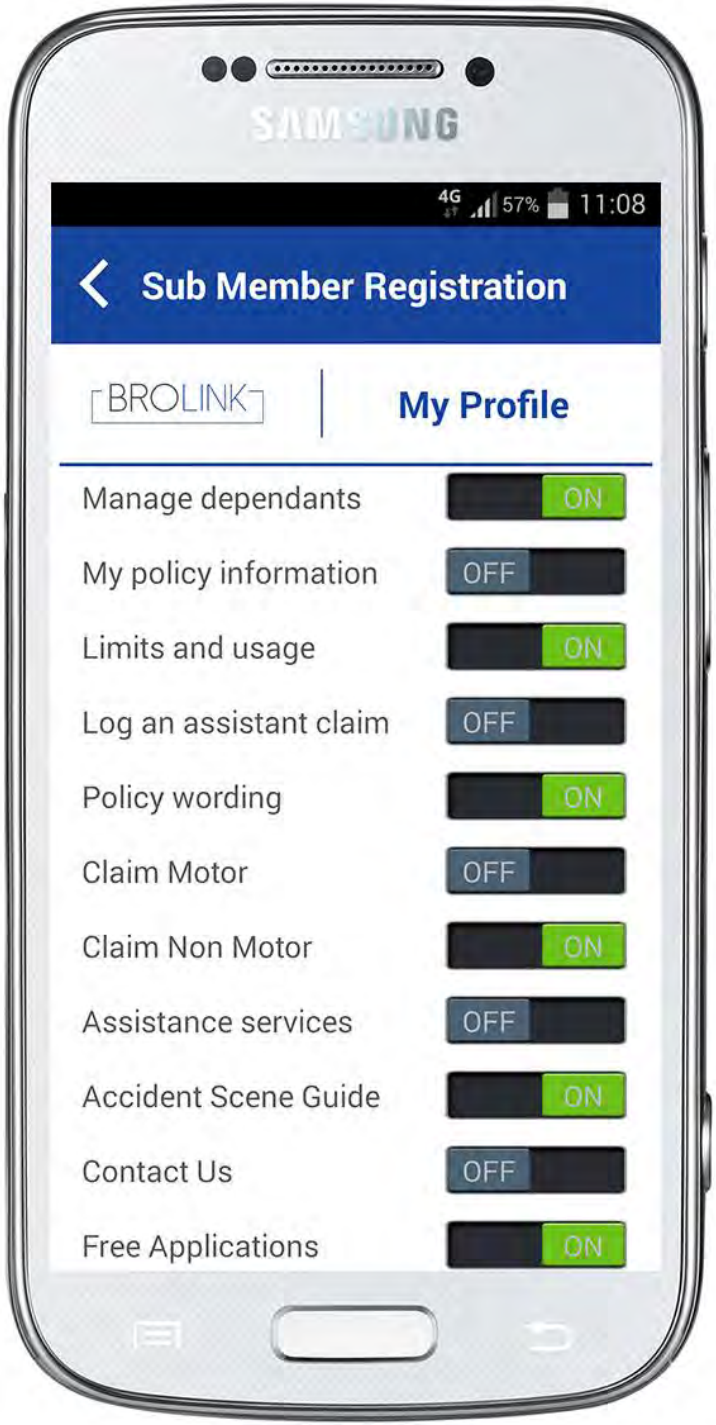
Customer Loyalty Consultants



Sub Member Registration:

Dropdown with options to select the relationship with sub member.

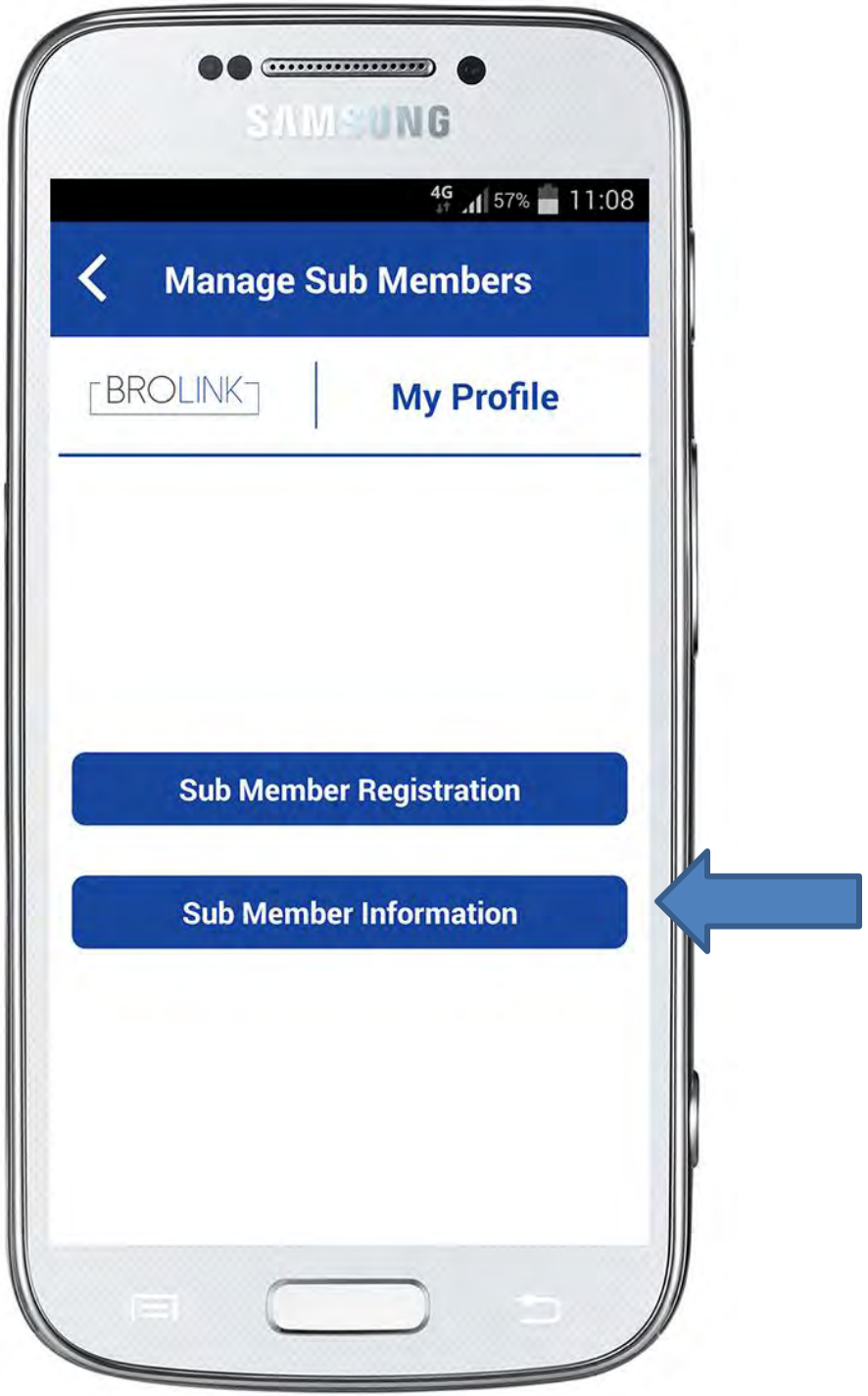
Customer Loyalty Consultants



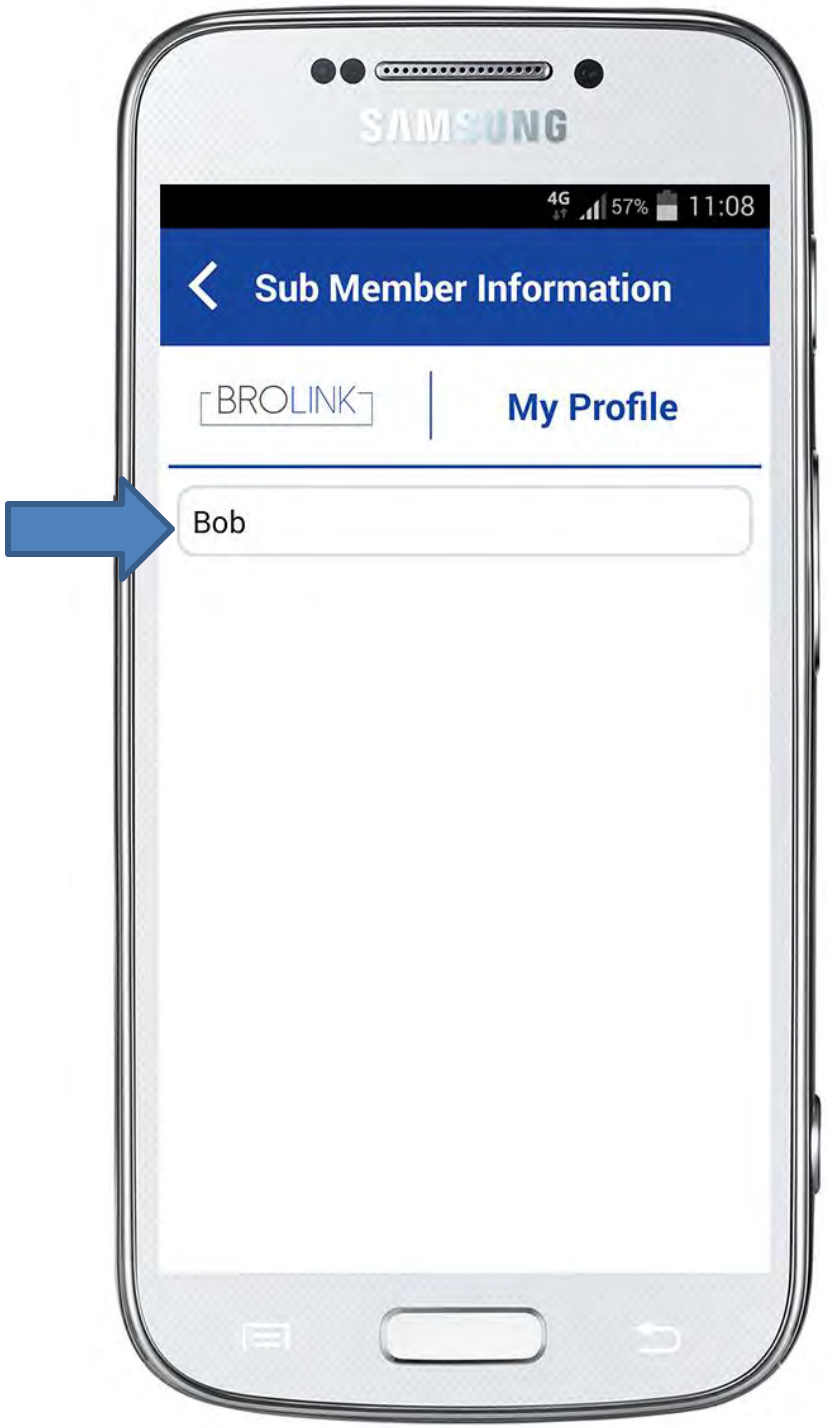
Sub Member Registration:

Here you would be able to manage your sub members level of access on the App. Switch on or off certain functions by sliding the “on/off” to the left or right.

Customer Loyalty Consultants



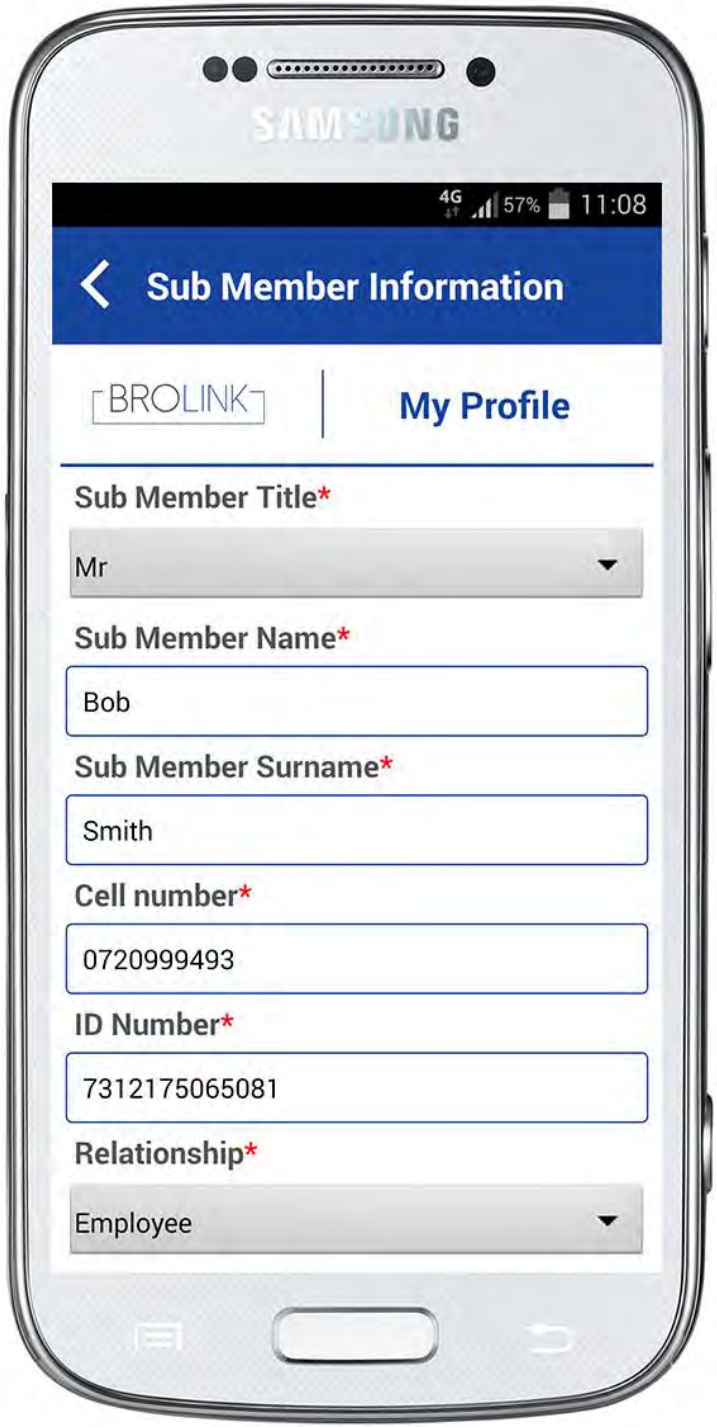
Customer Loyalty Consultants



Editing Sub Member Information:

This will allow the client to view who has been added under sub members, if you click on the name you would be able to edit and save again.

Customer Loyalty Consultants



Editing Sub Member Information:

If you need to change sub member information, do the required changes and submit.

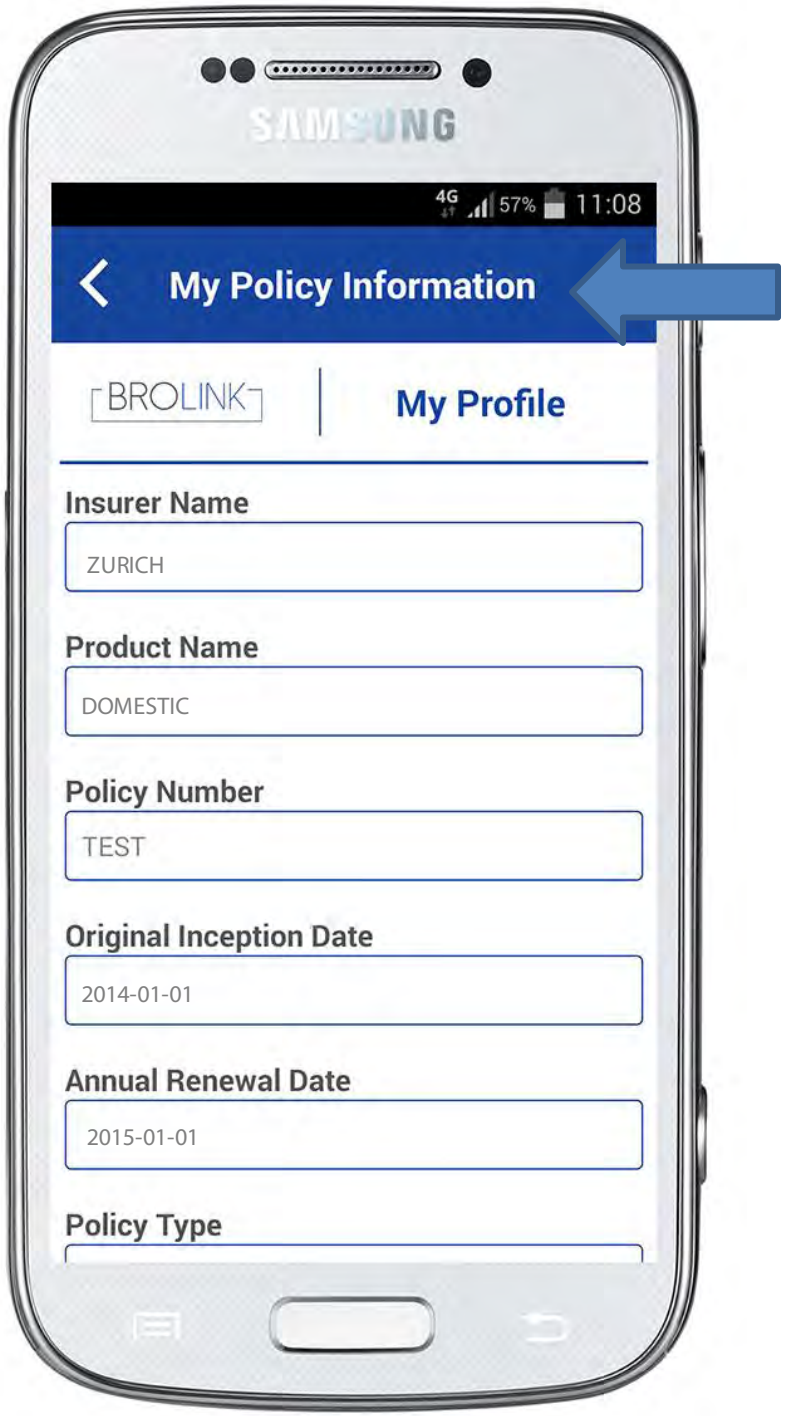
Customer Loyalty Consultants

My Policy Information:

The App allows integration to all administration systems, and provides the client with a short summary of:

- Policy number
- Inception date
- Status of the policy (active or cancelled)
- Covered Items
- Premium

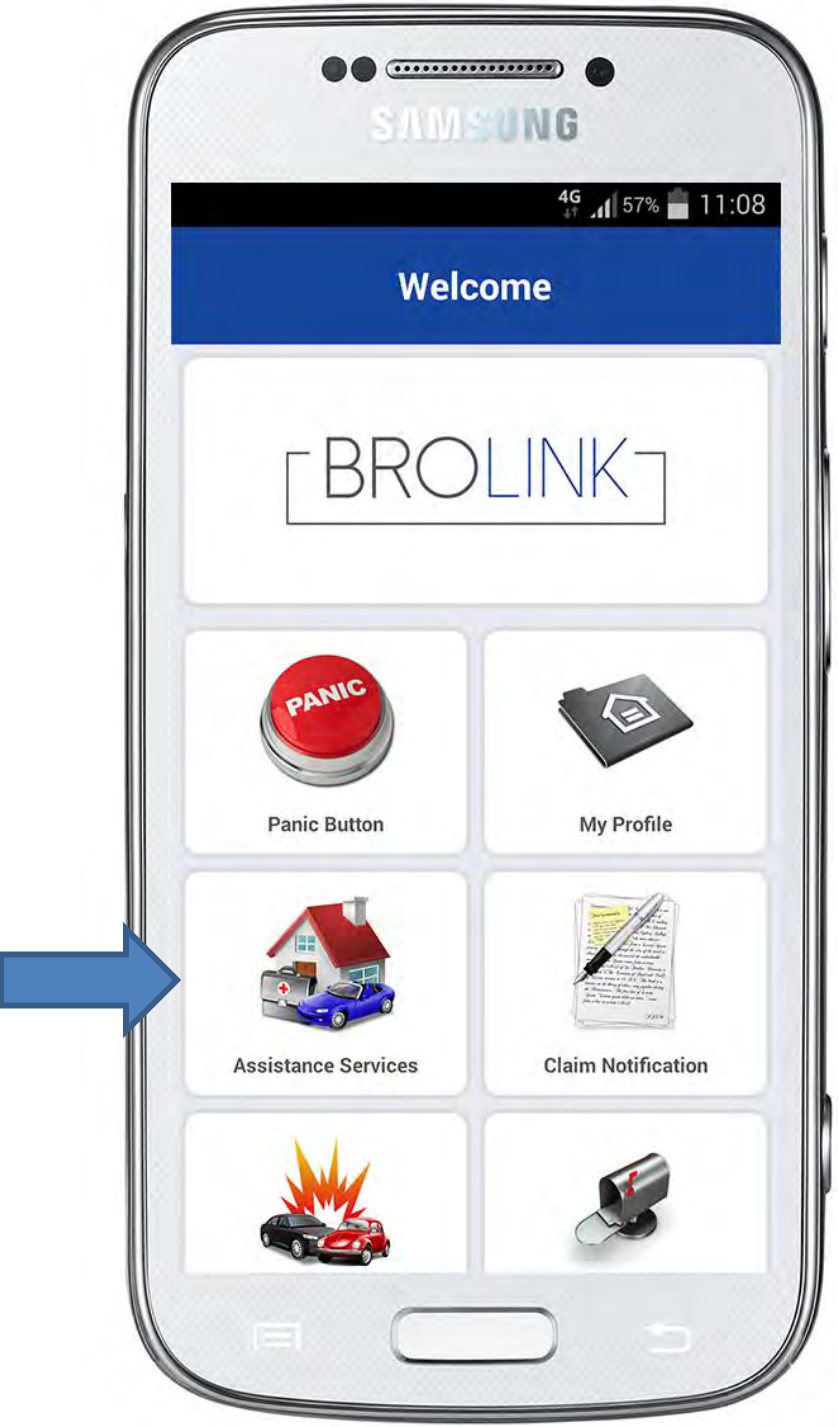
Customer Loyalty Consultants



My Policy Information:

This information will show as it is on the insurer underwriting system.

Customer Loyalty Consultants

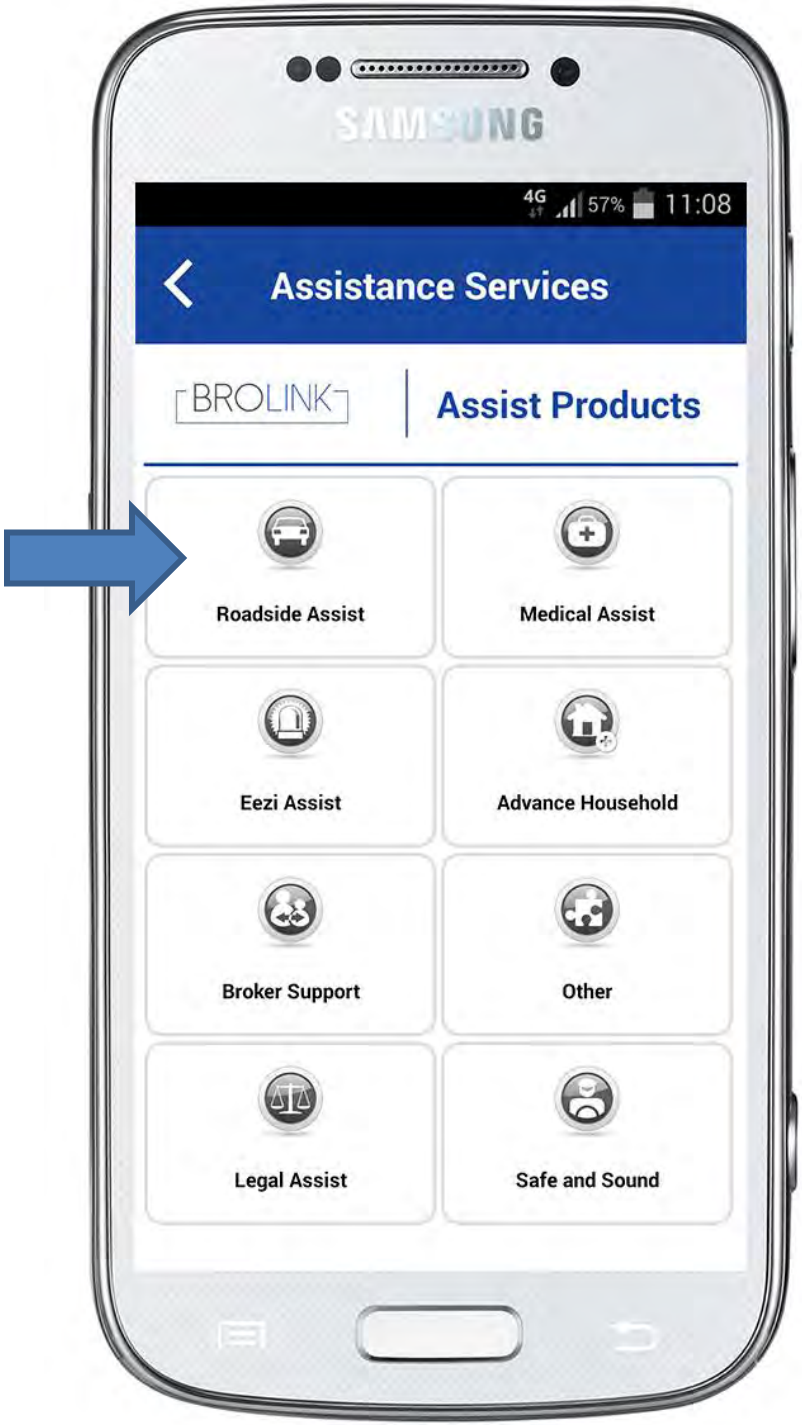


Assistance Services:

Convenience at the clients fingertips!
View assist products that is linked to the clients insurance policy (Products to be chosen by the main scheme)

- Roadside Assistance
- Household Assistance
- Medical Assistance
- Legal Assistance

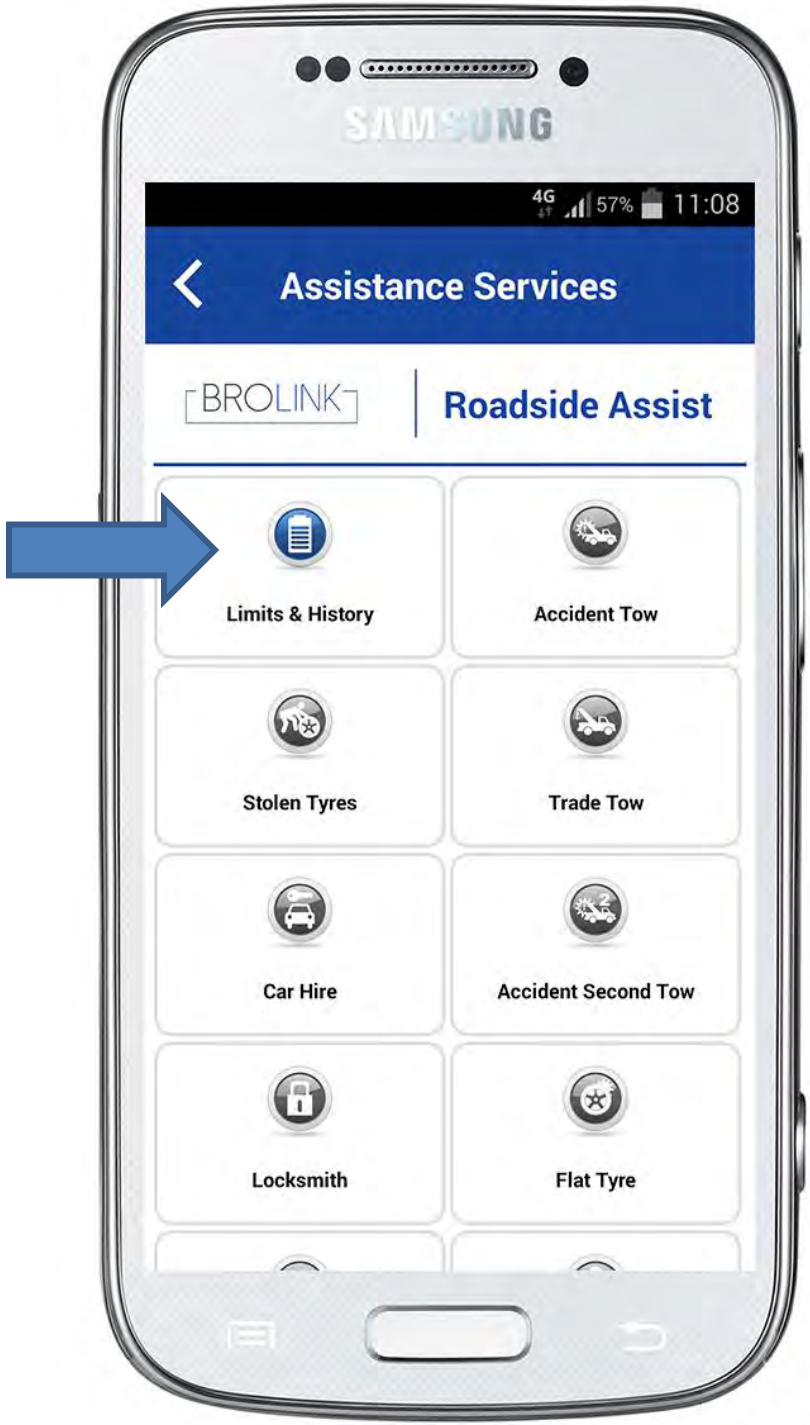
Customer Loyalty Consultants



Assist Products:

When selecting a product, the client will have a detailed list of the selected product

Customer Loyalty Consultants



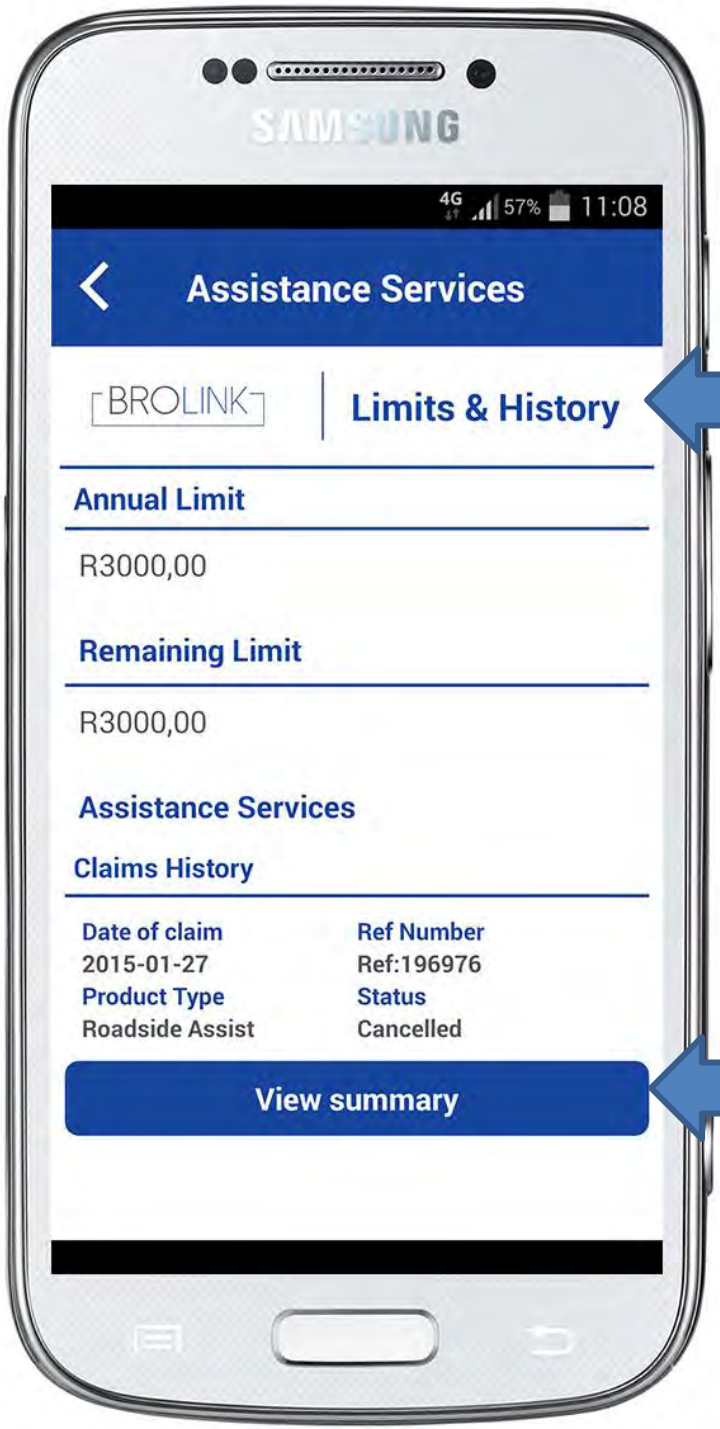
Assist Products:

When a product is selected in this case "Roadside Assist"; the client will be able to view:

Limits & History of previous calls logged; sub categories of roadside assistance;

- Accident Tow
- Stolen Tyres
- Trade Tow
- Taxi
- Car Hire
- Accident Second Tow
- Locksmiths

Customer Loyalty Consultants



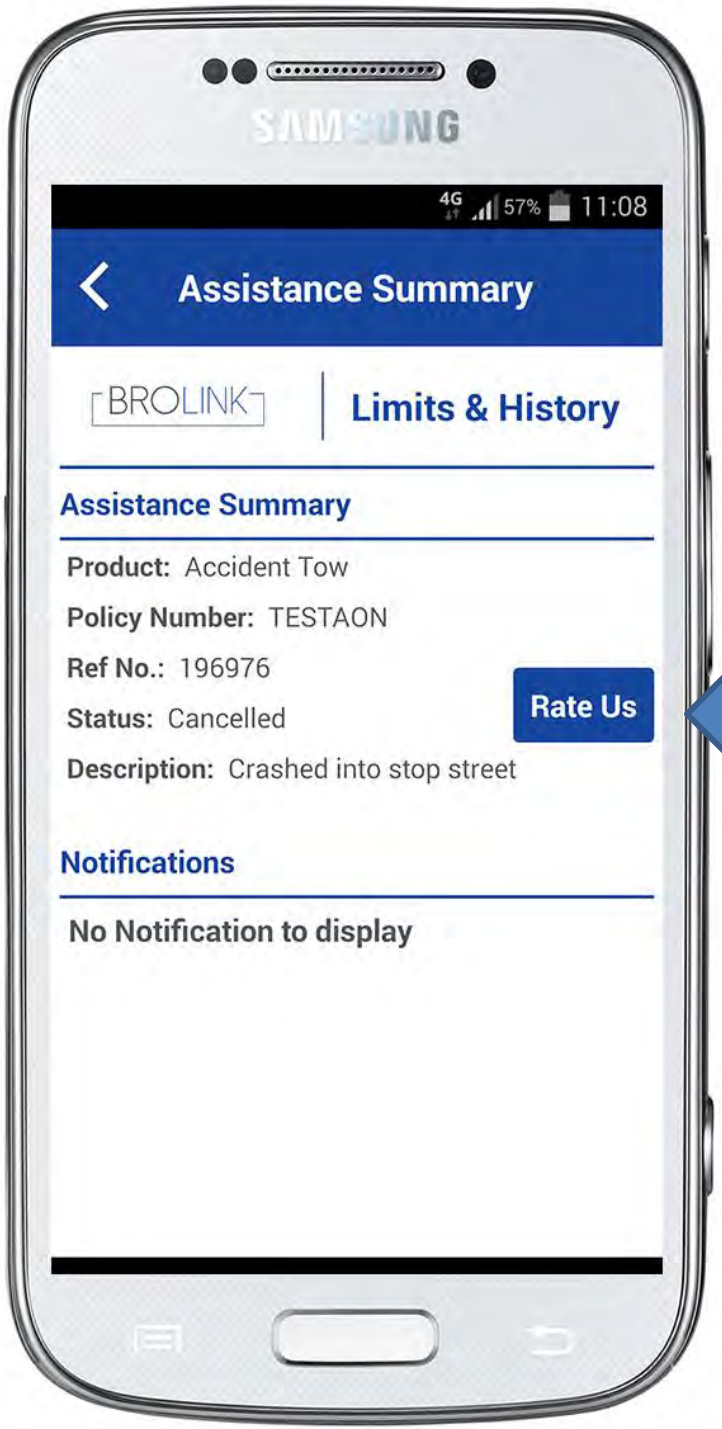
Limits & History:

Annual limit available per product, remaining limits and assistance services claims history.

Click on “View Summary” you will see the following:

- Product
- Policy number
- Reference
- Status
- Description

Customer Loyalty Consultants

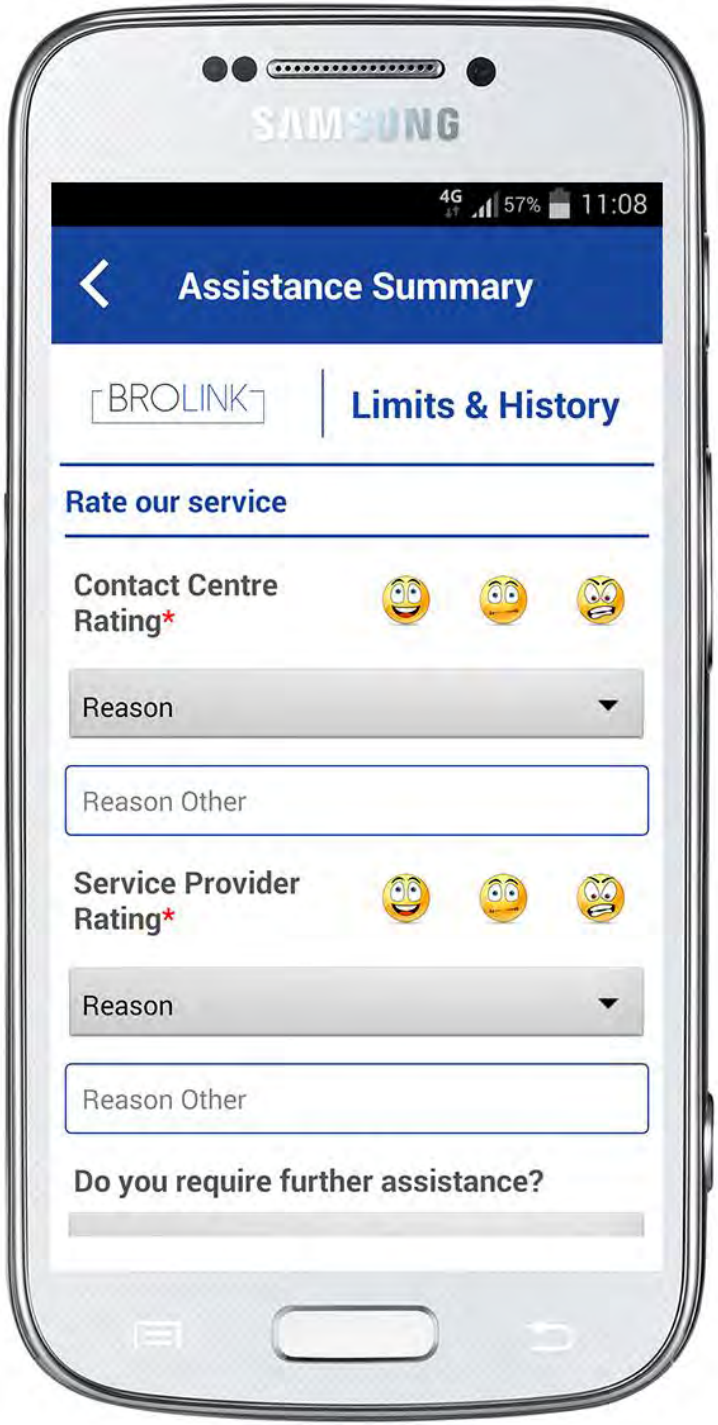


Limits & History Assistance Summary:

- Product
- Policy Number
- Ref No
- Status
- Description

Click on “Rate Us”

Customer Loyalty Consultants



Rate Us:

The client would be able to rate the service of the contact centre, as well as the service provider.

The client can also indicate if any further assistance is required.

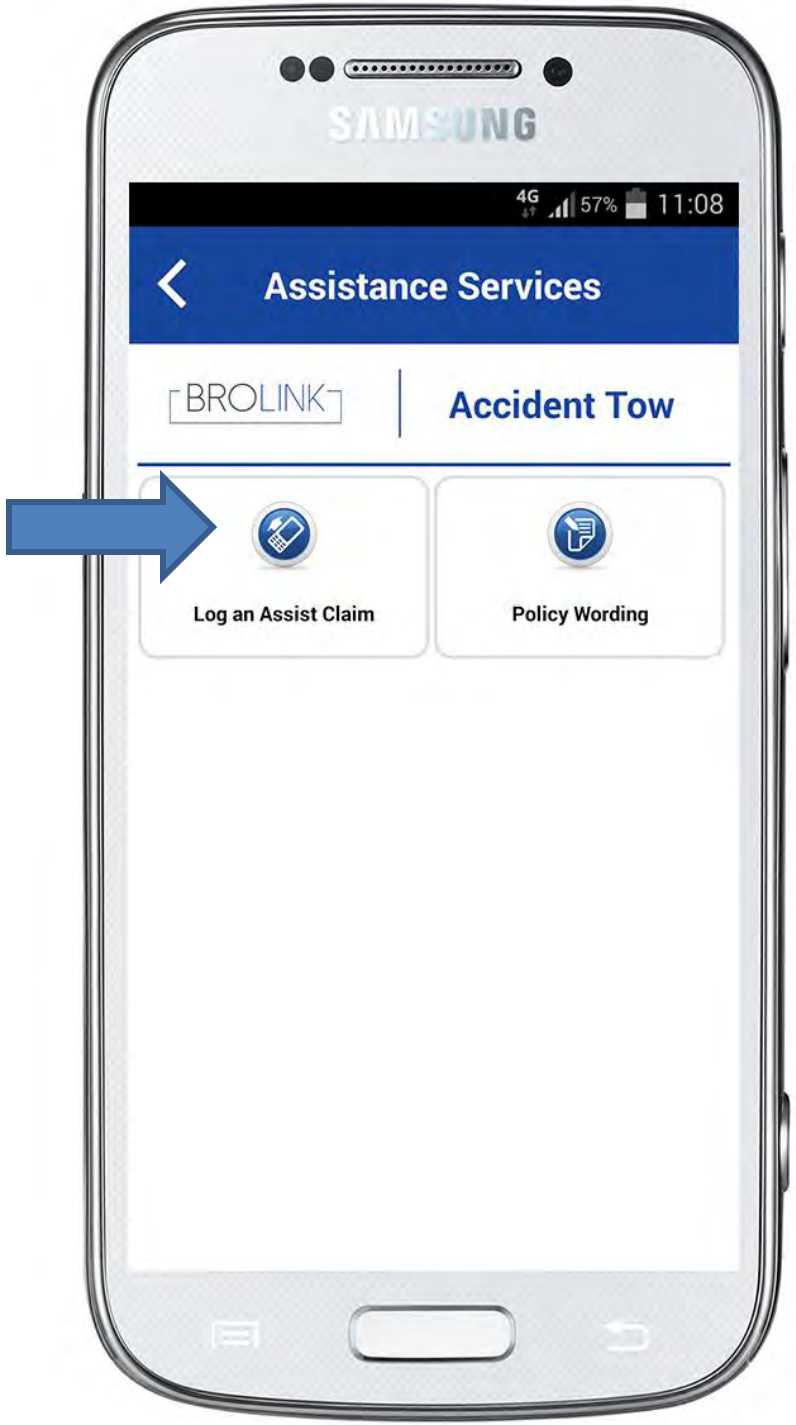
Customer Loyalty Consultants

Selecting a Sub Product:

In this case “Accident Tow”
Once selecting a sub product the client will be able to either:

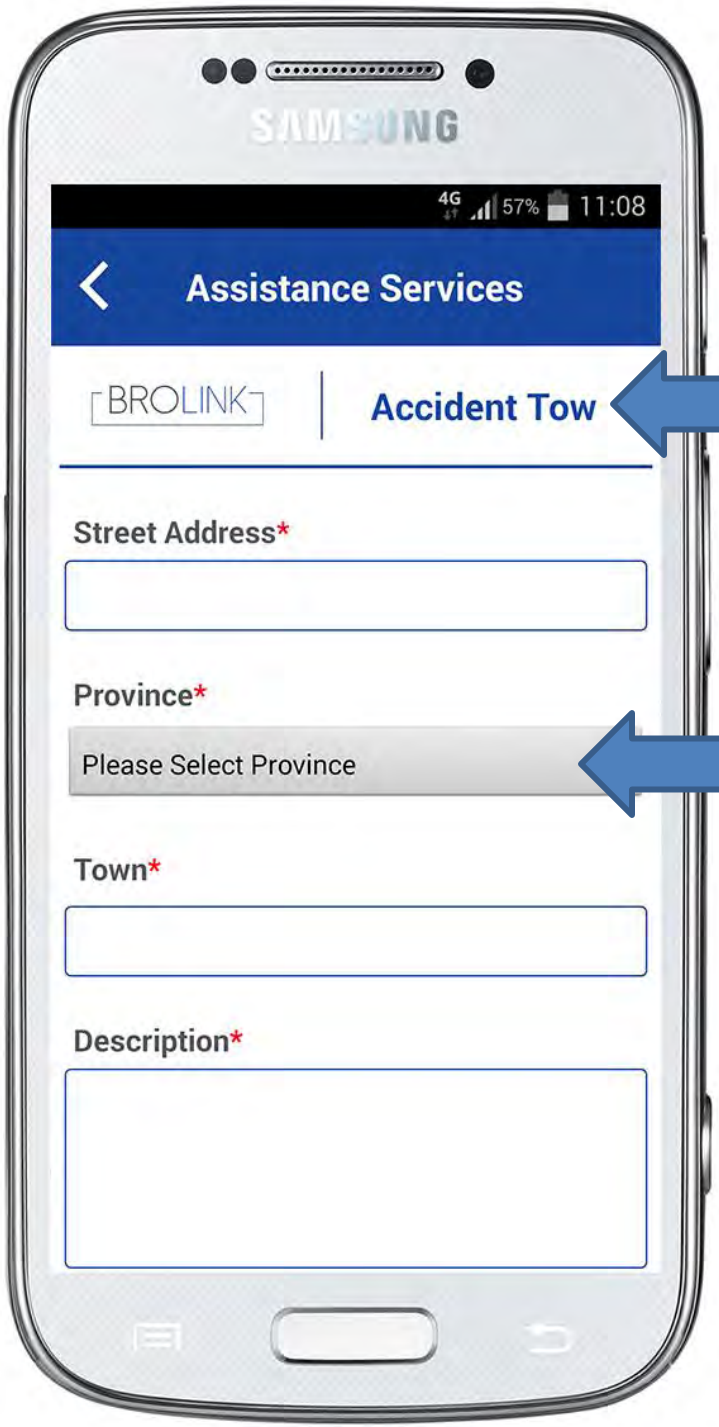
- Log an assistance call
- View policy wording

Customer Loyalty Consultants



Log an Assist Claim

Customer Loyalty Consultants



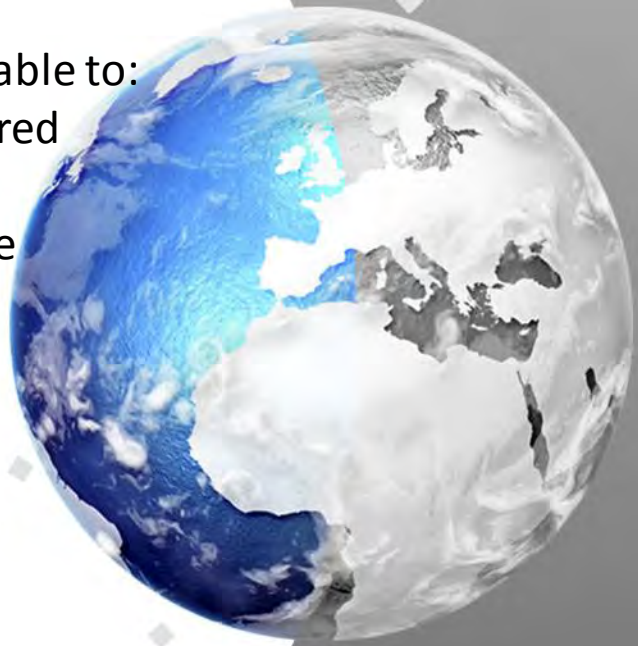
Logging an Assist Claim:

The client will provide essential information such as:

- Street Address
- Province
- Town
- Description

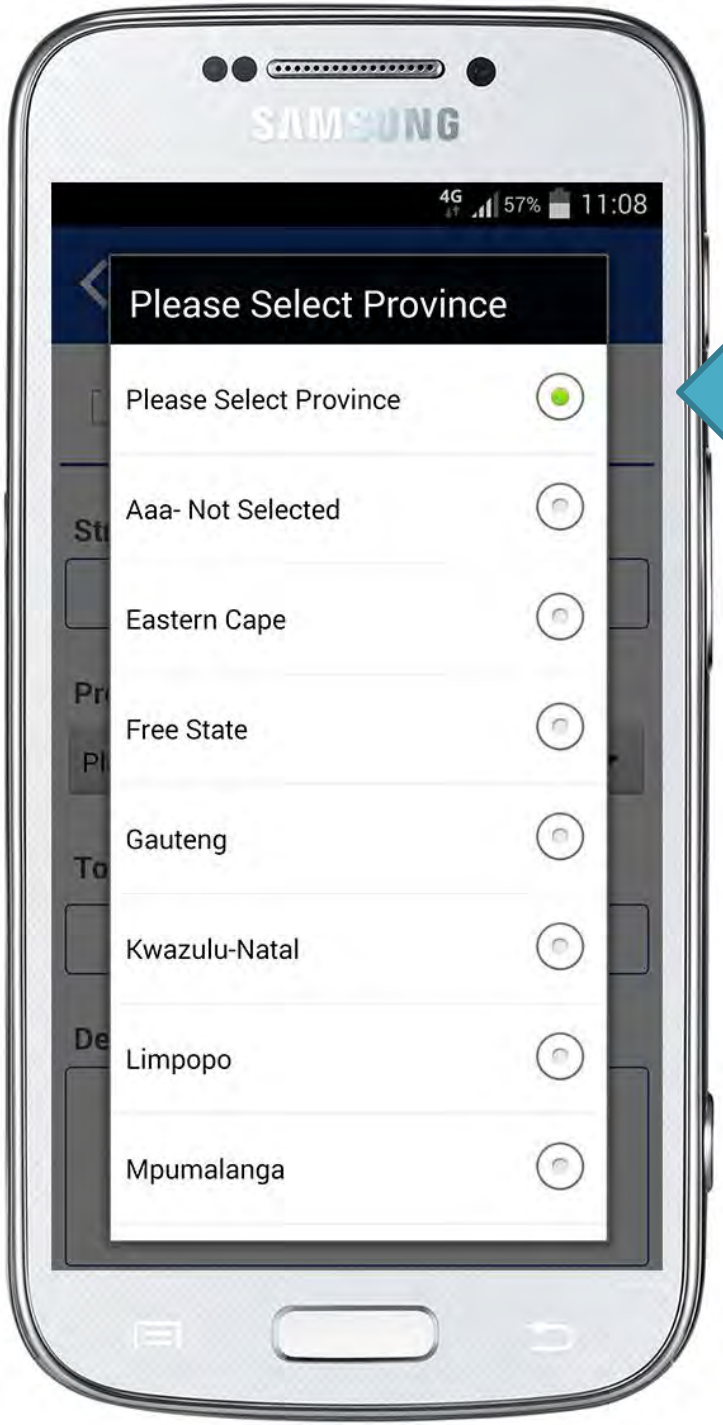
The contact centre will be able to:

- See the assistance required by the client
- Dispatch the appropriate service provider
- Provide the service provider with location, description, vehicle details and colour etc.

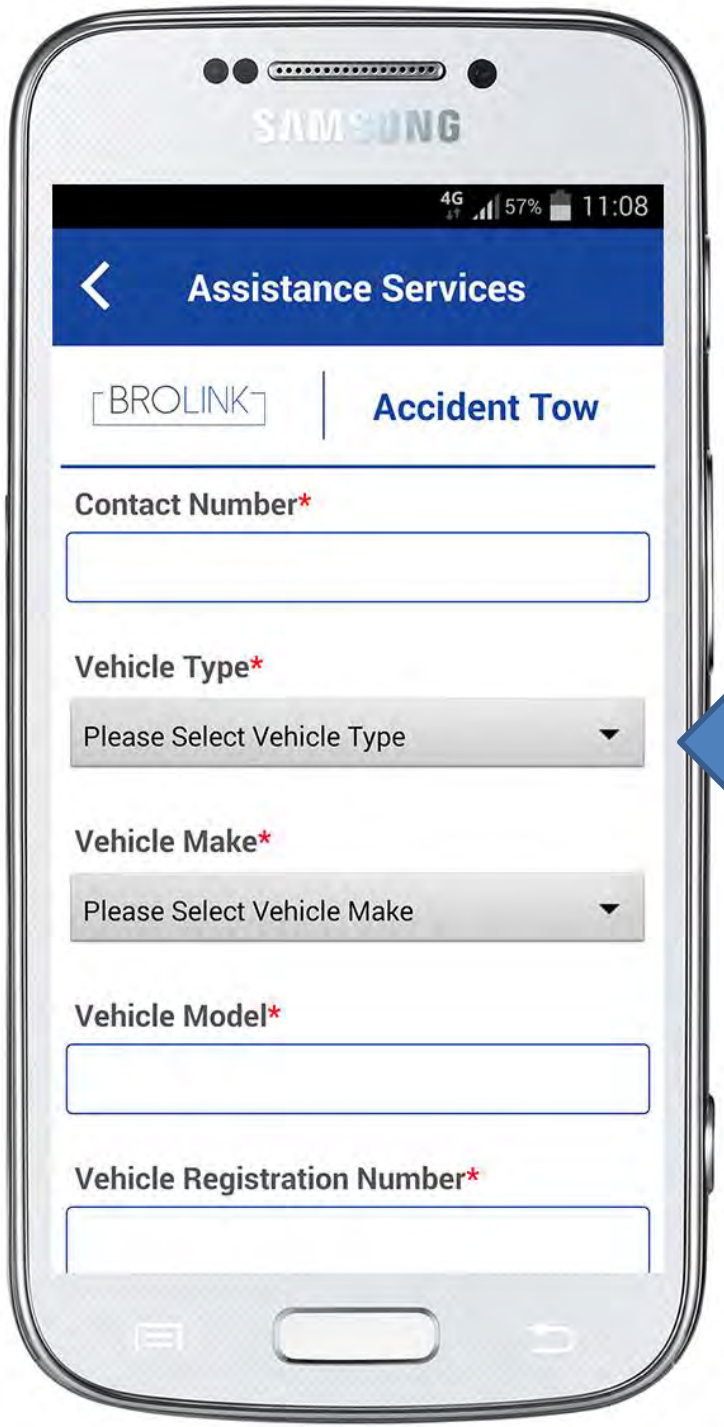


Customer Loyalty Consultants

Logging an Assist Claim
Select a Province



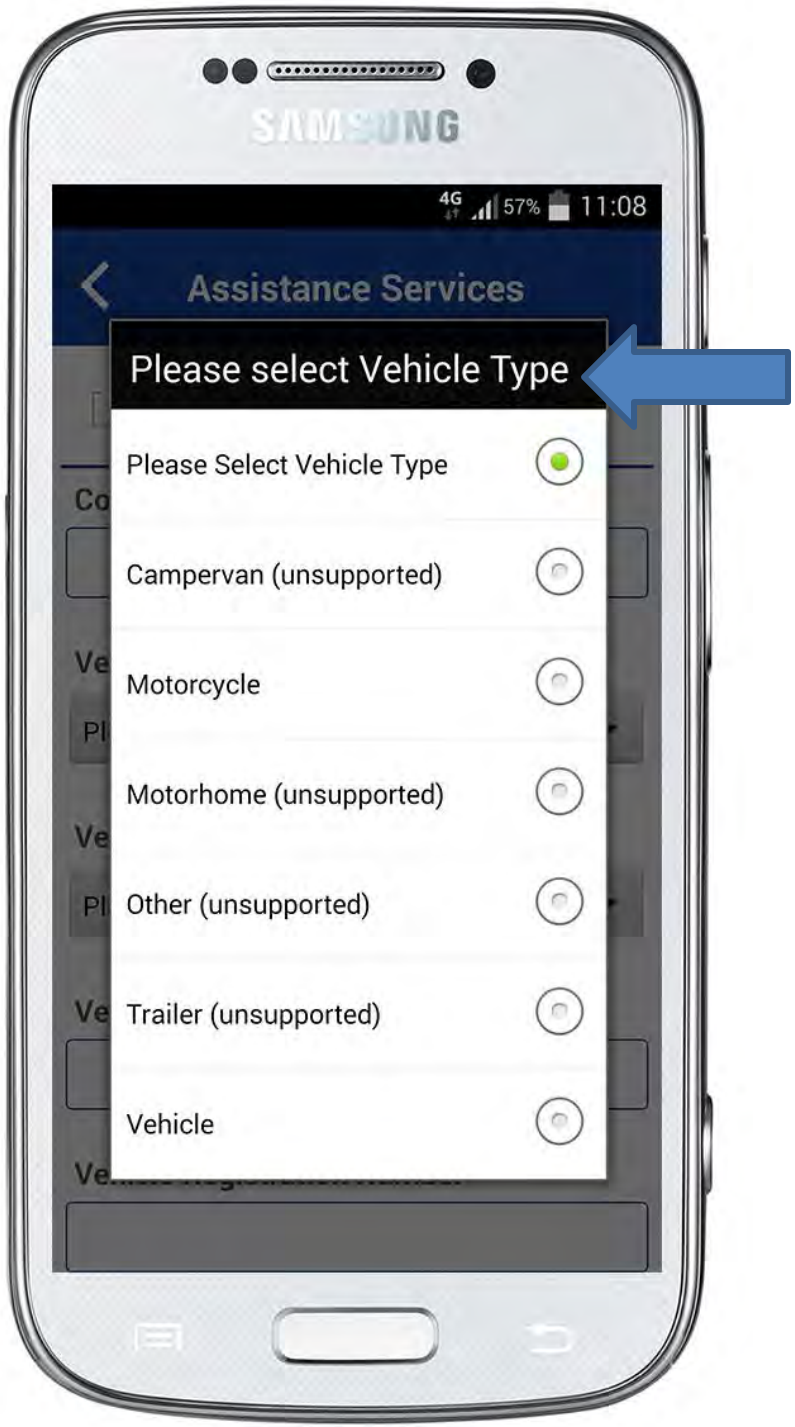
Customer Loyalty Consultants



Logging an Assist Claim:

- Add Contact Number
- Select from dropdown the vehicle type
- Select from dropdown the vehicle make
- Add the vehicle model
- Add the vehicle registration number

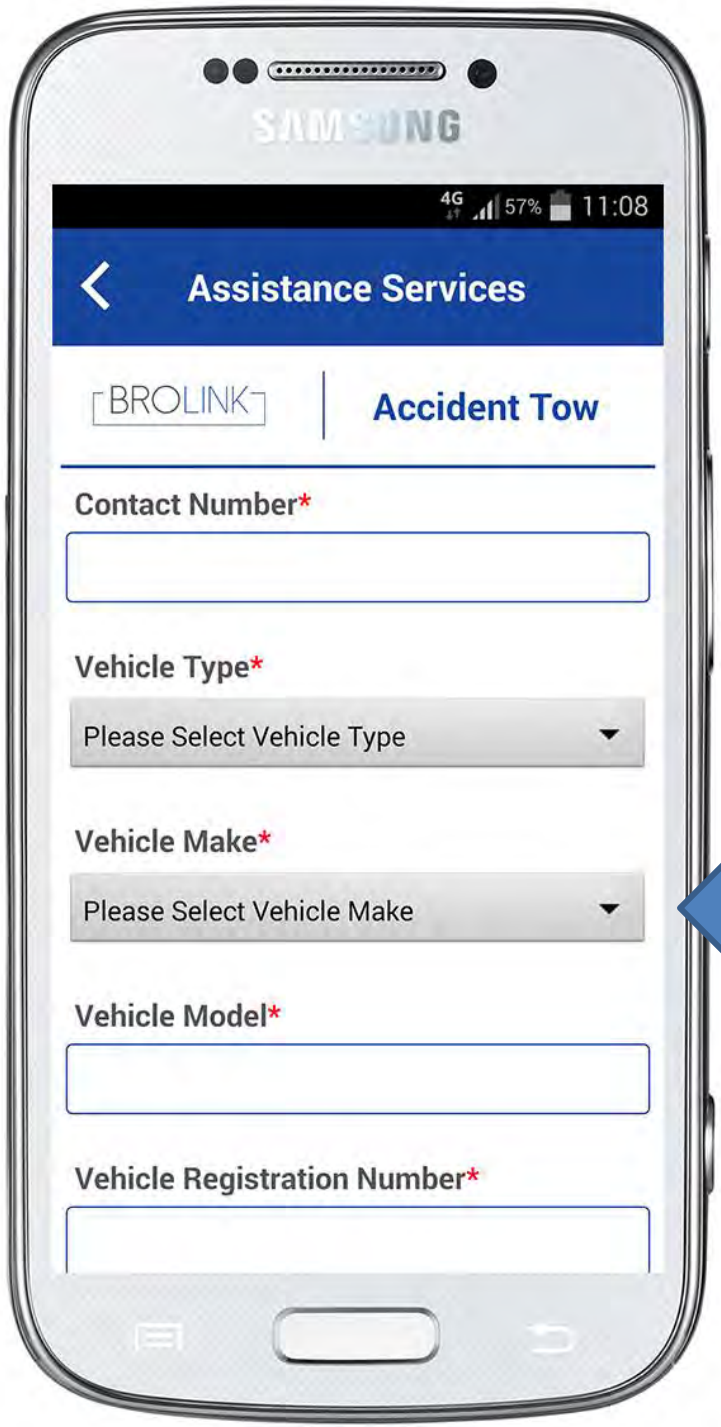
Customer Loyalty Consultants



Logging an Assist Claim:

- Select the vehicle type

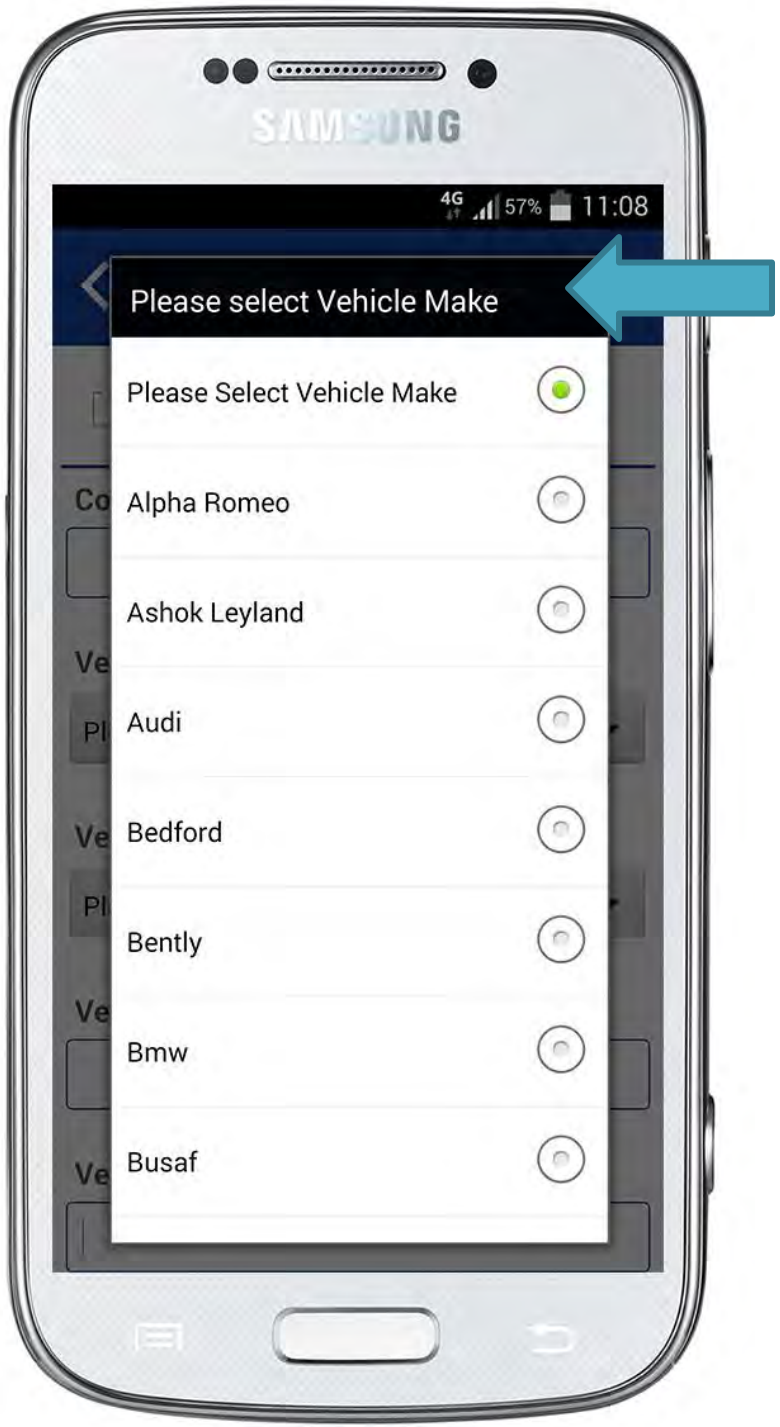
Customer Loyalty Consultants



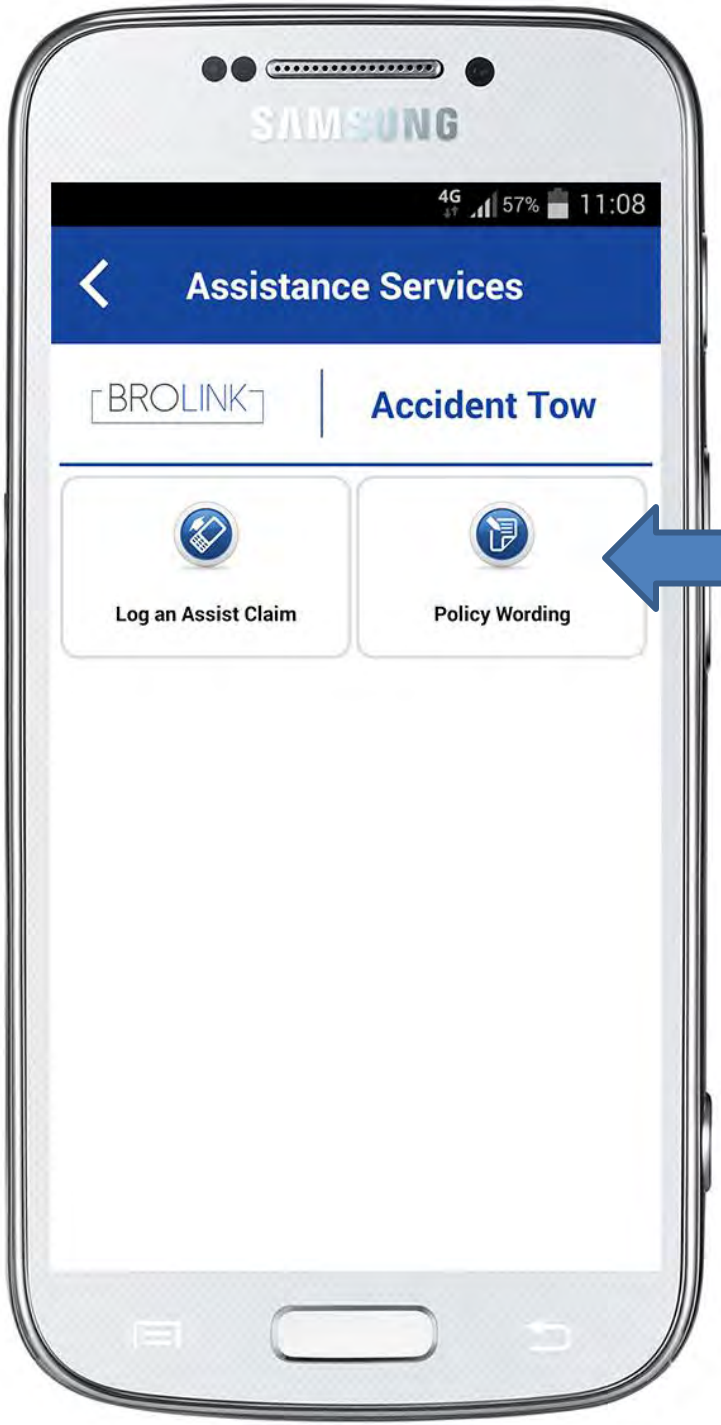
Logging an Assist Claim:

- Select from dropdown the vehicle make

Customer Loyalty Consultants



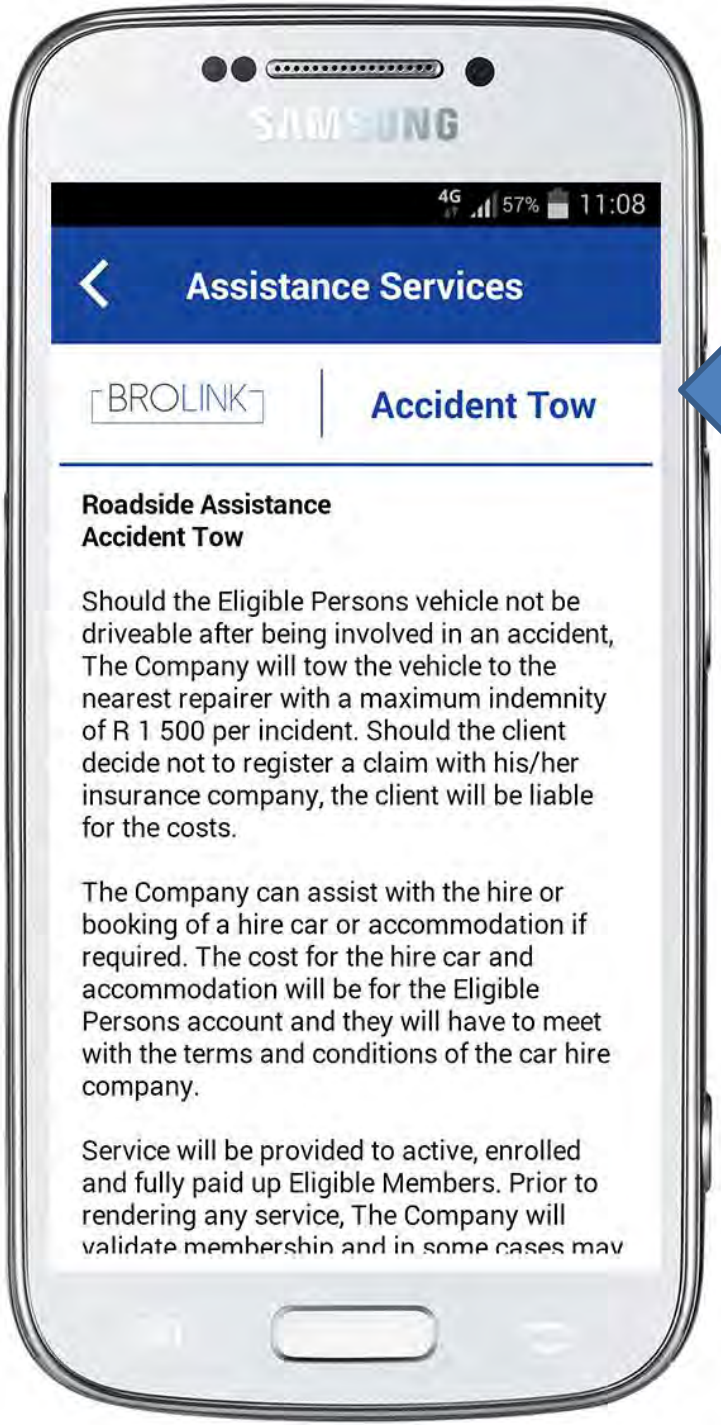
Customer Loyalty Consultants



Policy Wording:

Now the client would know exactly what he/she is covered for.
Every assistance product has this icon.

Customer Loyalty Consultants



Policy Wording:

Detailed summary per product.

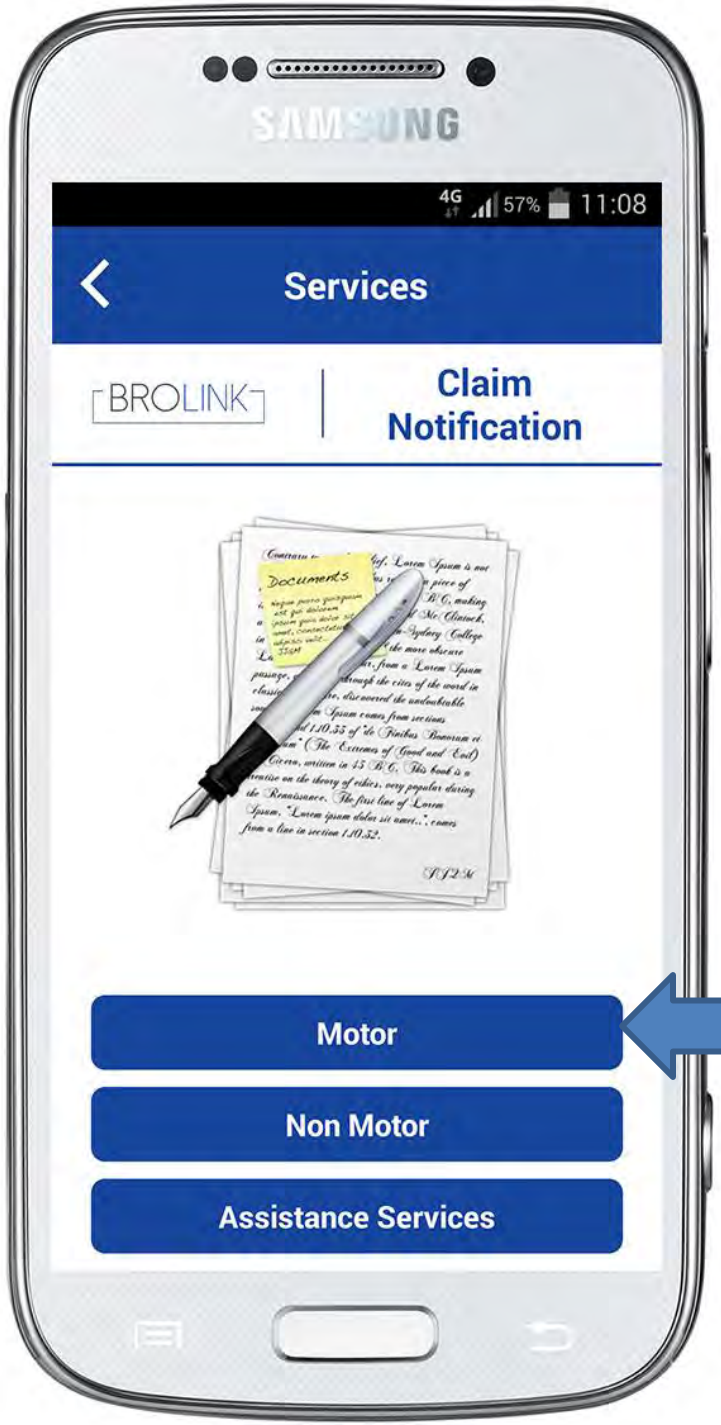
Customer Loyalty Consultants

Claim Notification:

This will provide the client with 3 options:

- Motor
- Non-Motor
- Assistance Services

Customer Loyalty Consultants



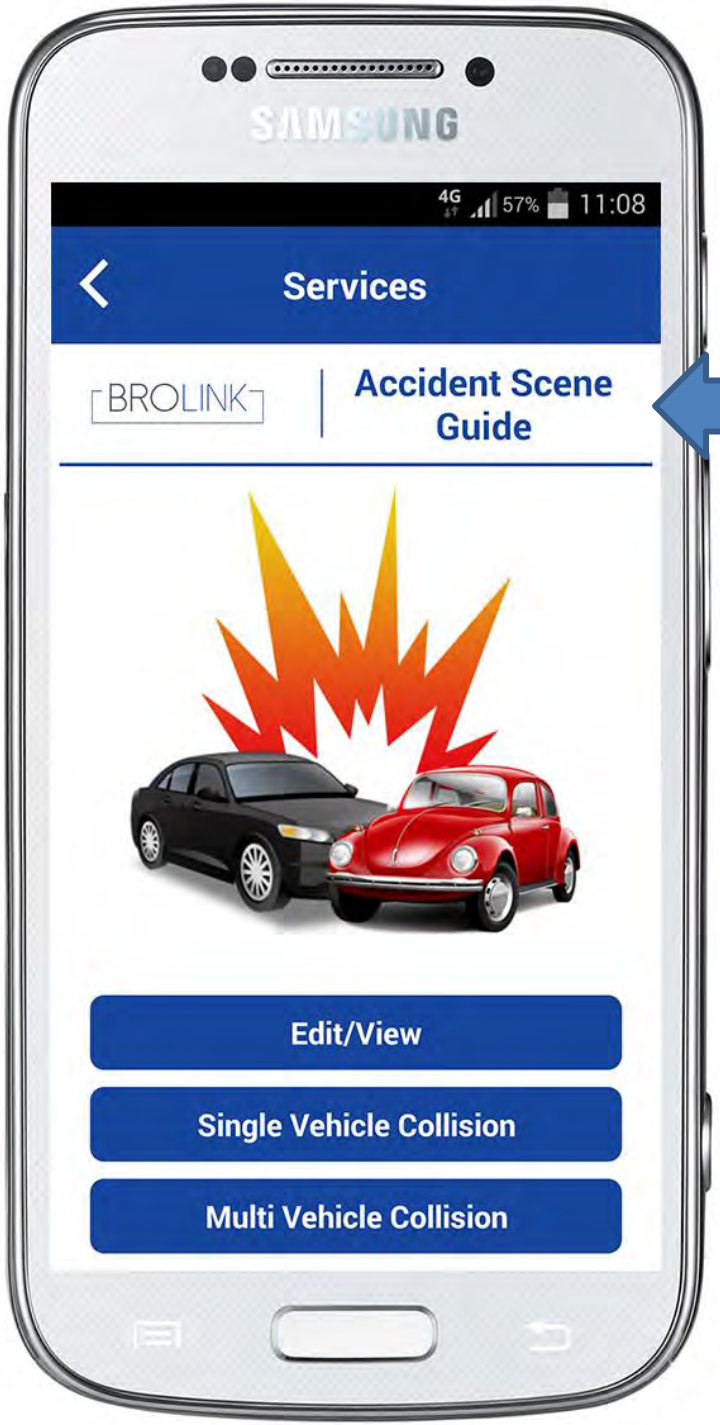
Claim Notification Motor:

This will take the client to the “Accident Scene Guide” (refer to slide 54)

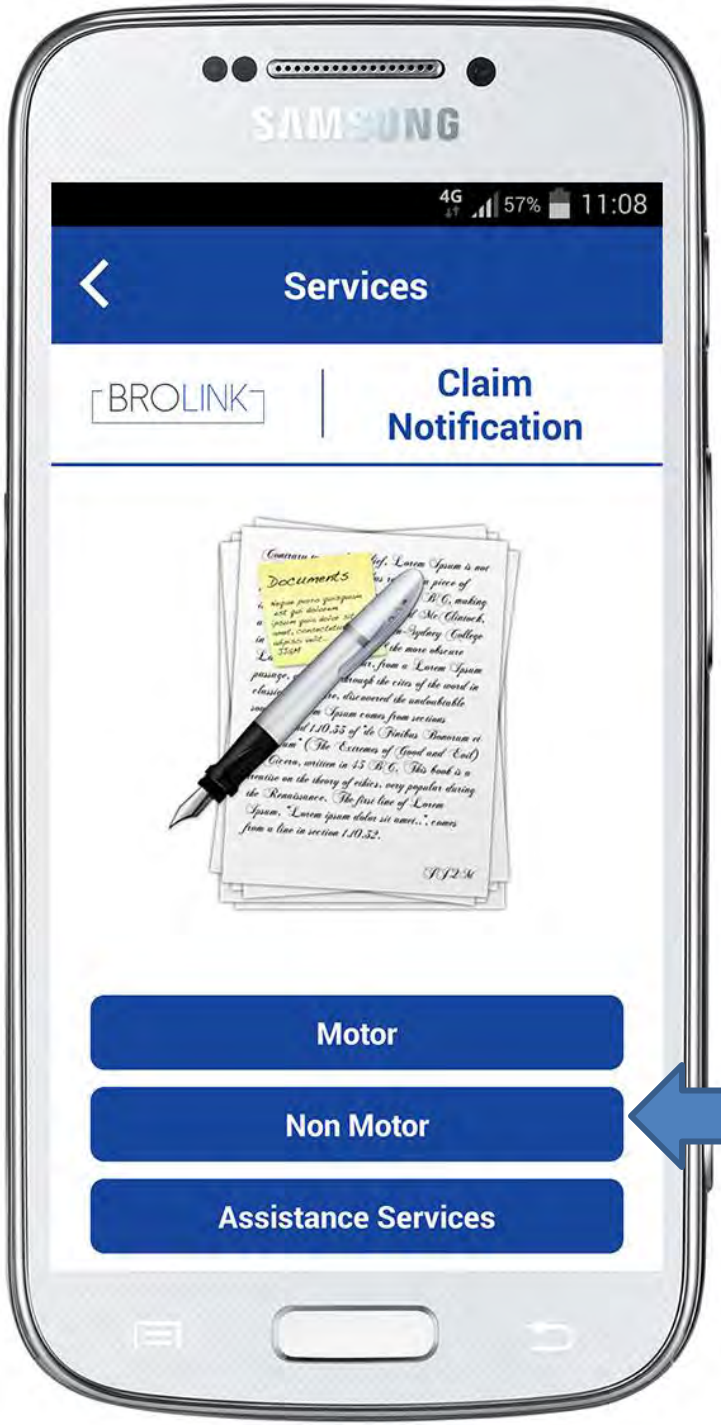
Customer Loyalty Consultants

Claim Notification
Motor

Accident Scene Guide will be discussed shortly.



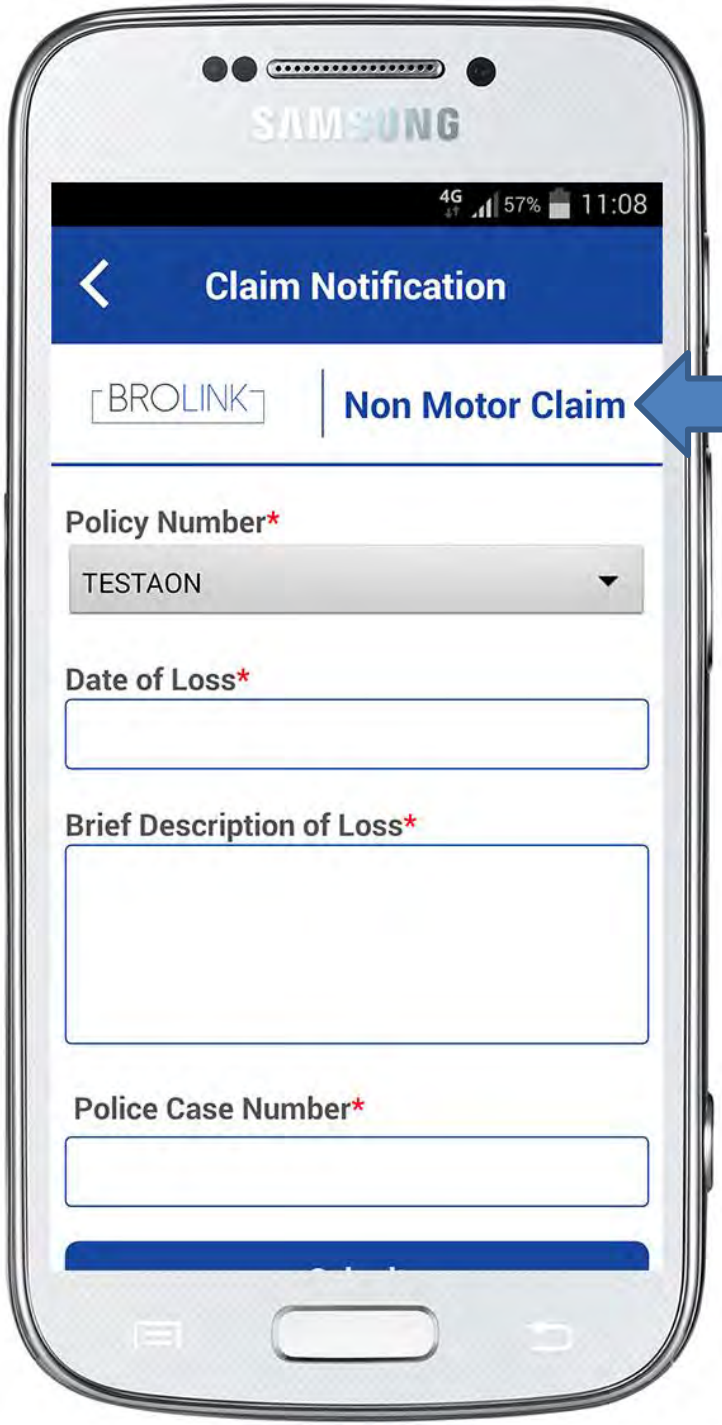
Customer Loyalty Consultants



Non-Motor:

This will provide the client with a “First Notification of Loss” service to provide the Insurer/Scheme with a notification that the client needs to register a claim.

Customer Loyalty Consultants

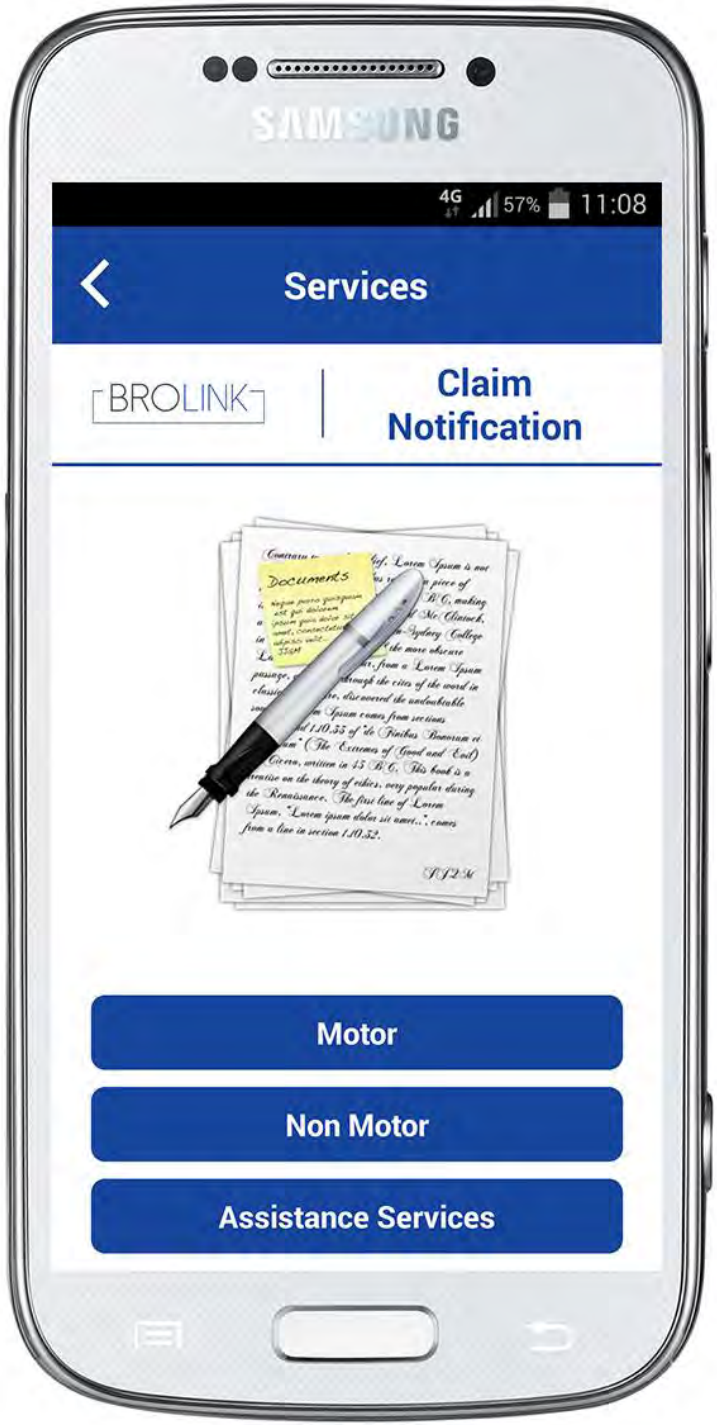


Claim Notification
Non Motor Claim

- Select Policy number (If there is more than 1 policy number for this client)
- Enter date of loss
- Enter brief description of loss
- Enter police case number if available

Click on “Submit”

Customer Loyalty Consultants



Claim Notification Assistance Services:

This will take the client back to the Assistance Services options

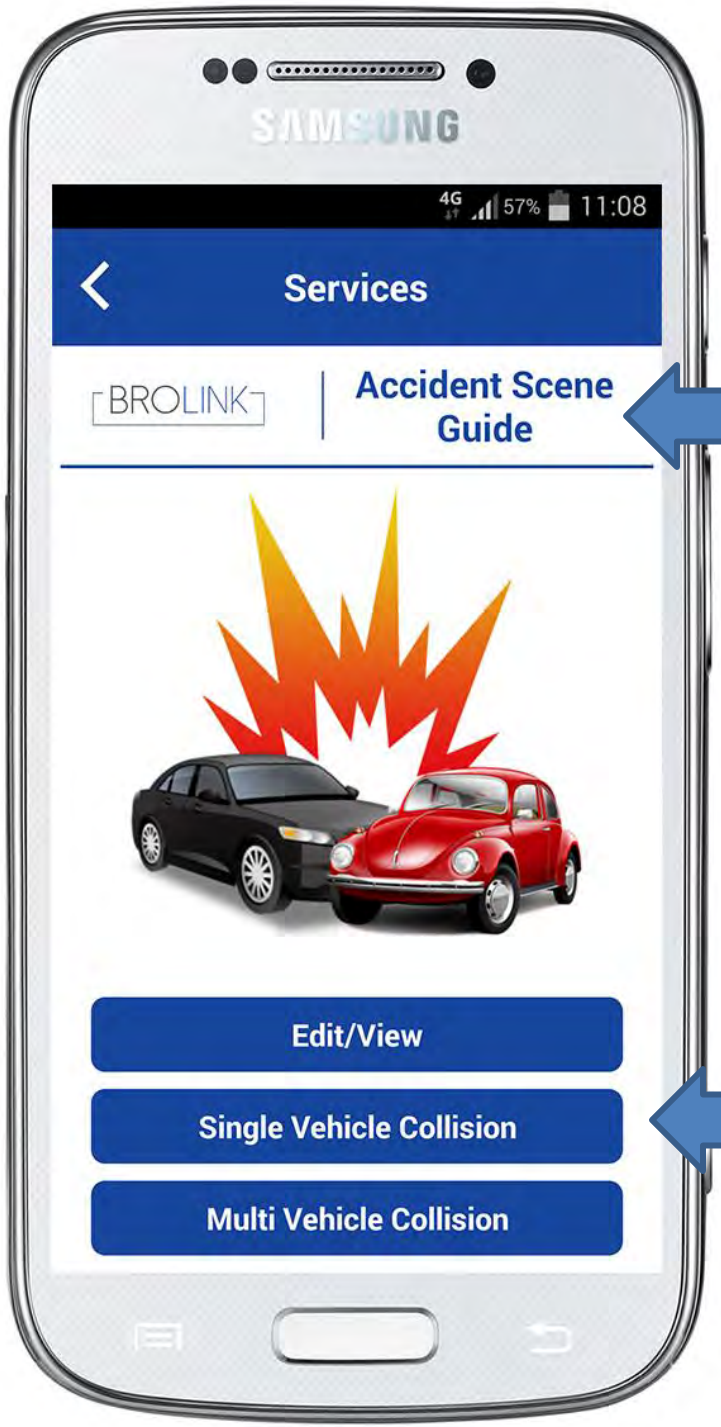
Customer Loyalty Consultants

Customer Loyalty Consultants

Accident Scene Guide:

A step by step guide to assist the client in collecting crucial information at the scene of an accident.

Customer Loyalty Consultants

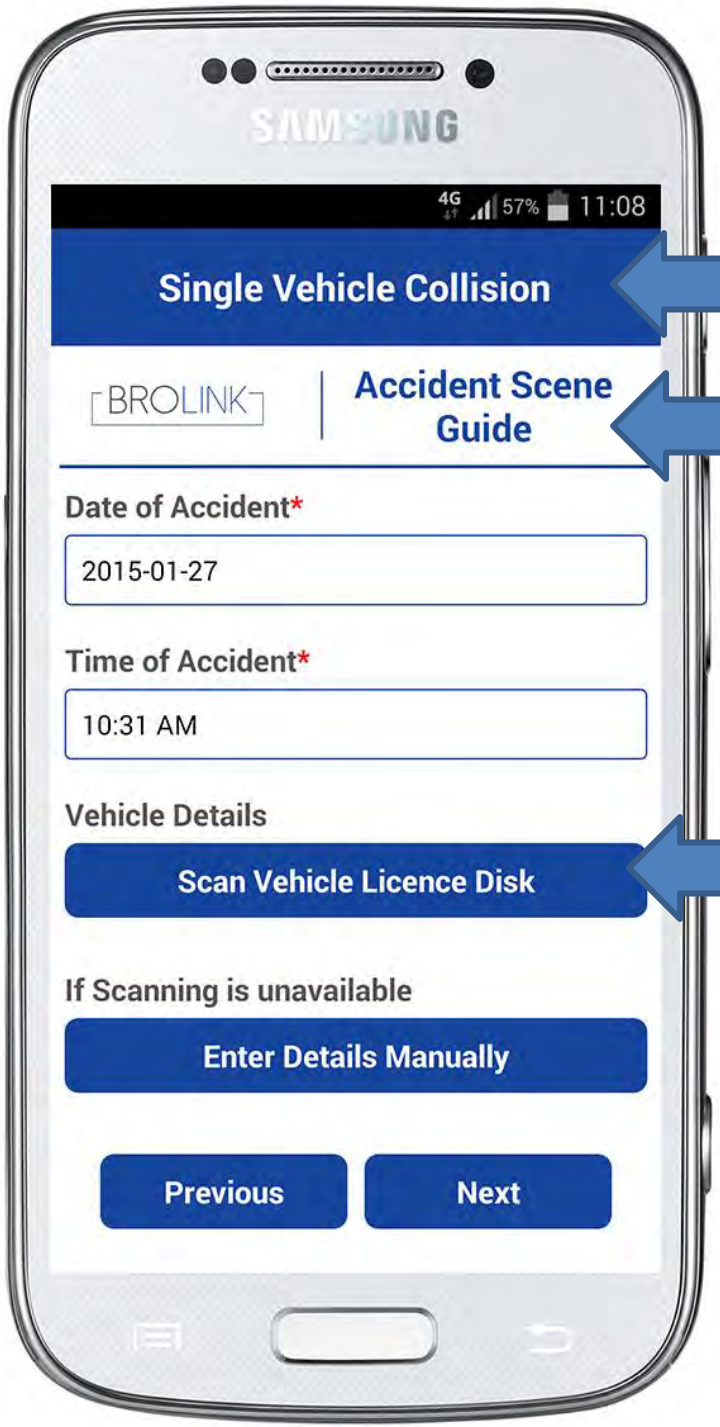


Accident Scene Guide:

The following options will be available:

- Edit/View
- Single Vehicle Collision
- Multi Vehicle Collision

Customer Loyalty Consultants



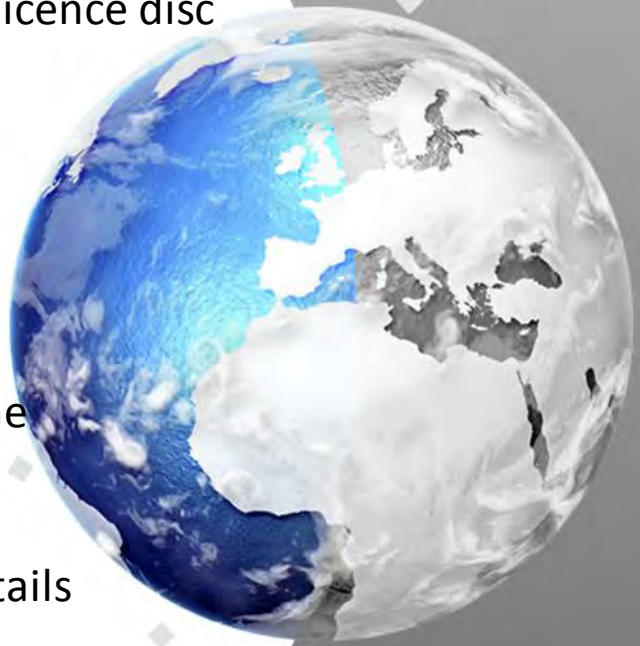
Accident Scene Guide
Single Vehicle Collision:

- Date & time of the accident (it will automatically use the current date and time, but can be changed manually)

Click on "Scan Vehicle licence disc" this will take you to the licence disc scanner.

- Scanning the vehicle license disc takes the hassle out of writing down the vehicle description, colour, registration no, engine and chassis no.
  If you cannot scan, you can enter the details manually

Click on "next"

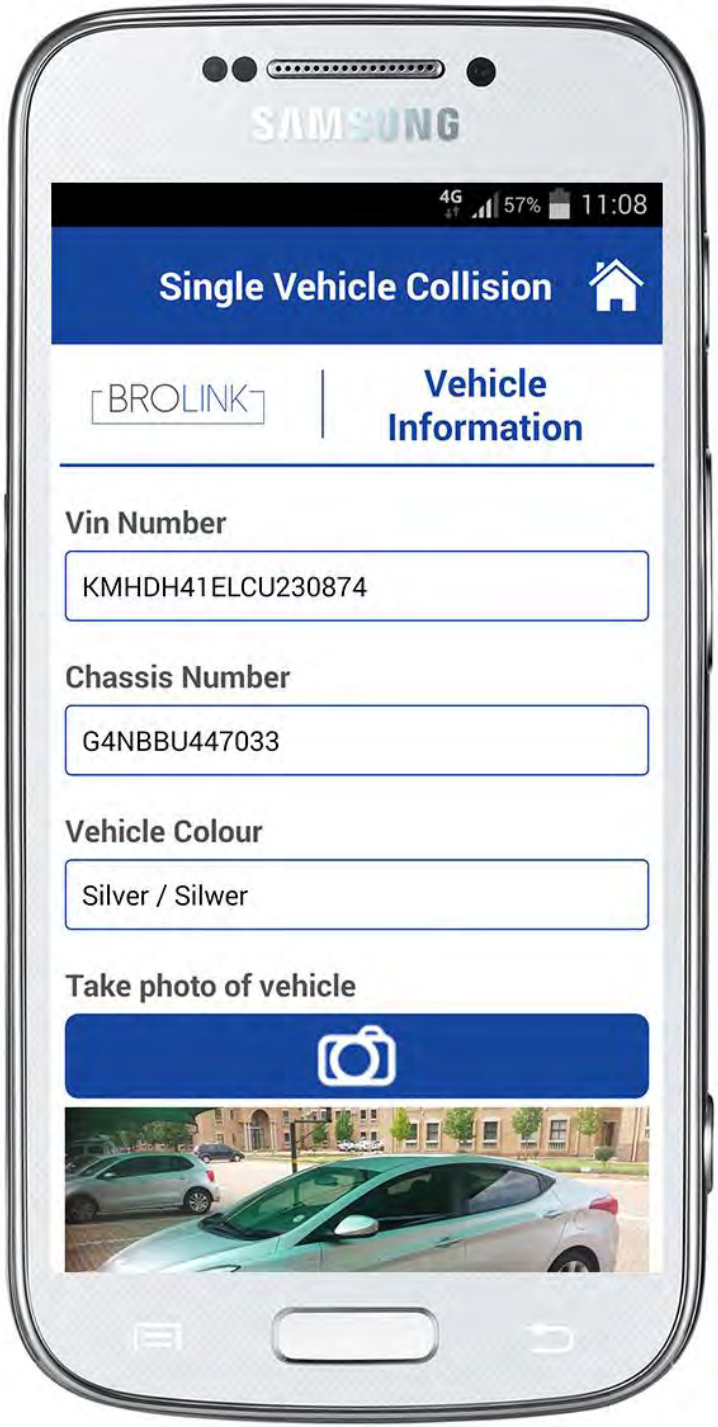


Customer Loyalty Consultants

Accident Scene Guide
Single Vehicle Collision:

This information will return after the scanning.

Customer Loyalty Consultants



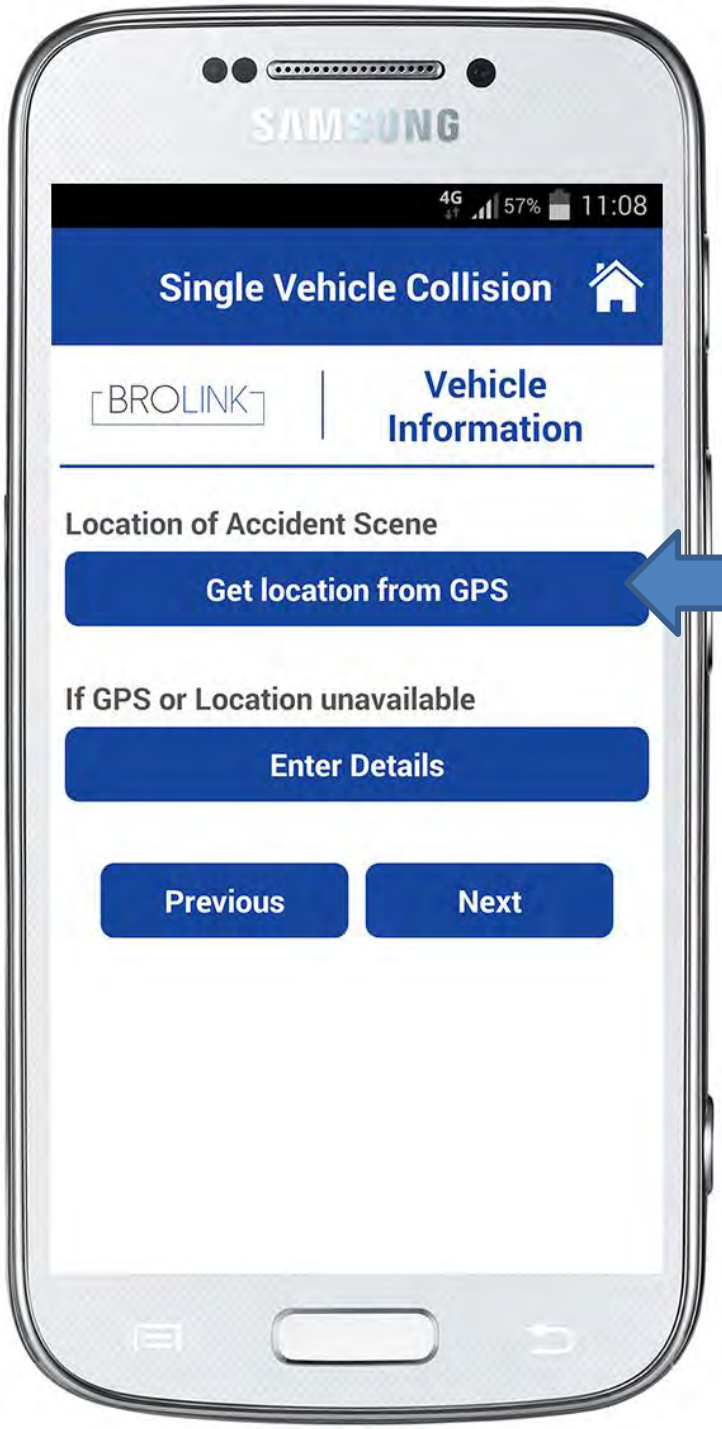
Accident Scene Guide
Single Vehicle Collision:

This information will return after the scanning.

Take photo of the vehicle

This automatically opens in your phone's camera.

Customer Loyalty Consultants



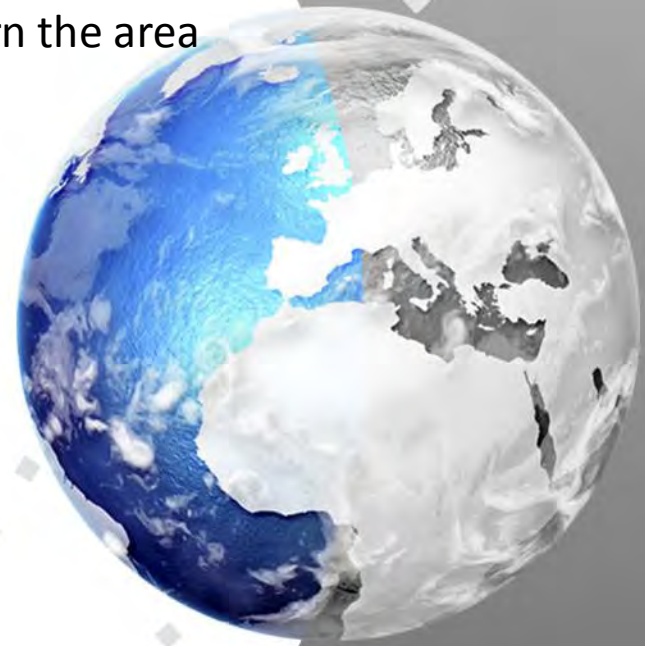
Accident Scene Guide
Single Vehicle Collision:

GPS Location:

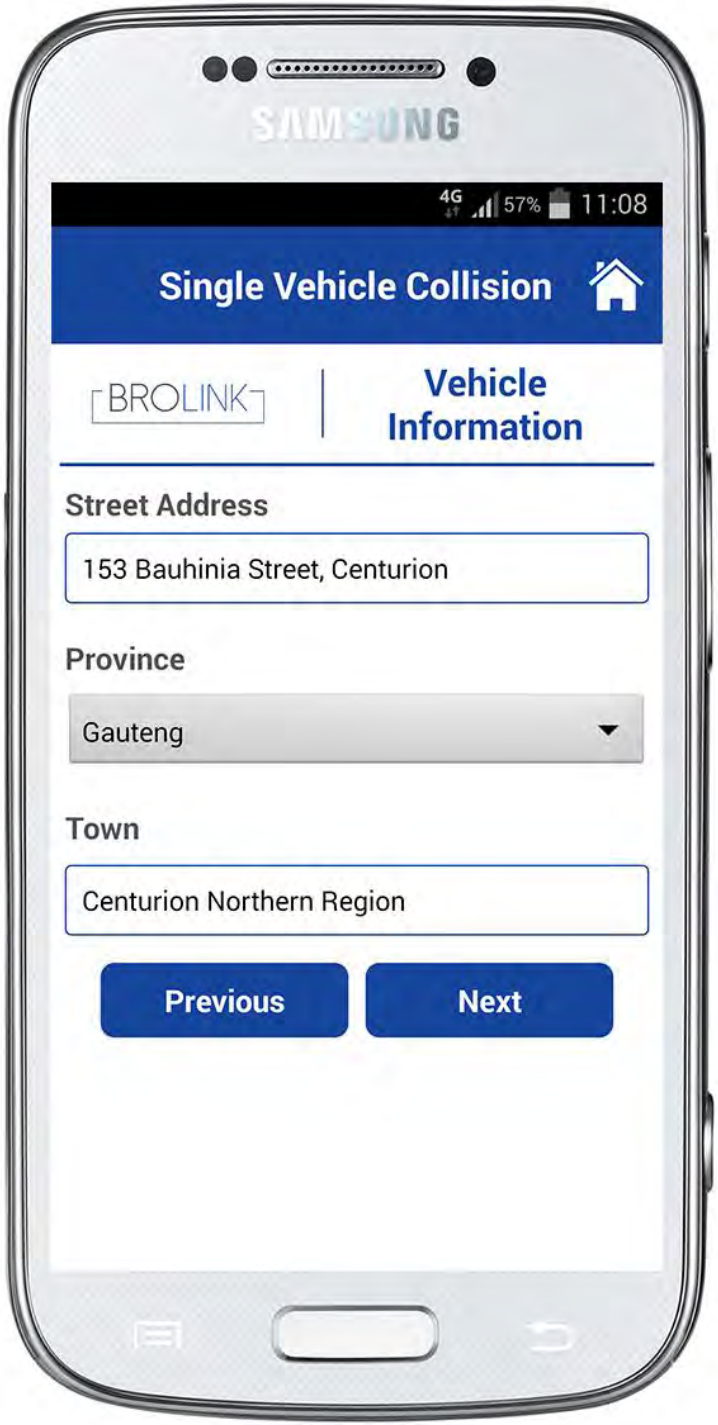
If the client is on the scene where the accident happened they would be able to use the phones GPS to get the exact location.

By clicking on “Get location from GPS” this will automatically return the area details that the client is in.

Click on “next”



Customer Loyalty Consultants

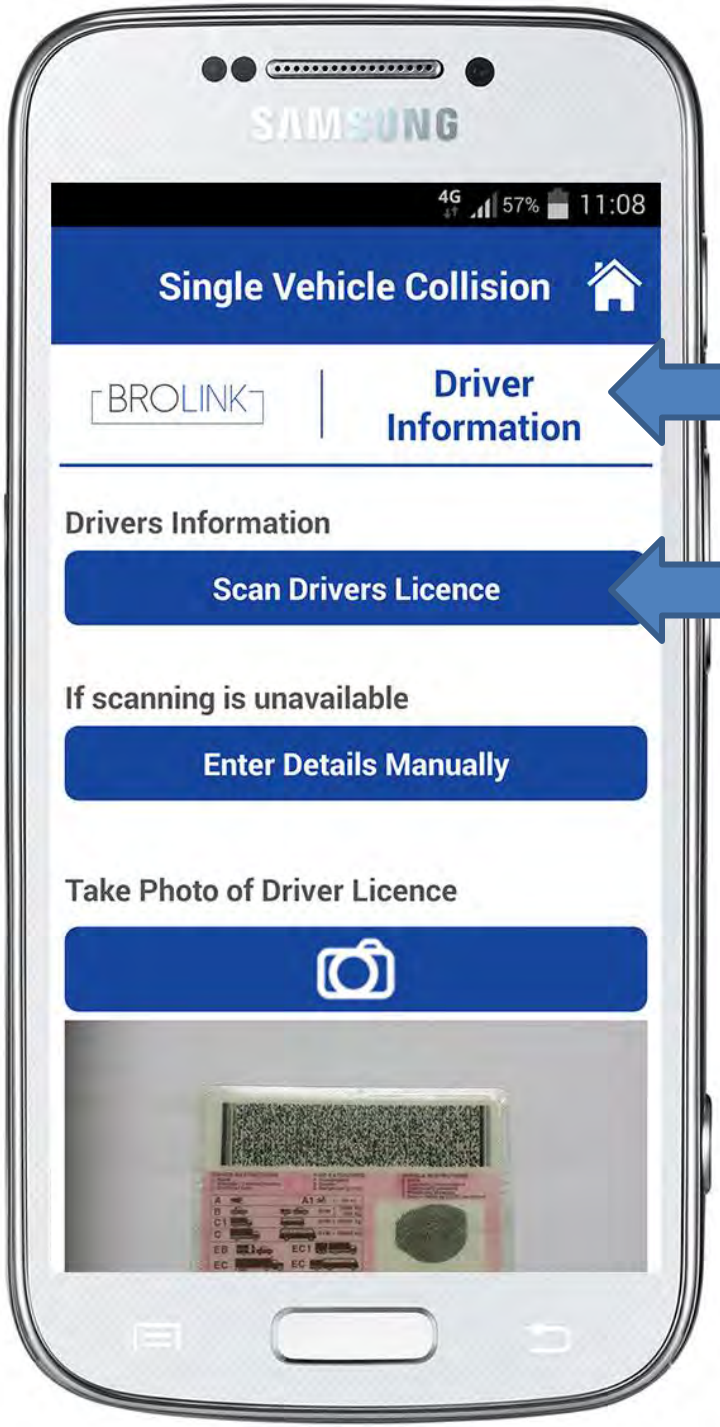


Accident Scene Guide
Single Vehicle Collision:

This information will return after clicking on “Get GPS location”

Click on “next”

Customer Loyalty Consultants



Accident Scene Guide
Single Vehicle Collision:

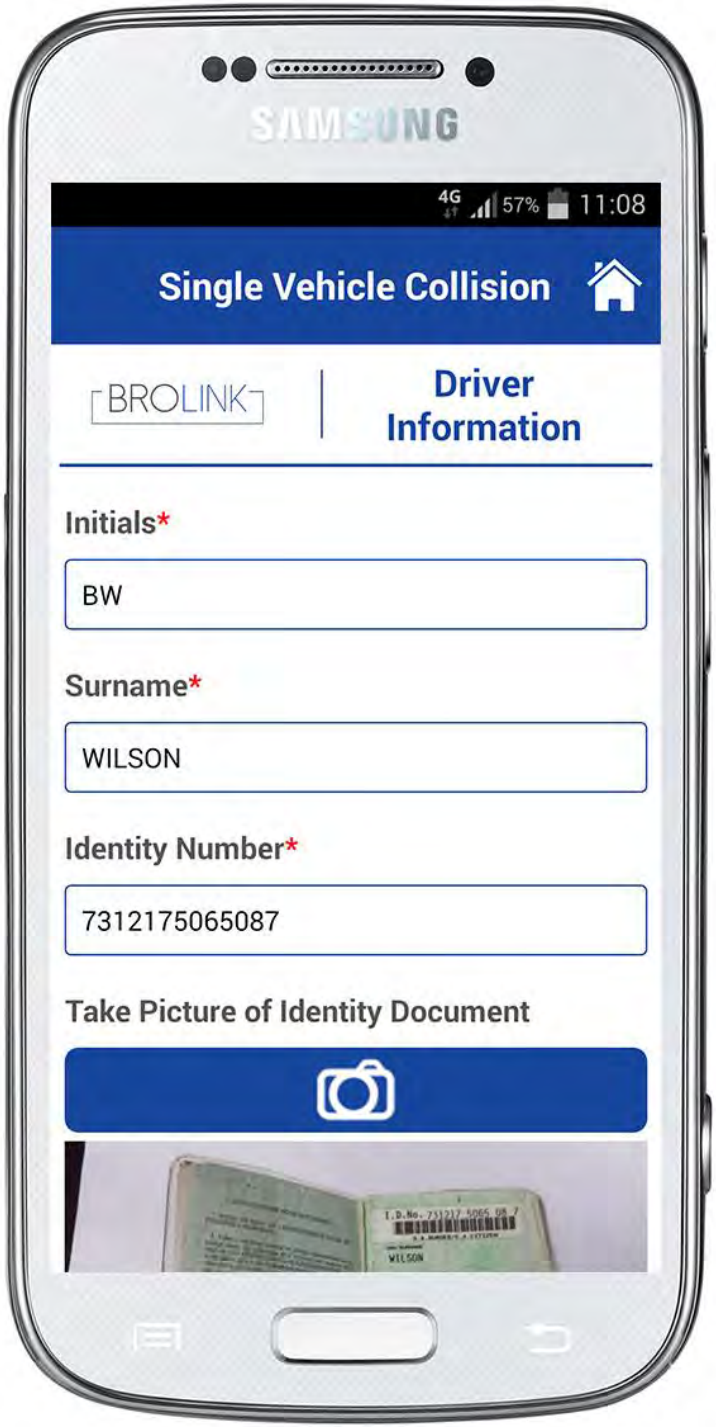
Driver Information:

Click on “Scan Drivers Licence” This will take you to the licence scanner, scan the barcode of the drivers license, this will return the information of the driver such as:

- Initials
- Surname
- ID Number

Take a photo of the drivers licence.

Customer Loyalty Consultants



Accident Scene Guide
Single Vehicle Collision:

Driver Information:

This will return the following information of the driver such as:

- Initials
- Surname
- ID Number

Take a photo of identity document.

Customer Loyalty Consultants

Accident Scene Guide
Single Vehicle Collision:

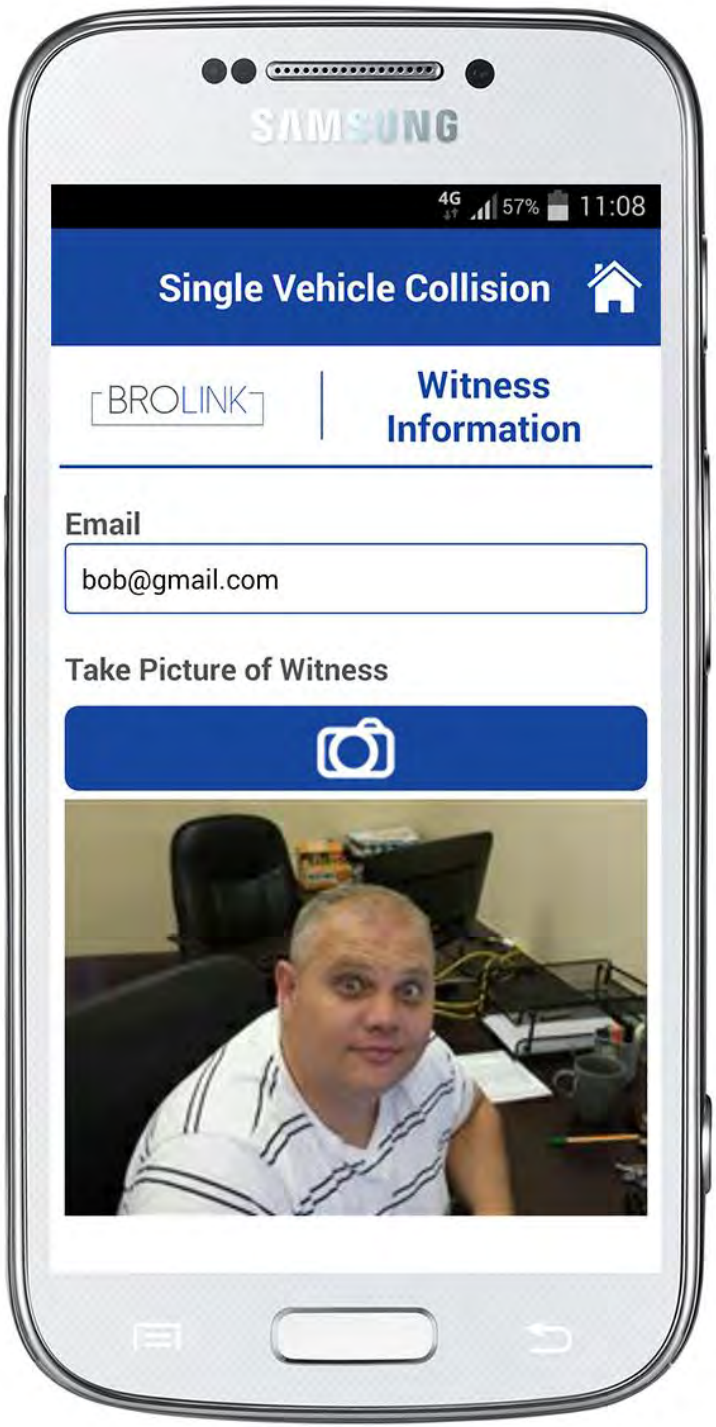
Witness Information:

Collect witness information if available (manually enter details)

- Name
- Surname
- Identity Number
- Contact Number

Click on “next”

Customer Loyalty Consultants



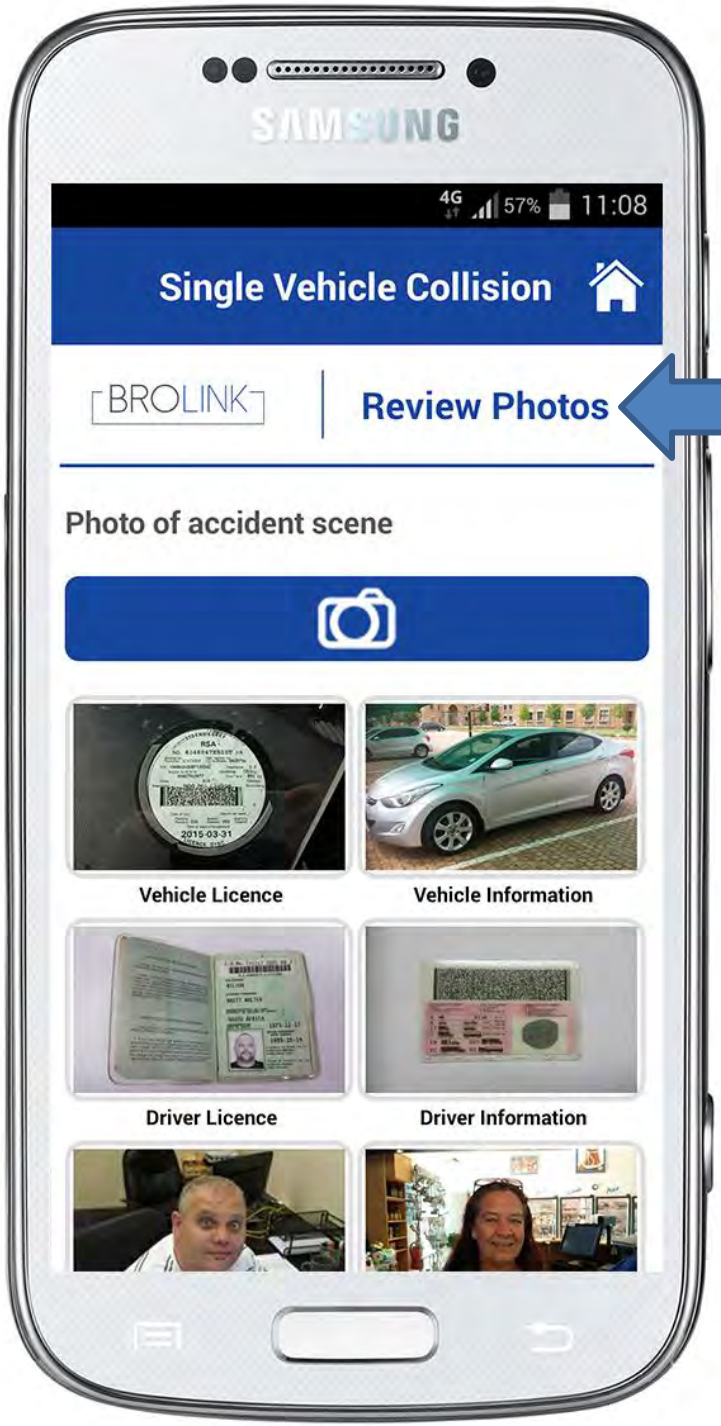
Accident Scene Guide
Single Vehicle Collision:

Witness Information:

- Enter email address
- Take picture of witness

You would be able to load more than 1 witness.

Customer Loyalty Consultants

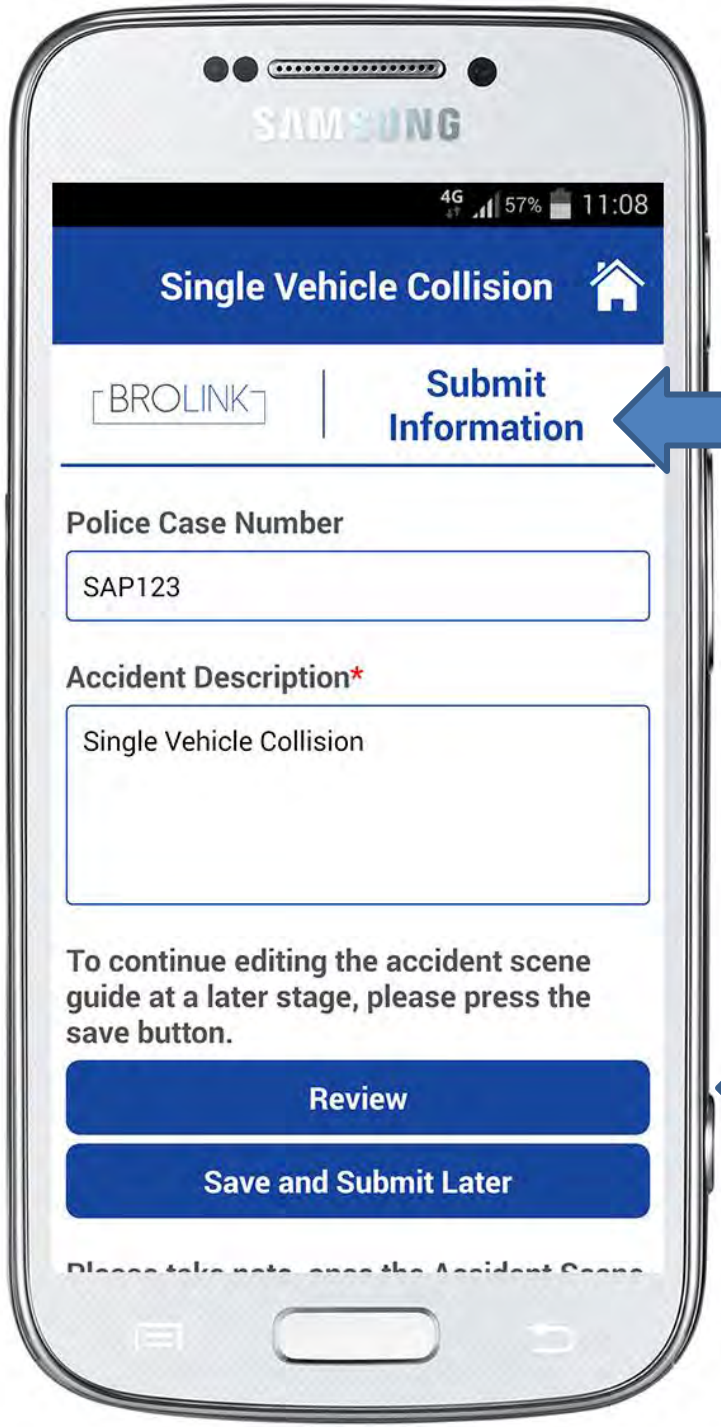


Accident Scene Guide
Single Vehicle Collision:

Review Photos:

This provides the client with the summary of photos uploaded throughout the process

Customer Loyalty Consultants

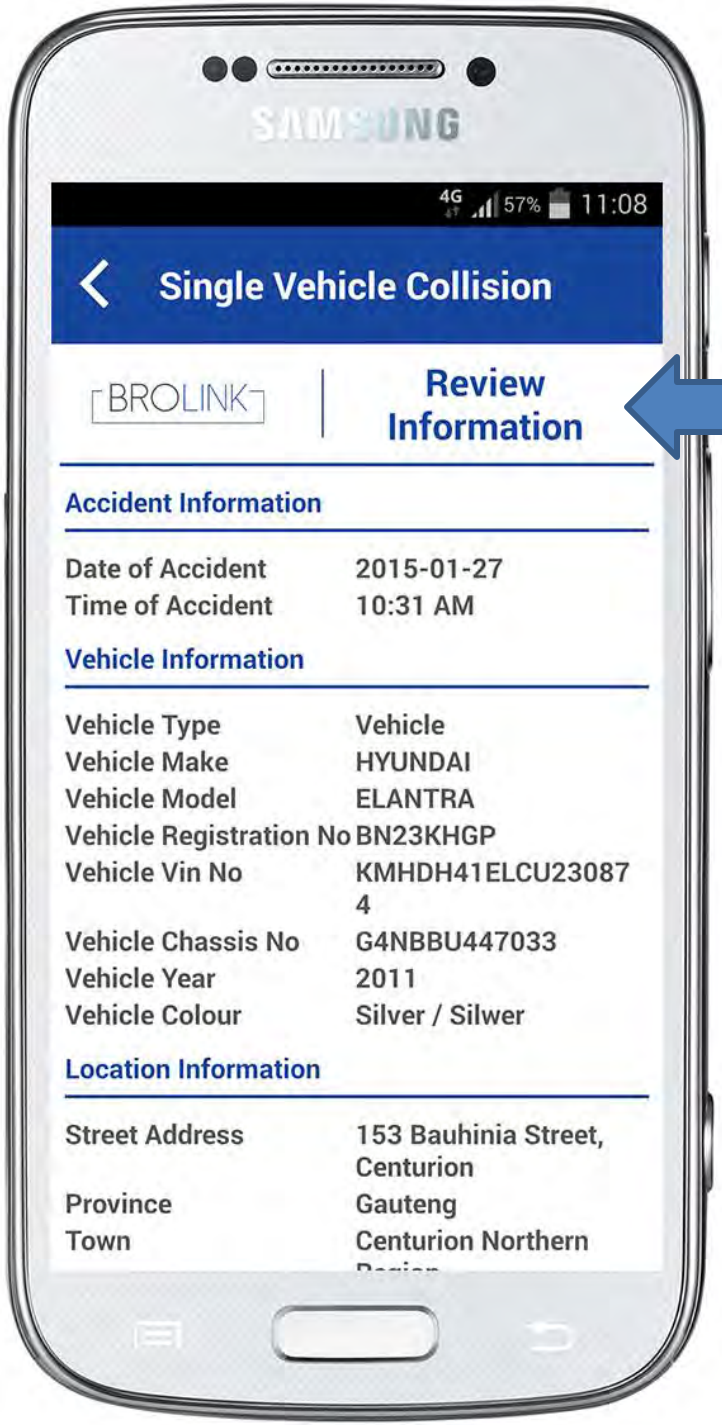


Accident Scene Guide
Single Vehicle Collision:

Submit Information

Add police case number if available and add description of the accident.

Customer Loyalty Consultants

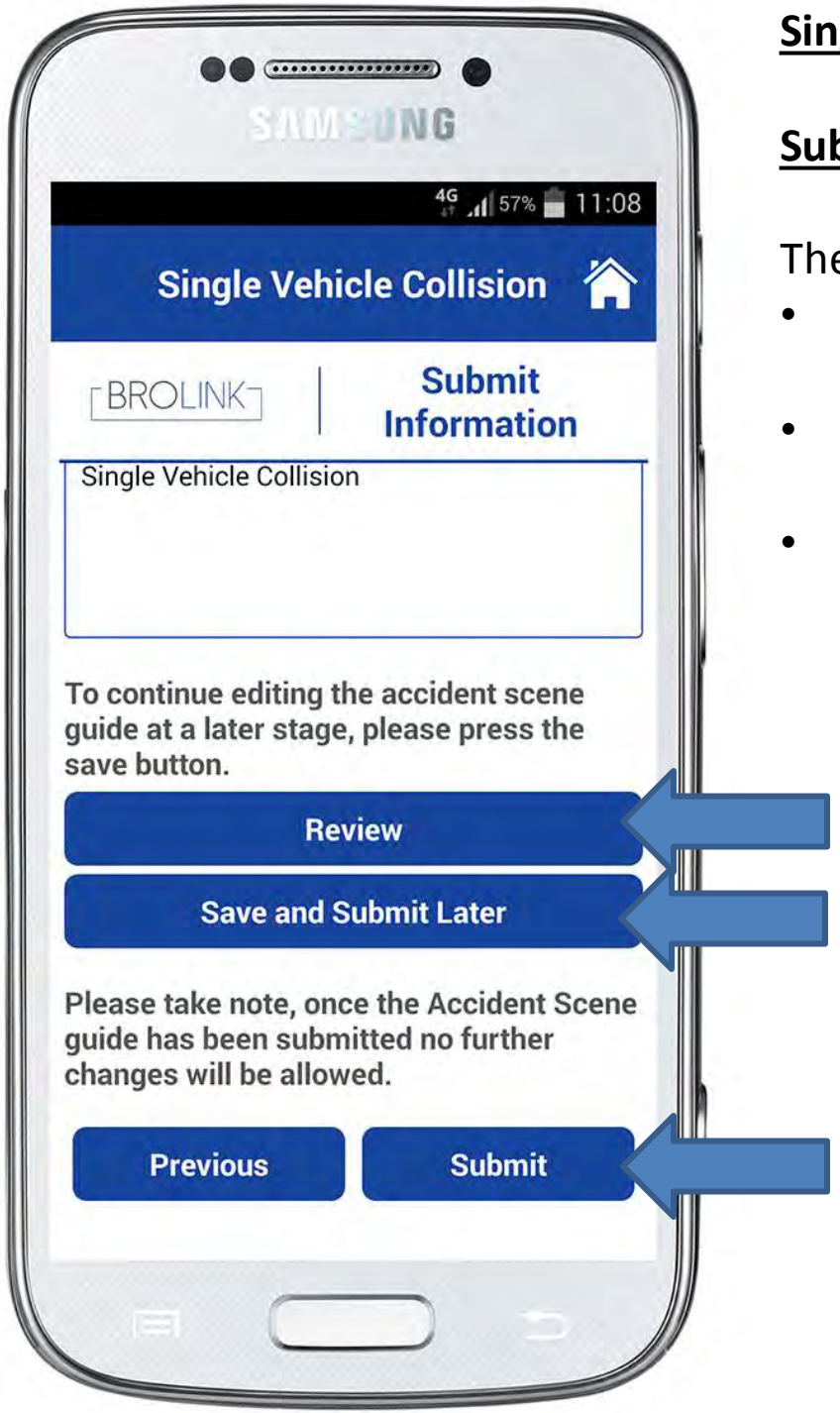


Accident Scene Guide
Single Vehicle Collision:

Review Information

This will show a summary of the information entered throughout the process.

Customer Loyalty Consultants



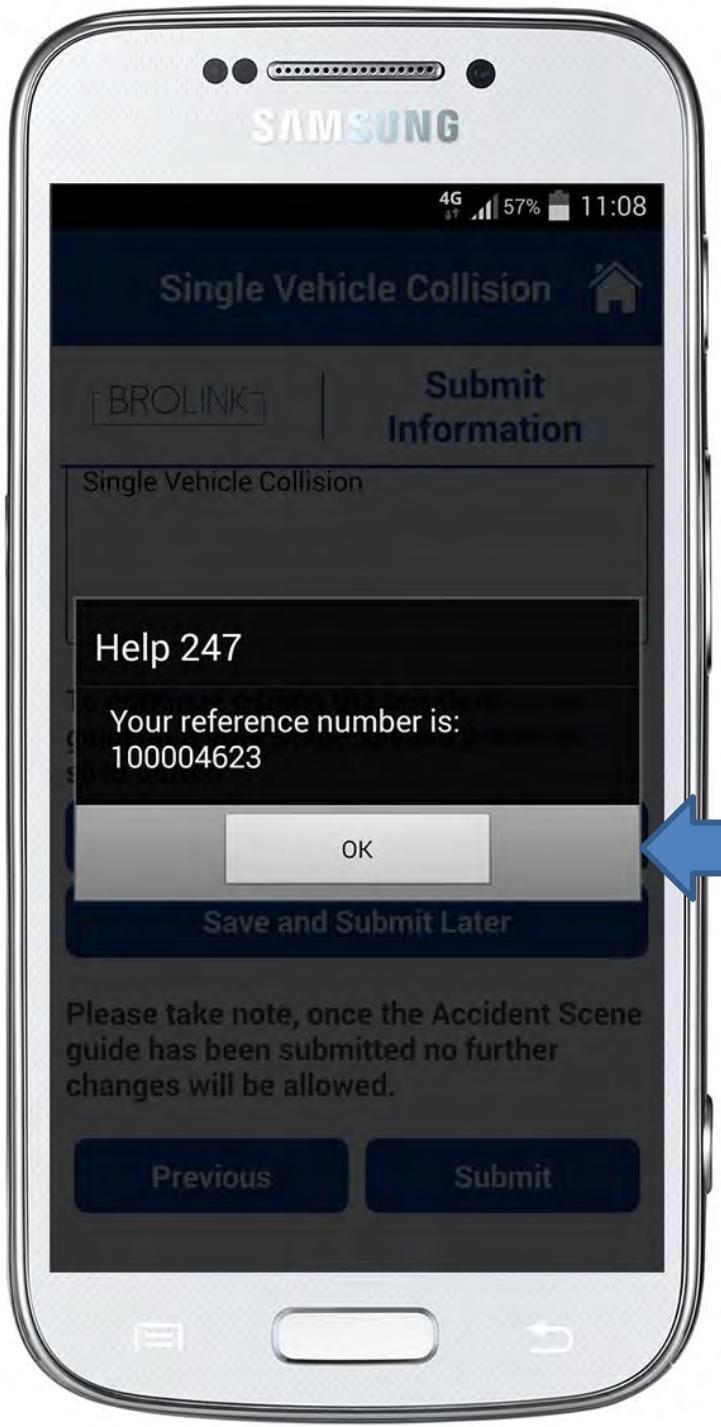
Accident Scene Guide
Single Vehicle Collision:

Submit Information

The client then has 3 options:

- **Review** a summary of the information collected
- **Save and Submit later** – if the client still has to add information
- **Submit**, this will send the information to our internal contact centre application.

Customer Loyalty Consultants



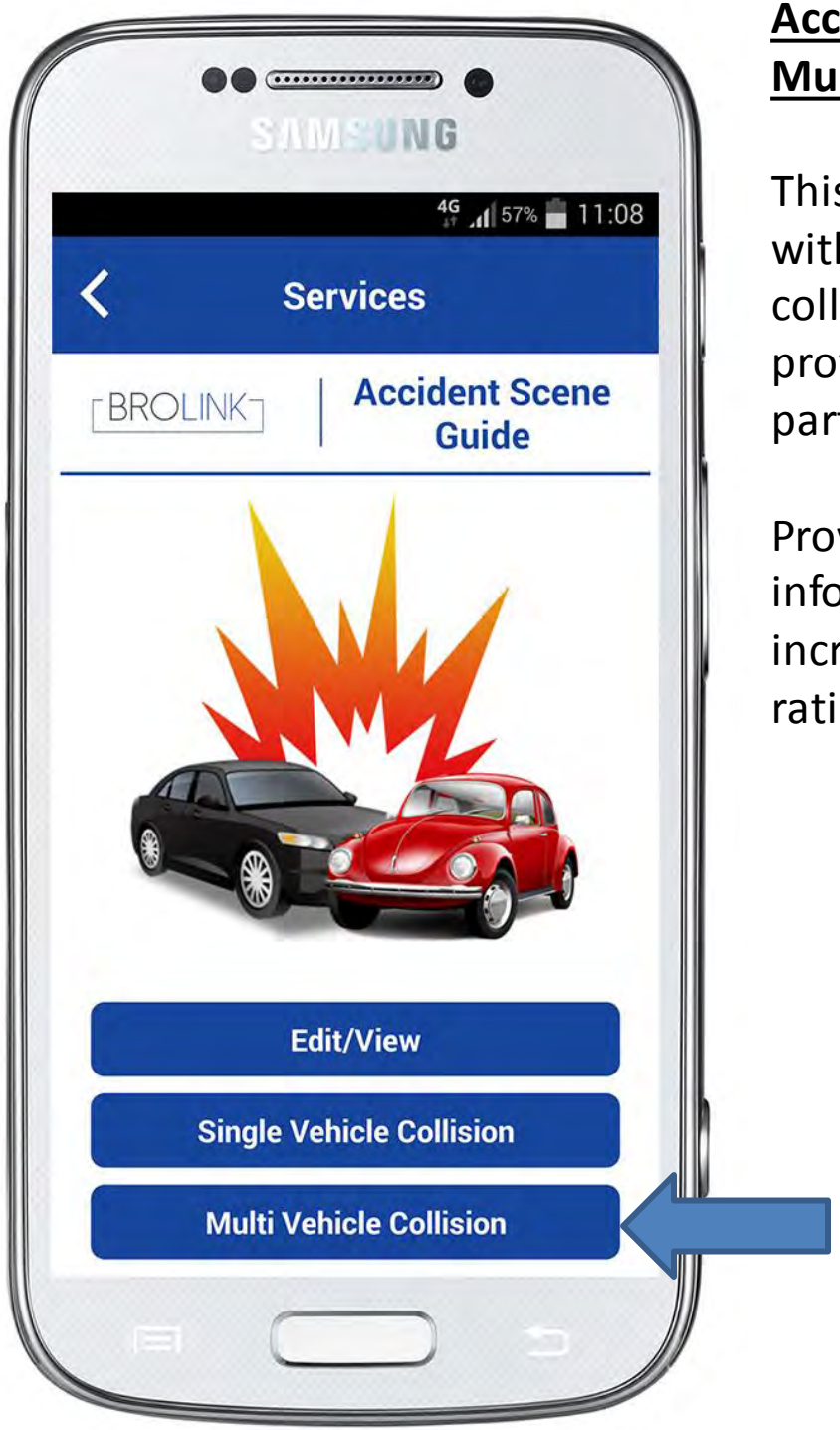
Accident Scene Guide
Single Vehicle Collision:

Reference Number:

Once the client has submitted the information, it will create a reference number.

Customer Loyalty Consultants

Customer Loyalty Consultants

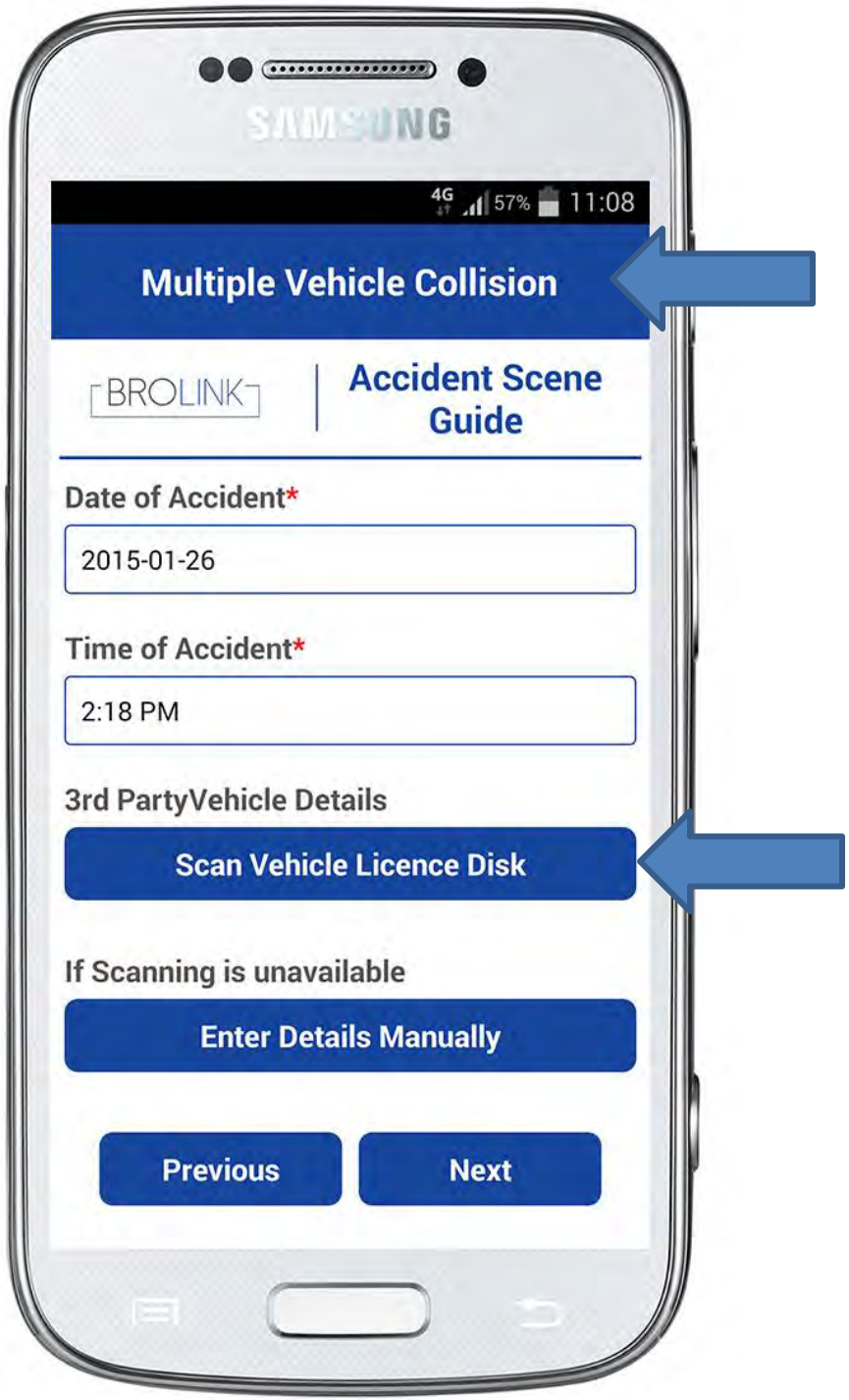


Accident Scene Guide
Multi Vehicle Collision

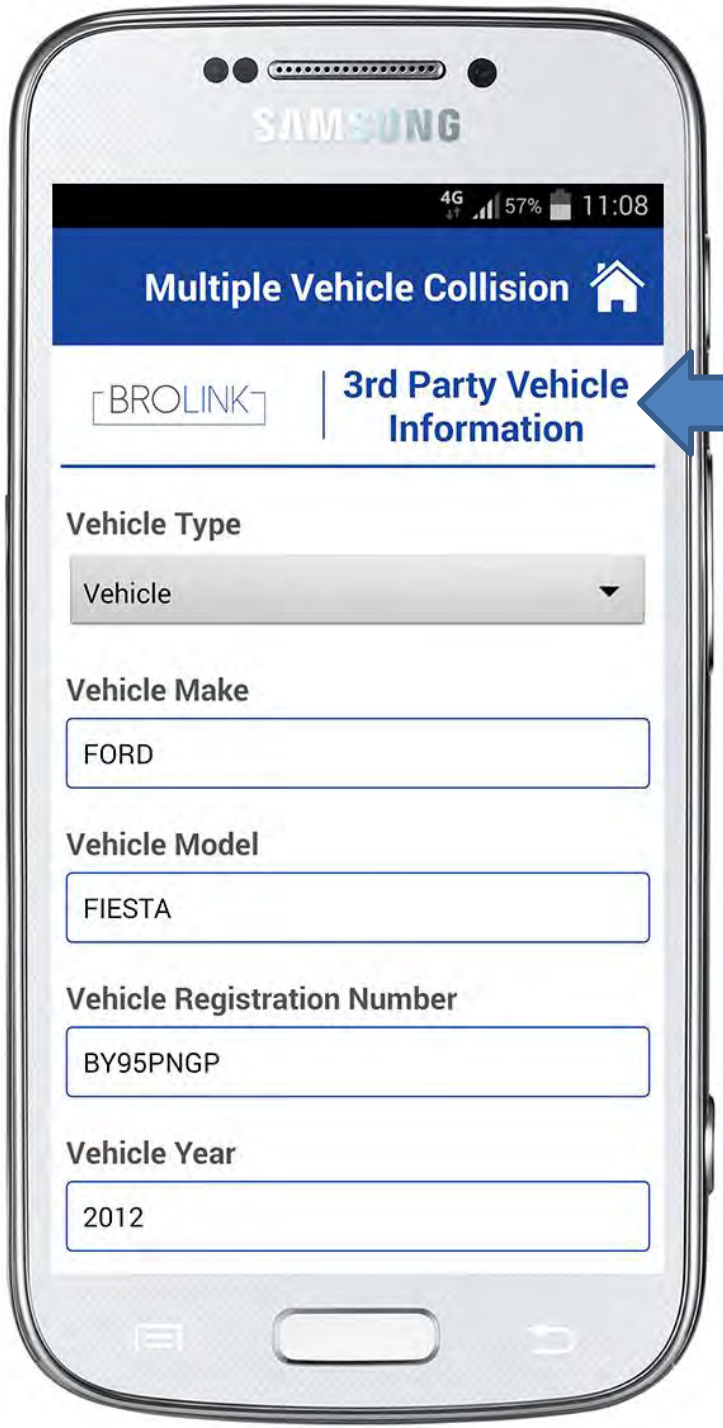
This has the same process as with the single vehicle collision, except this makes provision to collect the 3rd party information.

Providing this crucial information to the insurer will increase the 3rd party recovery ratios.

Customer Loyalty Consultants



Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

3rd Party Vehicle Information

Scan the vehicle license disc, Information will return from the licence disc.

- Vehicle make,
- Vehicle Model,
- Vehicle registration number,
- Vehicle year,

Customer Loyalty Consultants

Accident Scene Guide
Multi Vehicle Collision

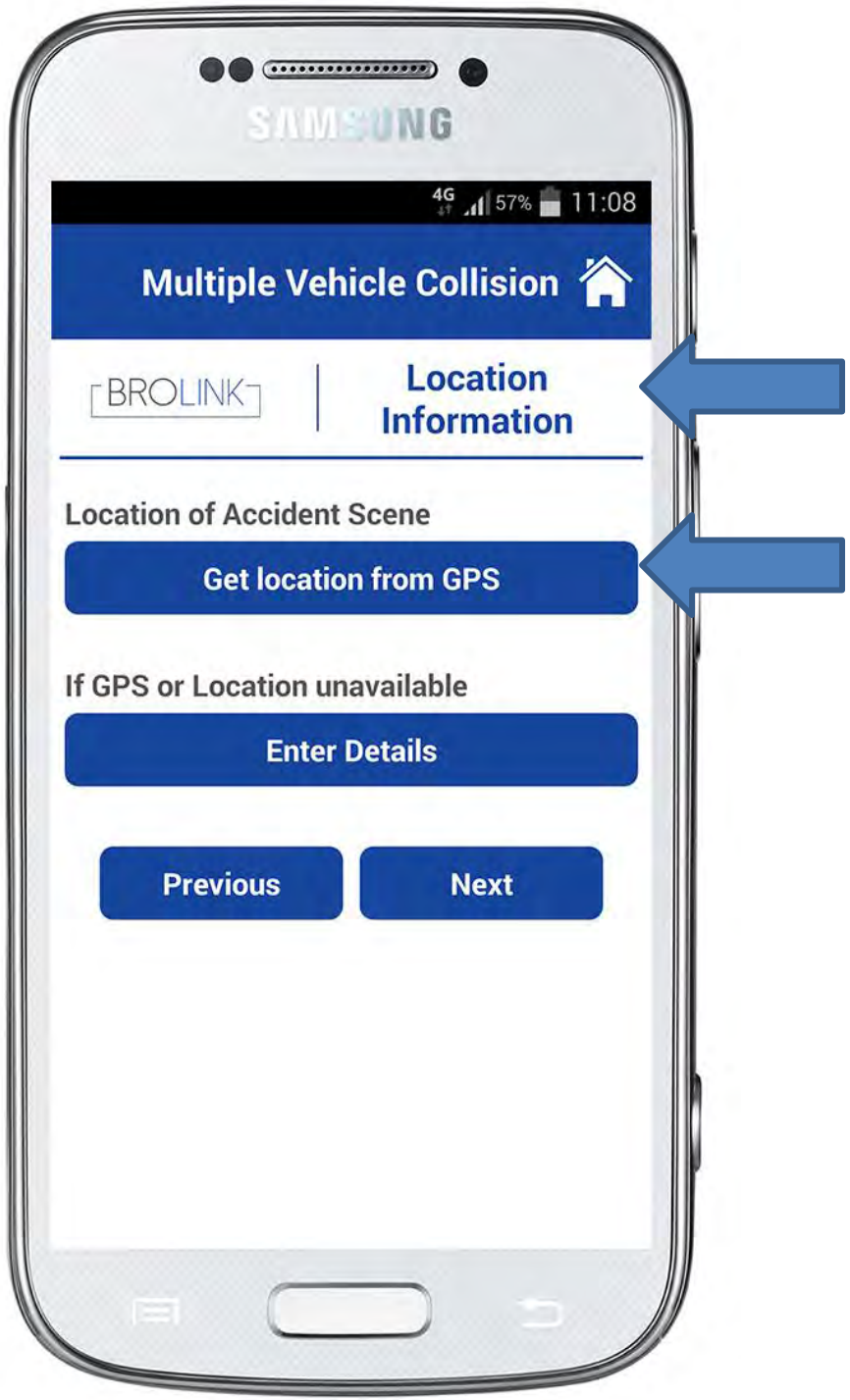
3rd Party Vehicle Information

- Vin Number
- Chassis Number
- Vehicle Colour

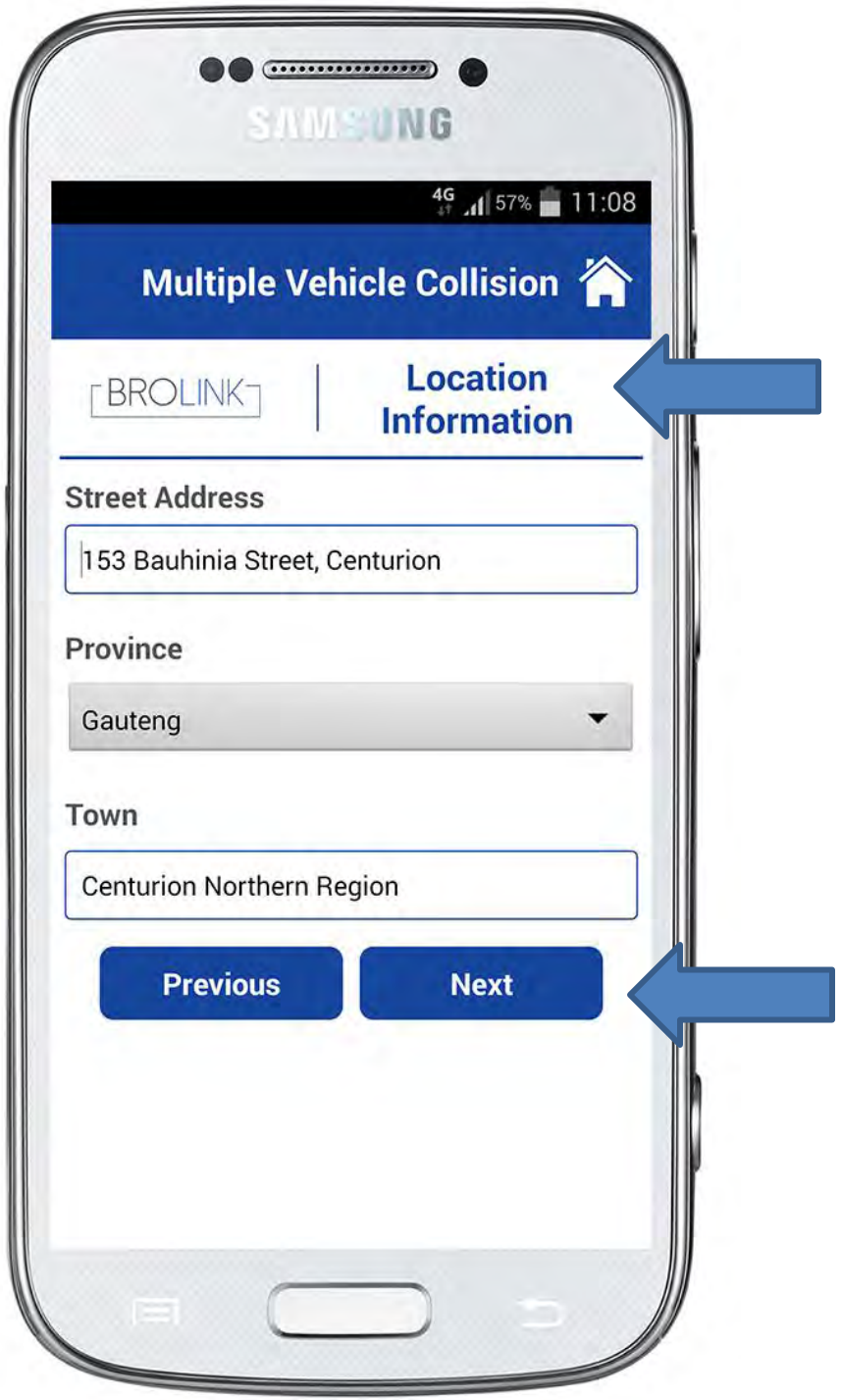
(Information will return from the licence disc.)

Take photo of the vehicle.

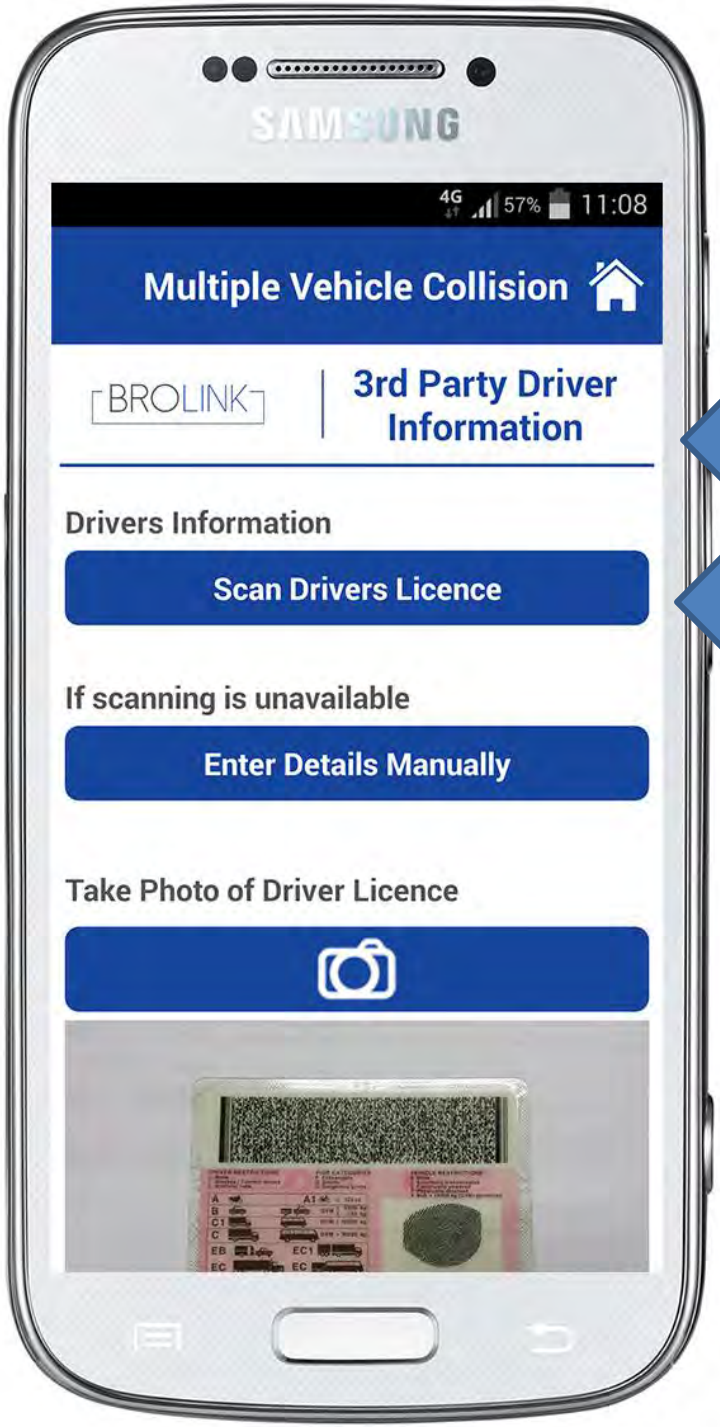
Customer Loyalty Consultants



Customer Loyalty Consultants



Customer Loyalty Consultants



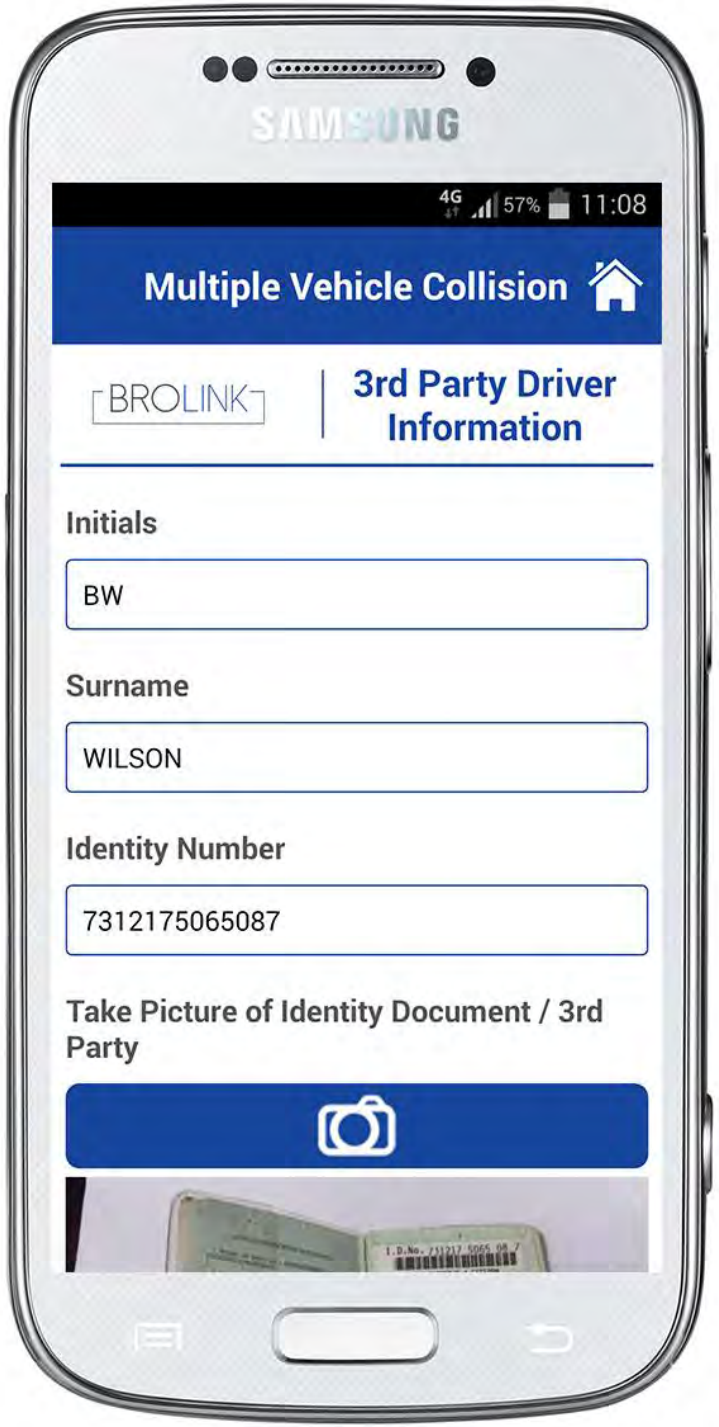
Accident Scene Guide
Multi Vehicle Collision

3rd Party Driver Information

Click on “Scan the drivers license”.

Take photo of driver licence.

Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

3rd Party Driver Information

Information returning from the drivers licence.

Take a photo of the Identity document or 3rd Party

Customer Loyalty Consultants

Accident Scene Guide
Multi Vehicle Collision

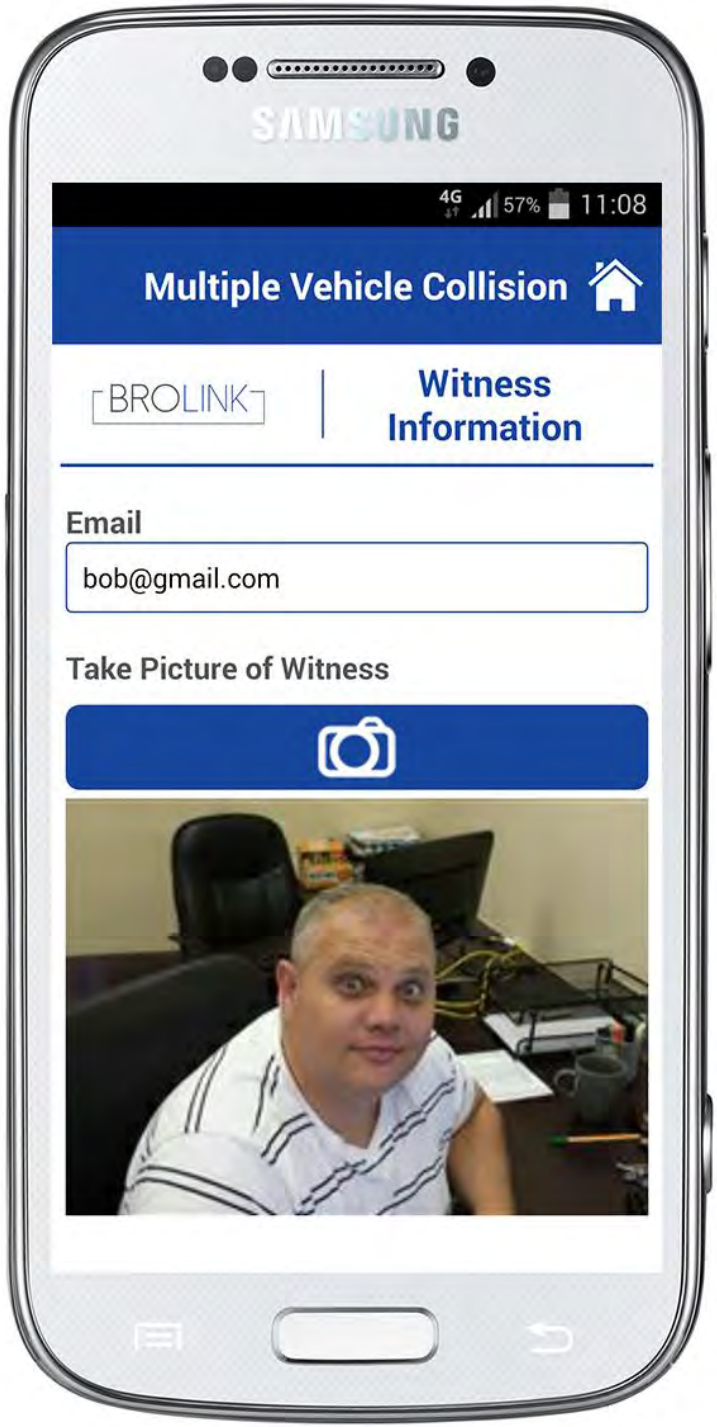
Witness Information

Collect witness information

- Name
- Surname
- Identity number
- Contact Number

Click on “next”

Customer Loyalty Consultants



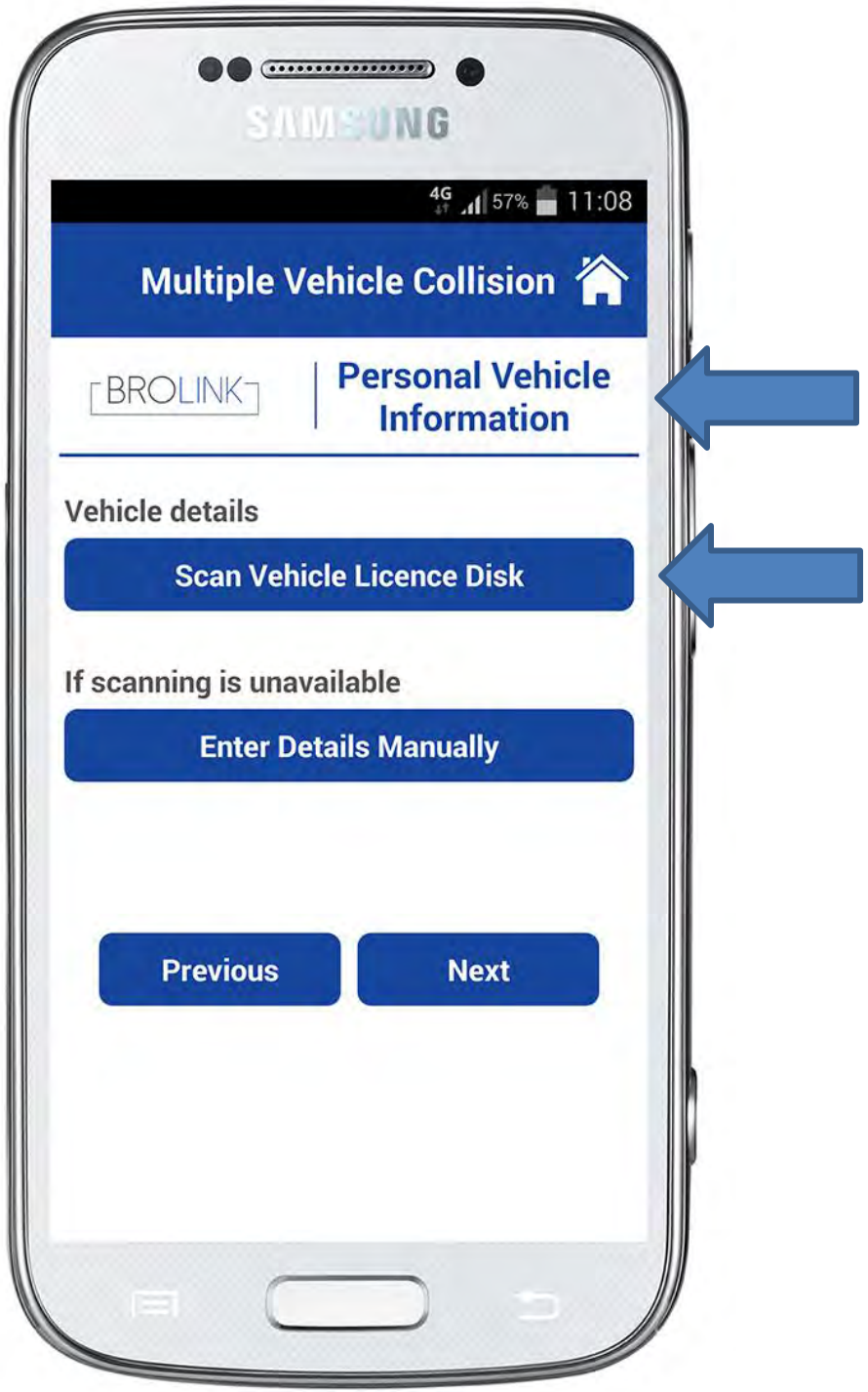
Accident Scene Guide
Multi Vehicle Collision

Witness Information

Enter email address

Take photo of witness

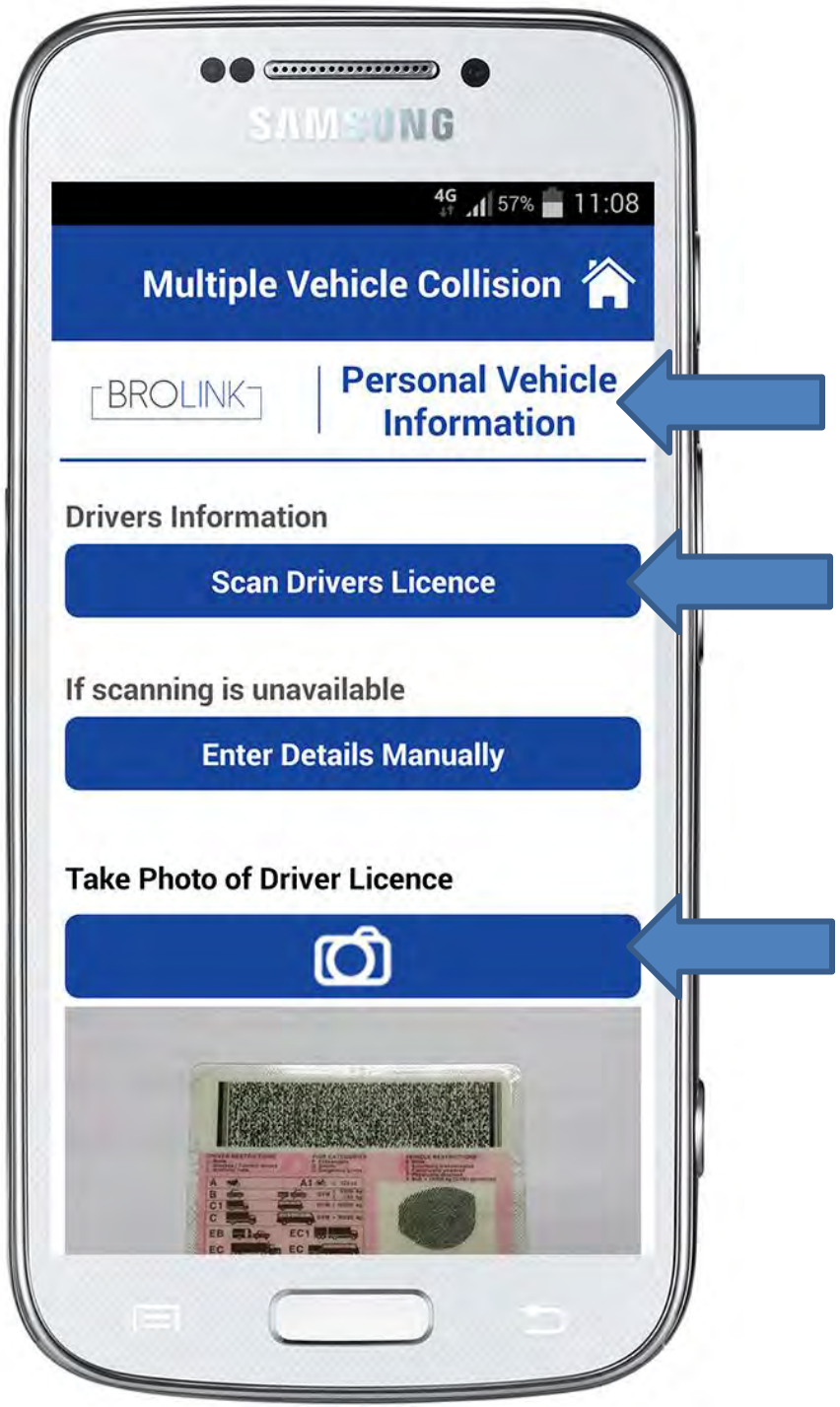
Customer Loyalty Consultants



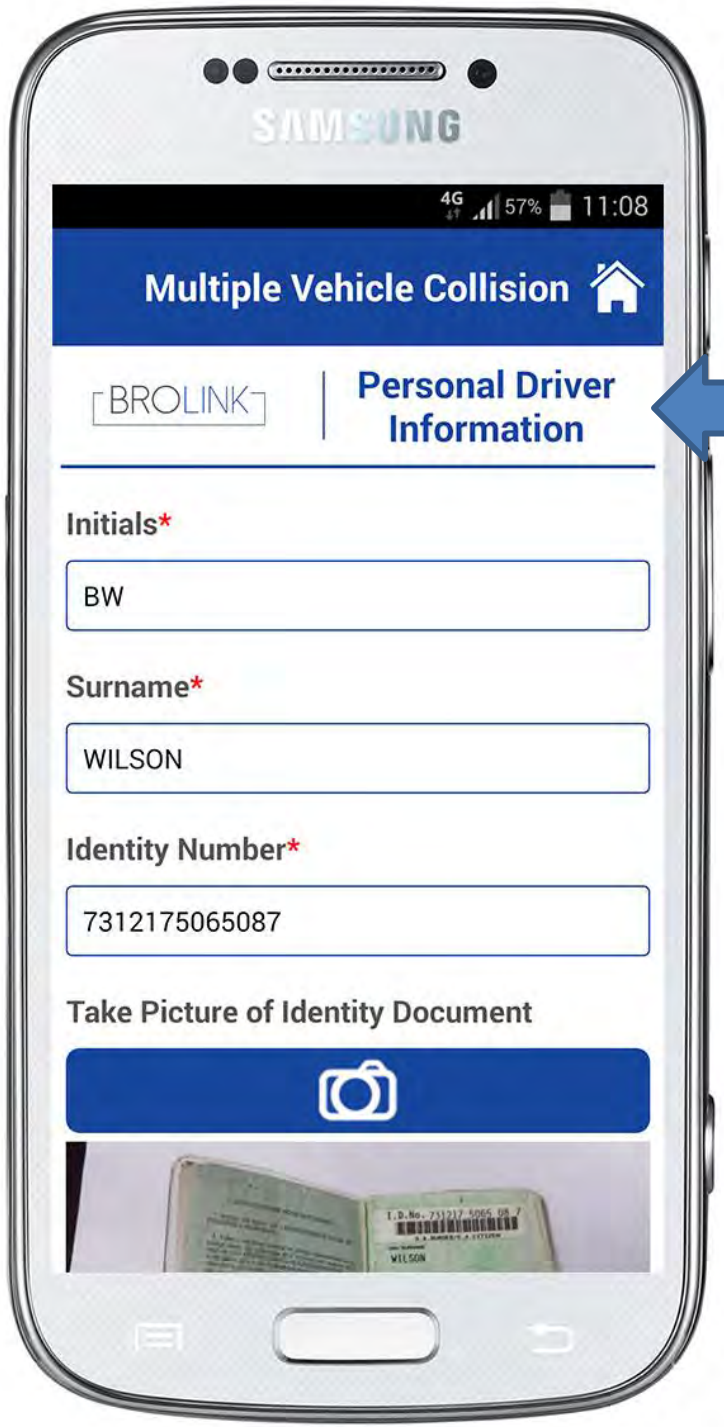
Customer Loyalty Consultants

Customer Loyalty Consultants

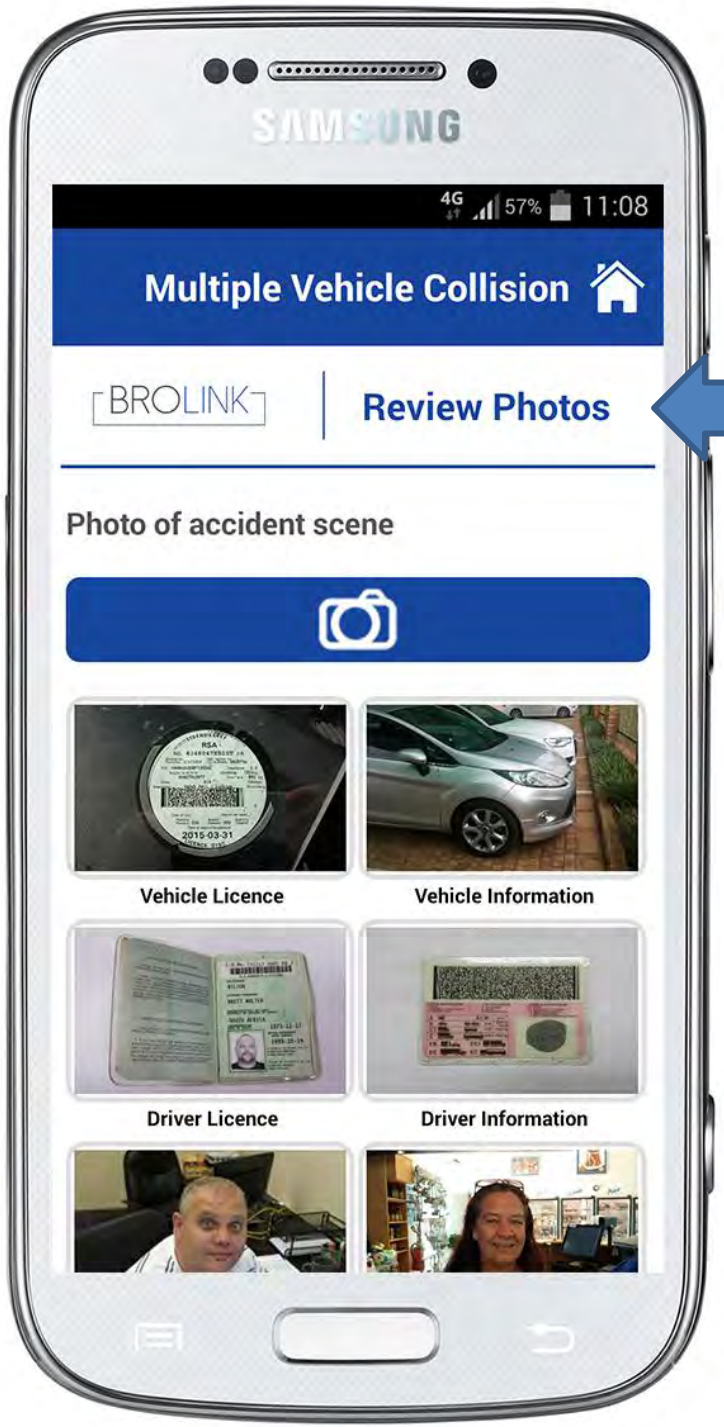
Customer Loyalty Consultants



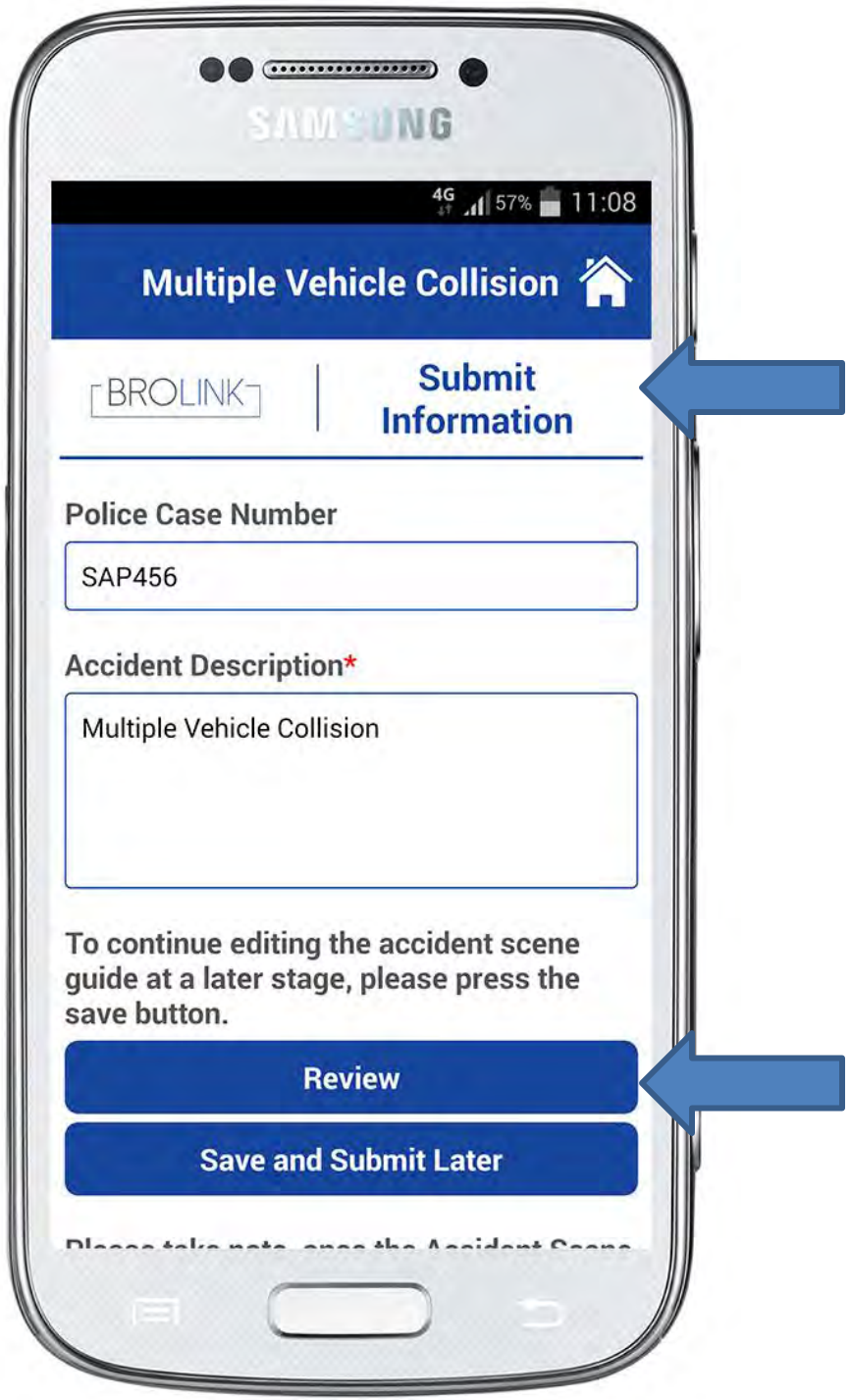
Customer Loyalty Consultants



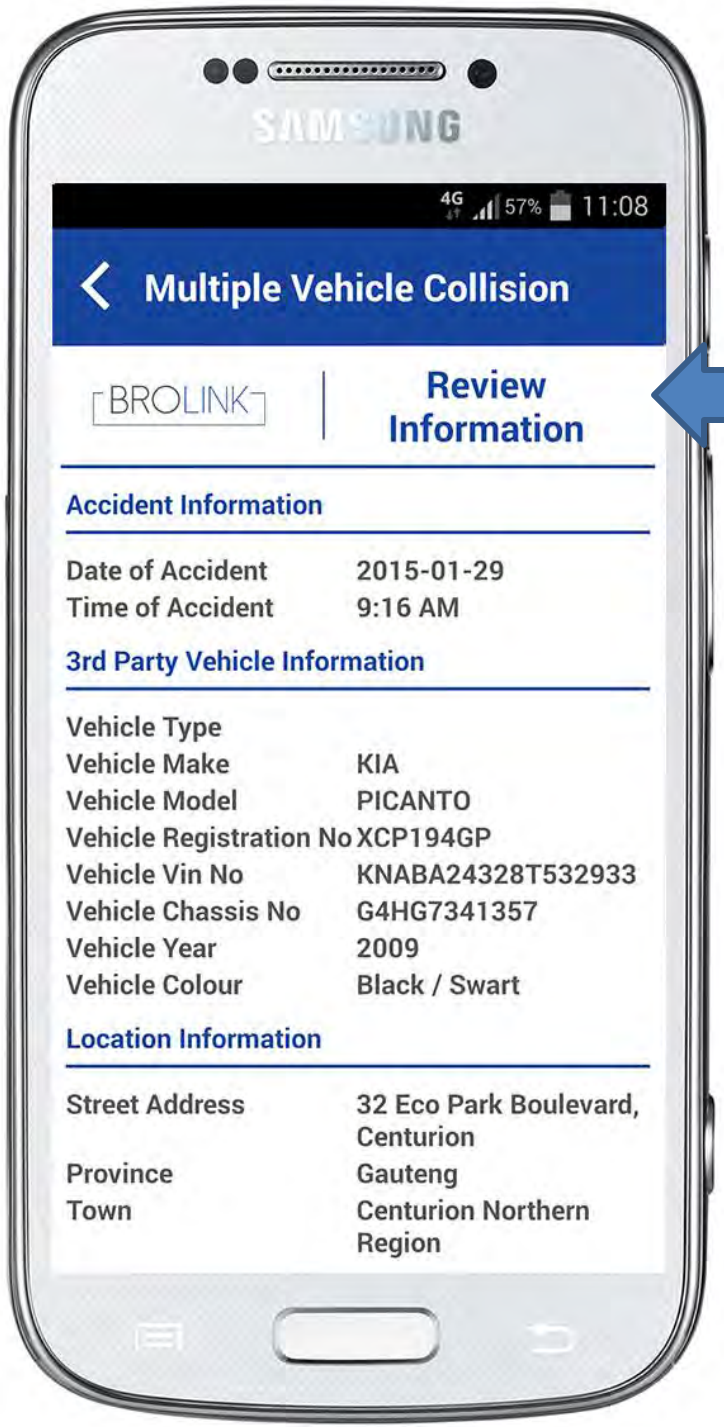
Customer Loyalty Consultants



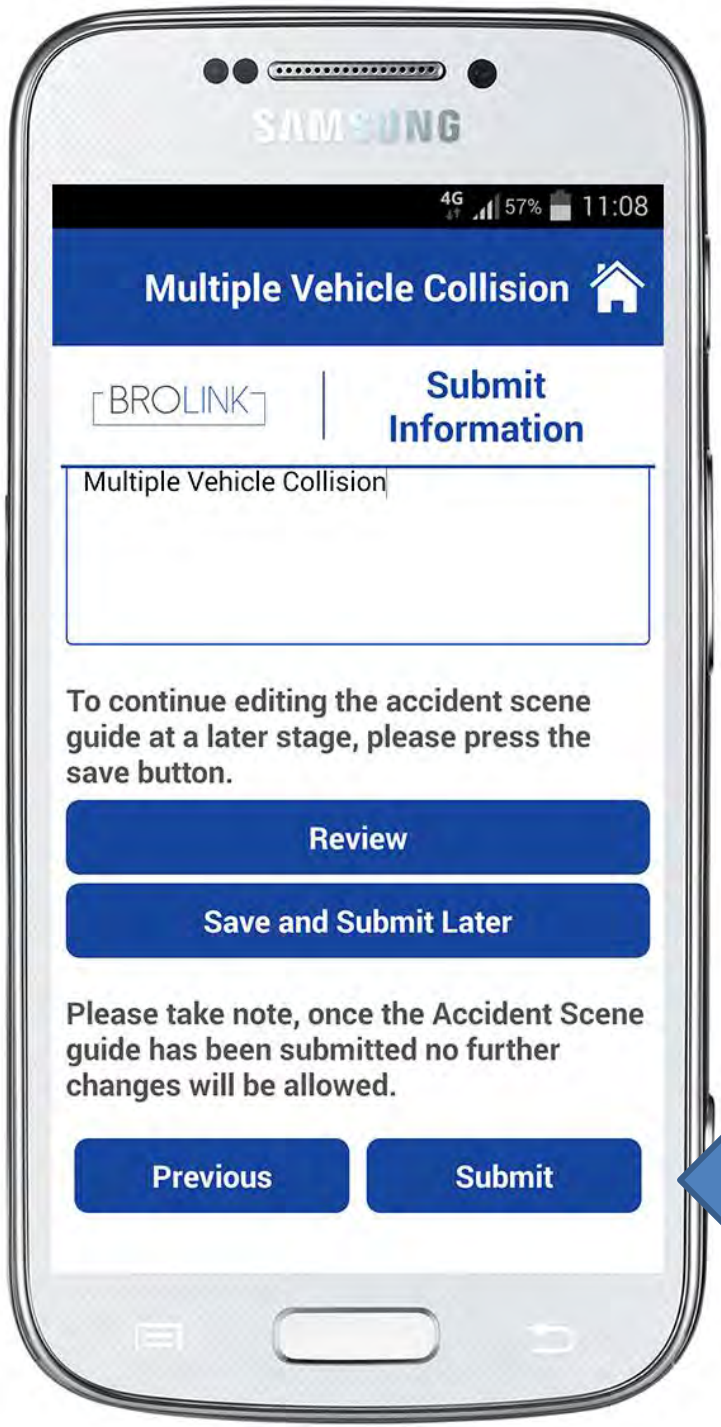
Customer Loyalty Consultants



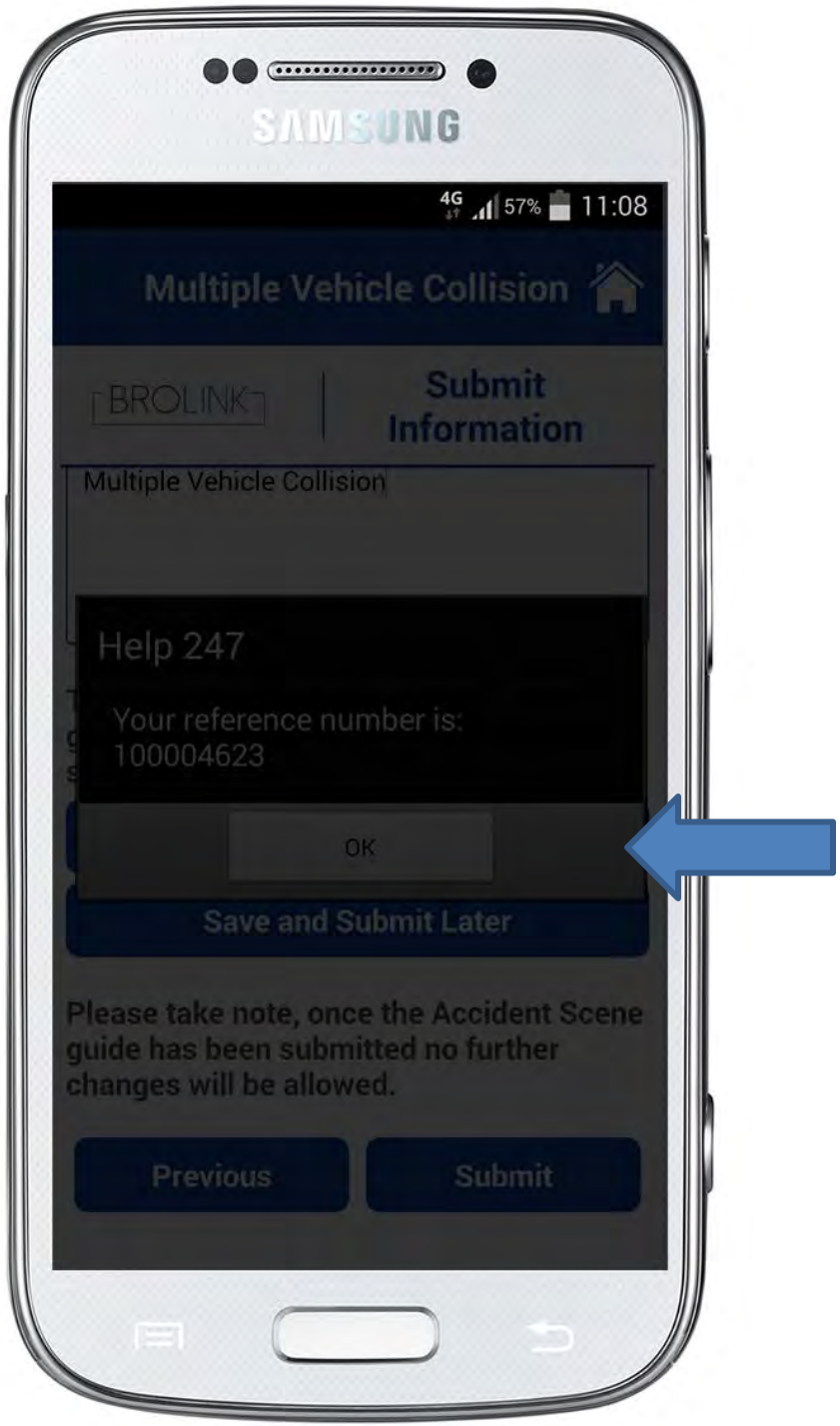
Customer Loyalty Consultants



Customer Loyalty Consultants



Customer Loyalty Consultants



Customer Loyalty Consultants

Accident Scene Guide

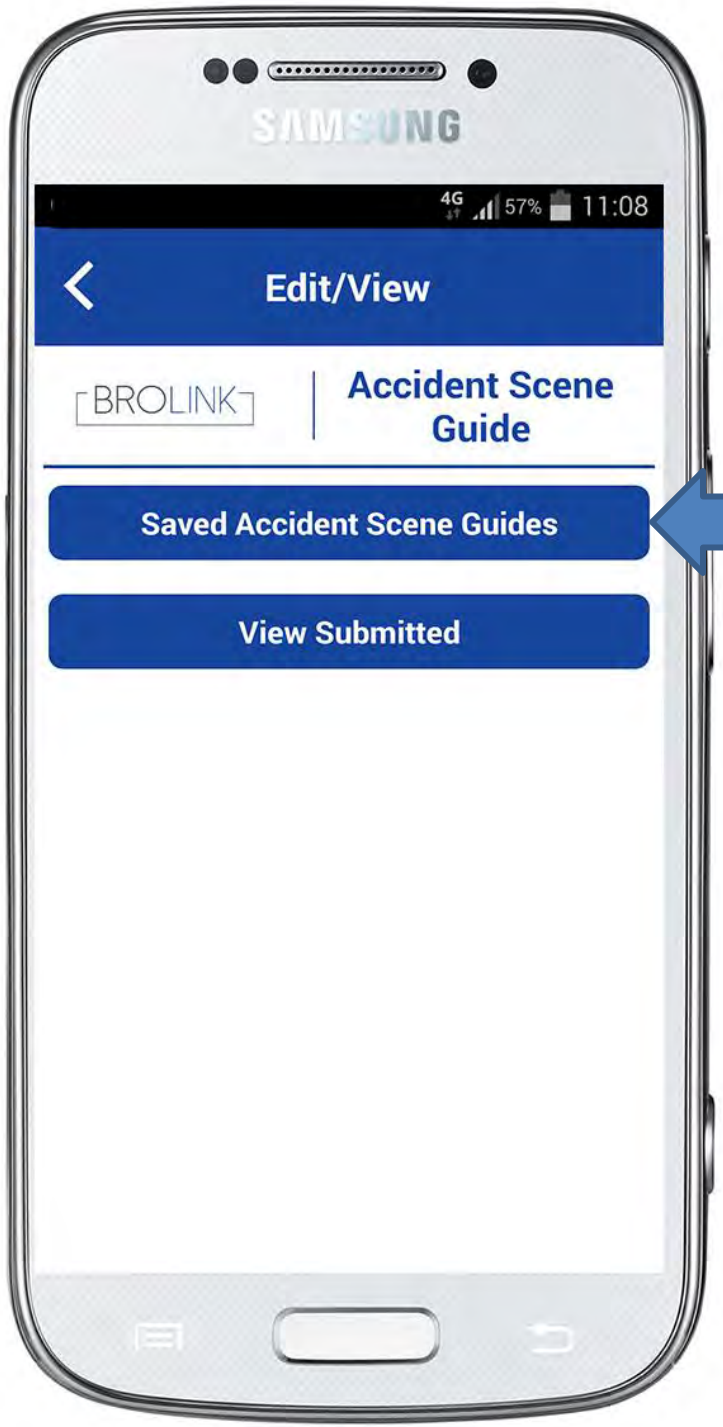
Customer Loyalty Consultants

Accident Scene Guide
Multi Vehicle Collision

Edit/View:

This allows the client to go back and add information if the details has not been submitted as yet.

Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

Edit/View:
View saved accident scene guides

Customer Loyalty Consultants

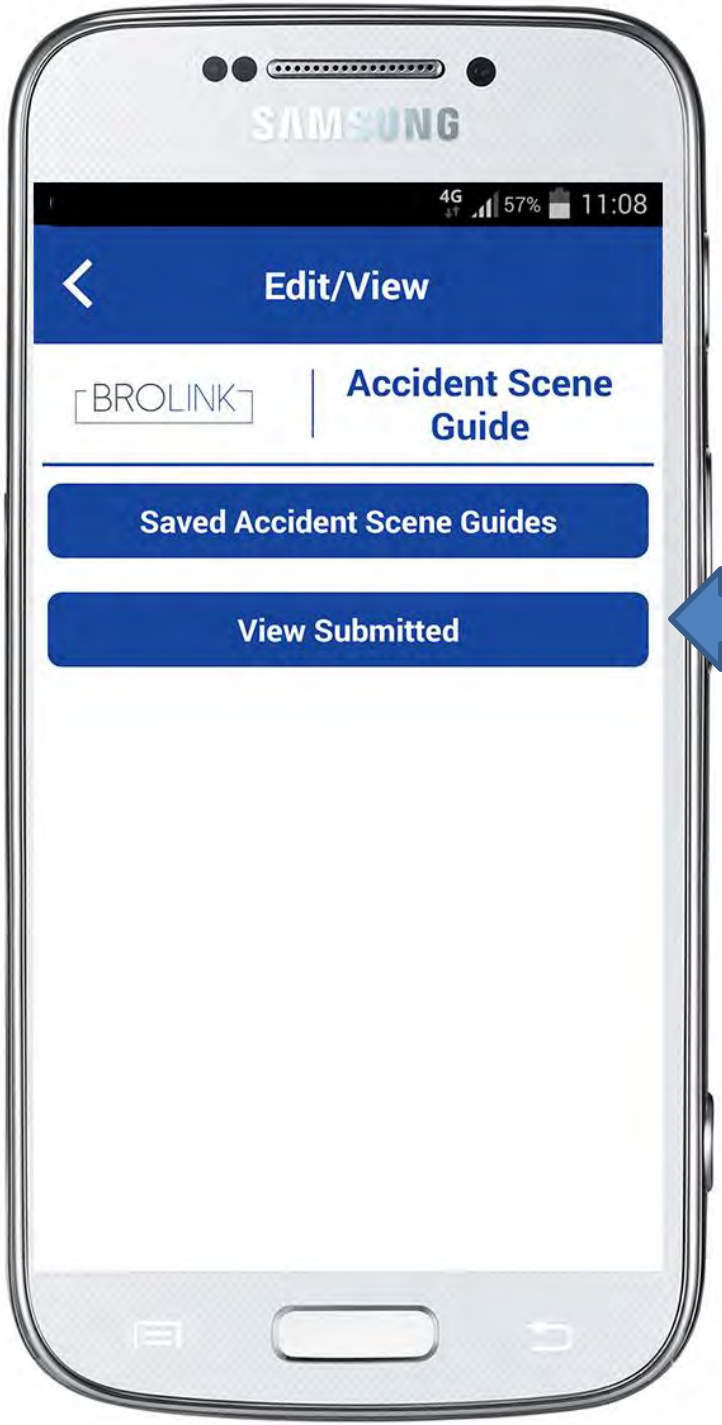
Accident Scene Guide
Multi Vehicle Collision

Edit/View:

Select the incident you want to edit (if more than one.)

Enter the information where required and submit.

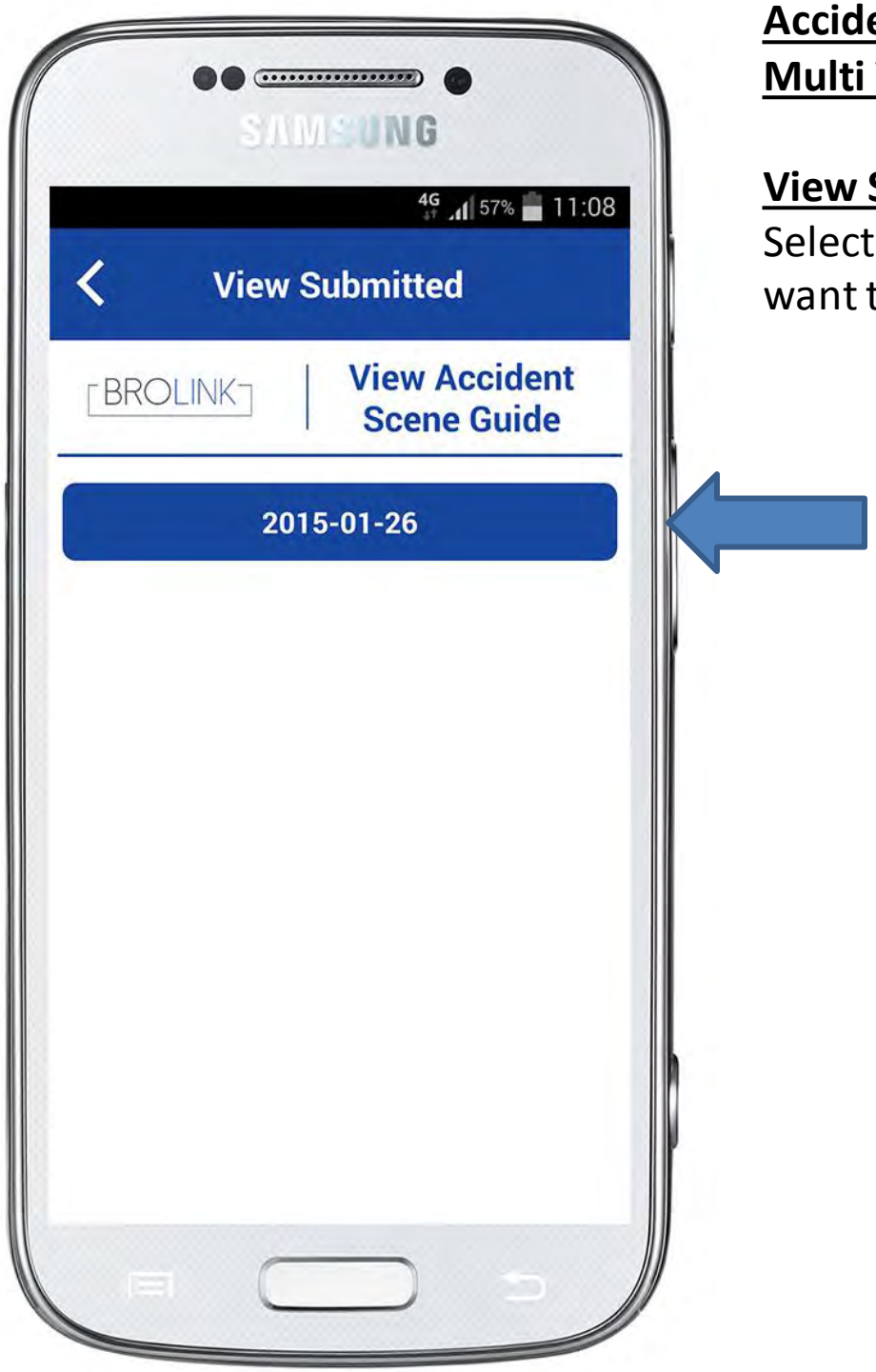
Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

View Submitted:
The client would be able to view submitted information that is not editable.

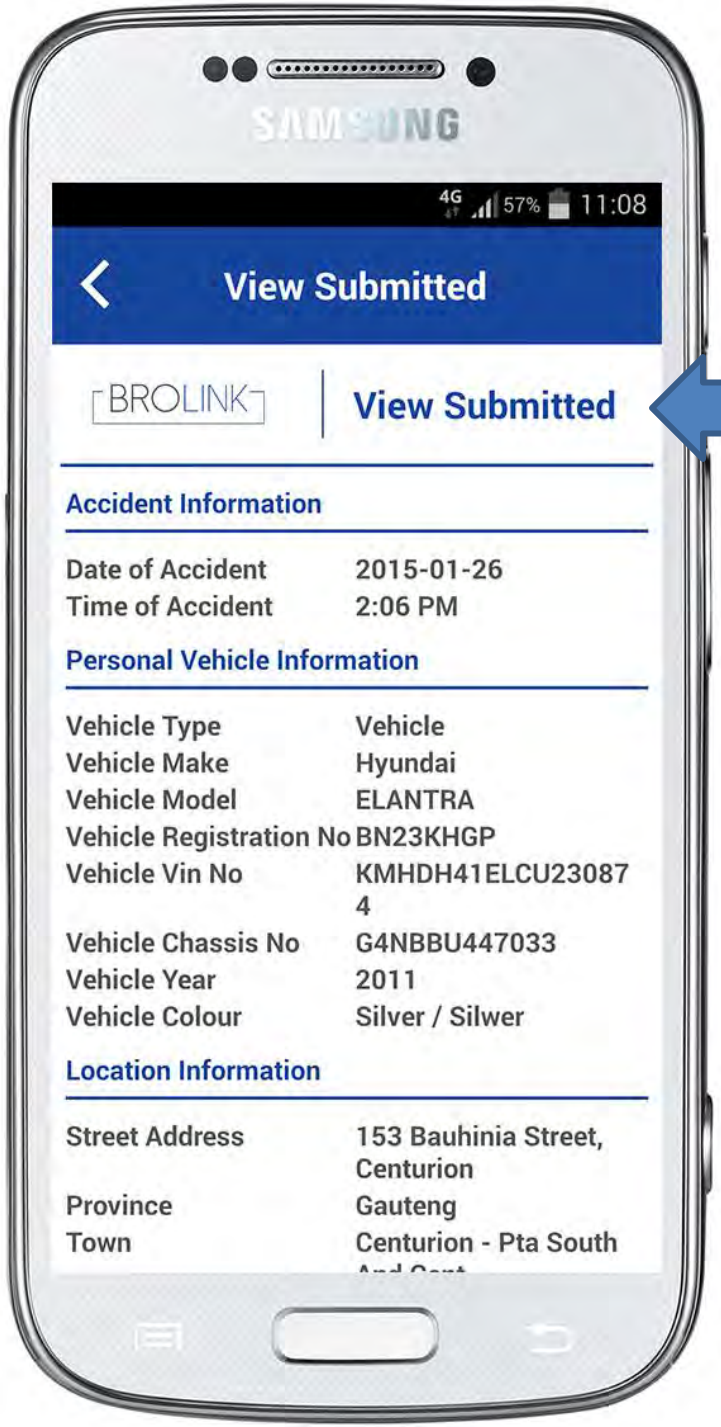
Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

View Submitted:
Select the submitted version you want to view.

Customer Loyalty Consultants



Accident Scene Guide
Multi Vehicle Collision

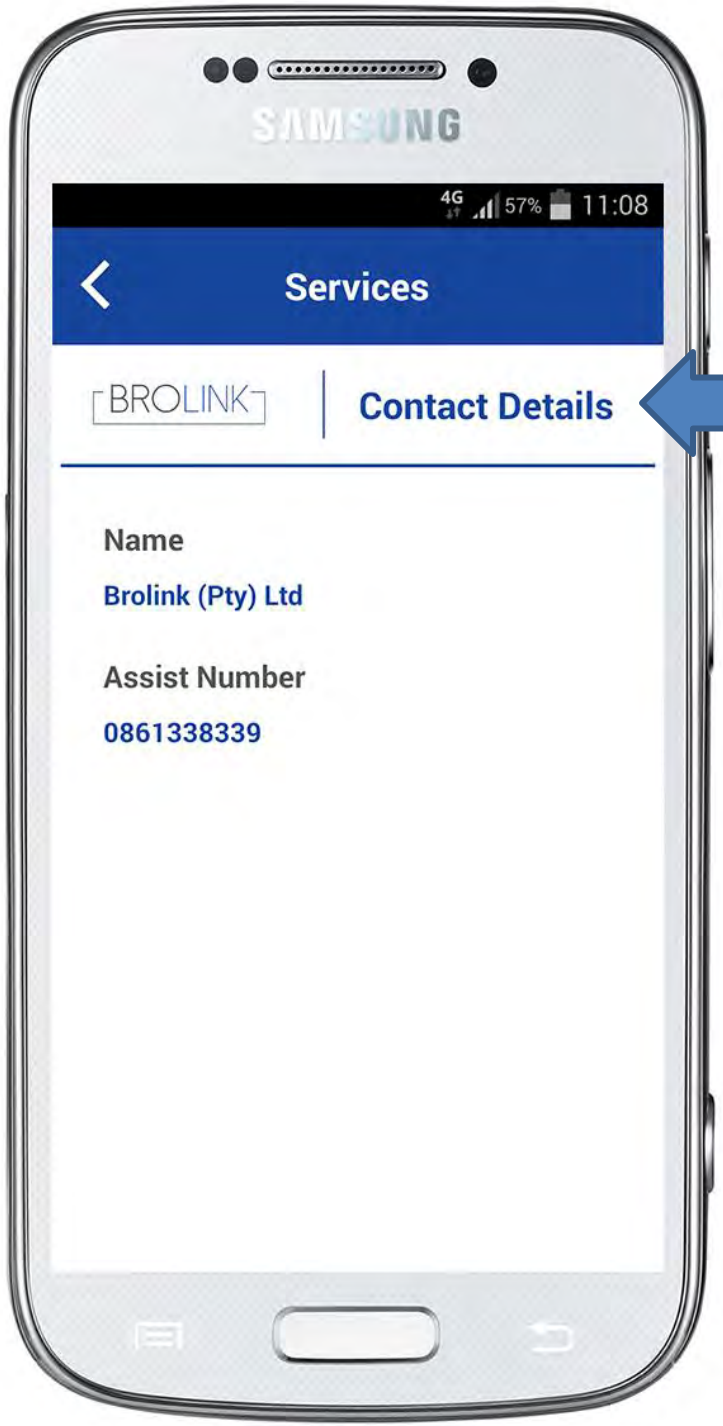
View Submitted:

This will show a summary of the information submitted.

Customer Loyalty Consultants

Contact Us

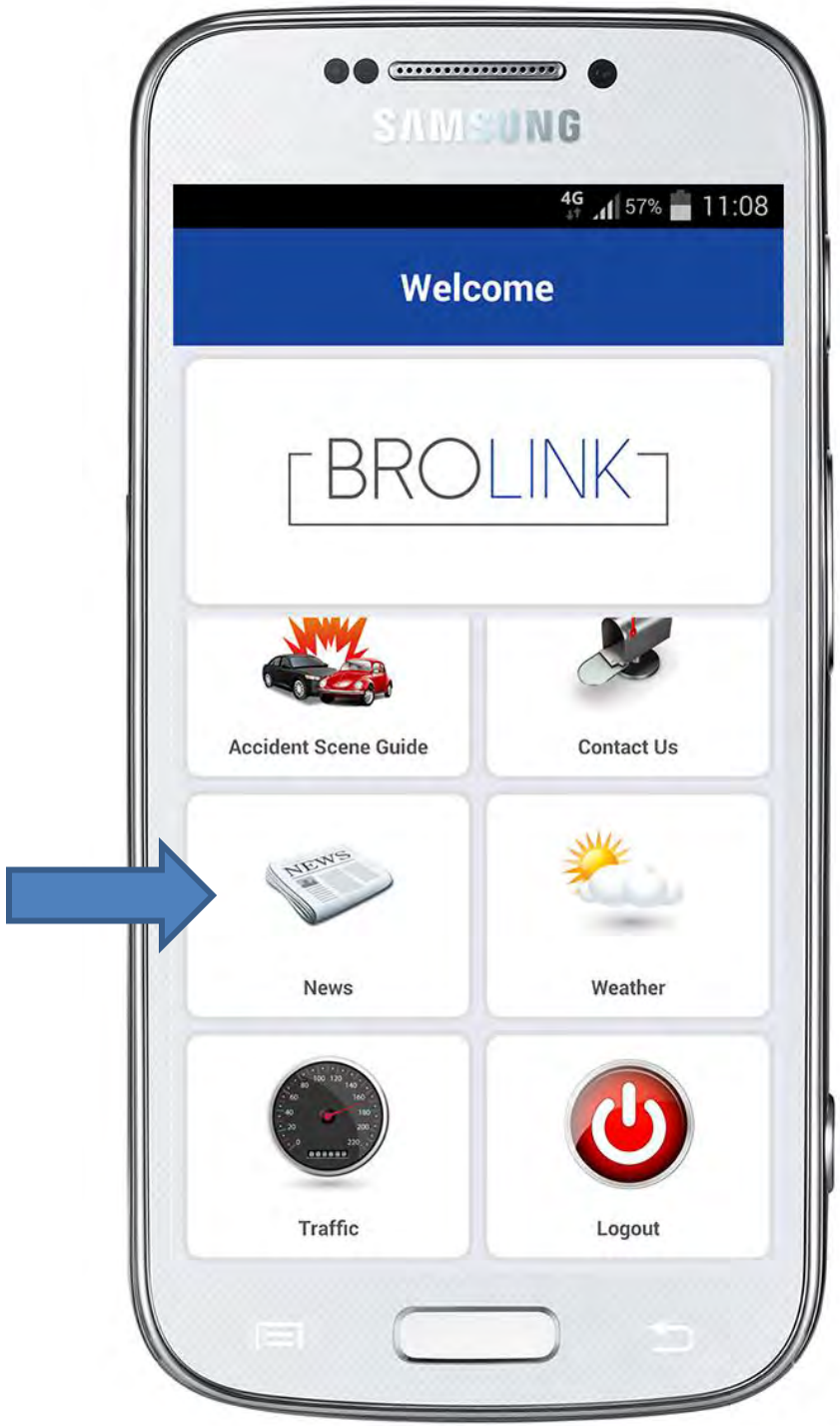
Customer Loyalty Consultants



Contact Us

The contact information of the assist number is available to the client. When the client touches the number it automatically starts dialling.

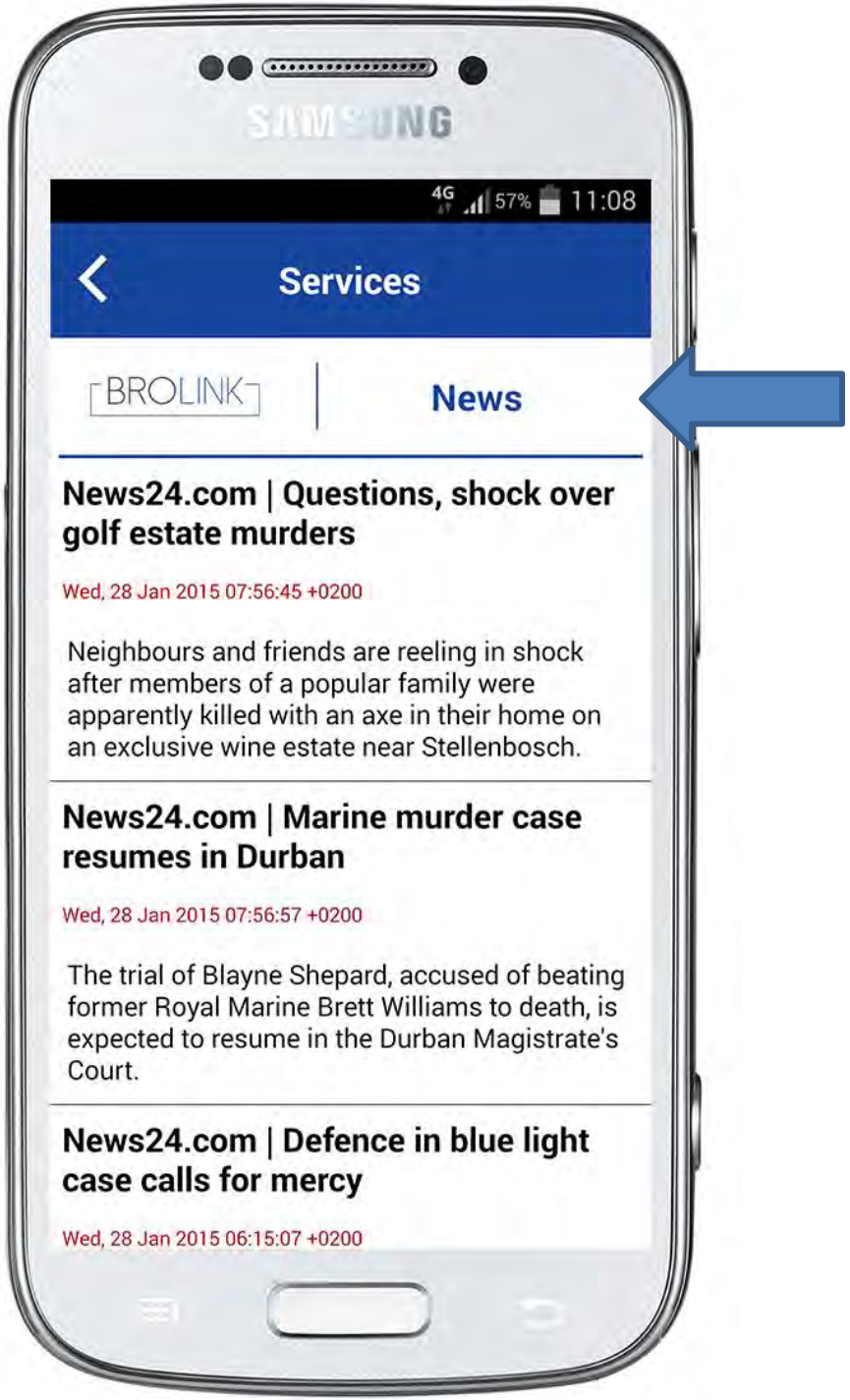
Customer Loyalty Consultants



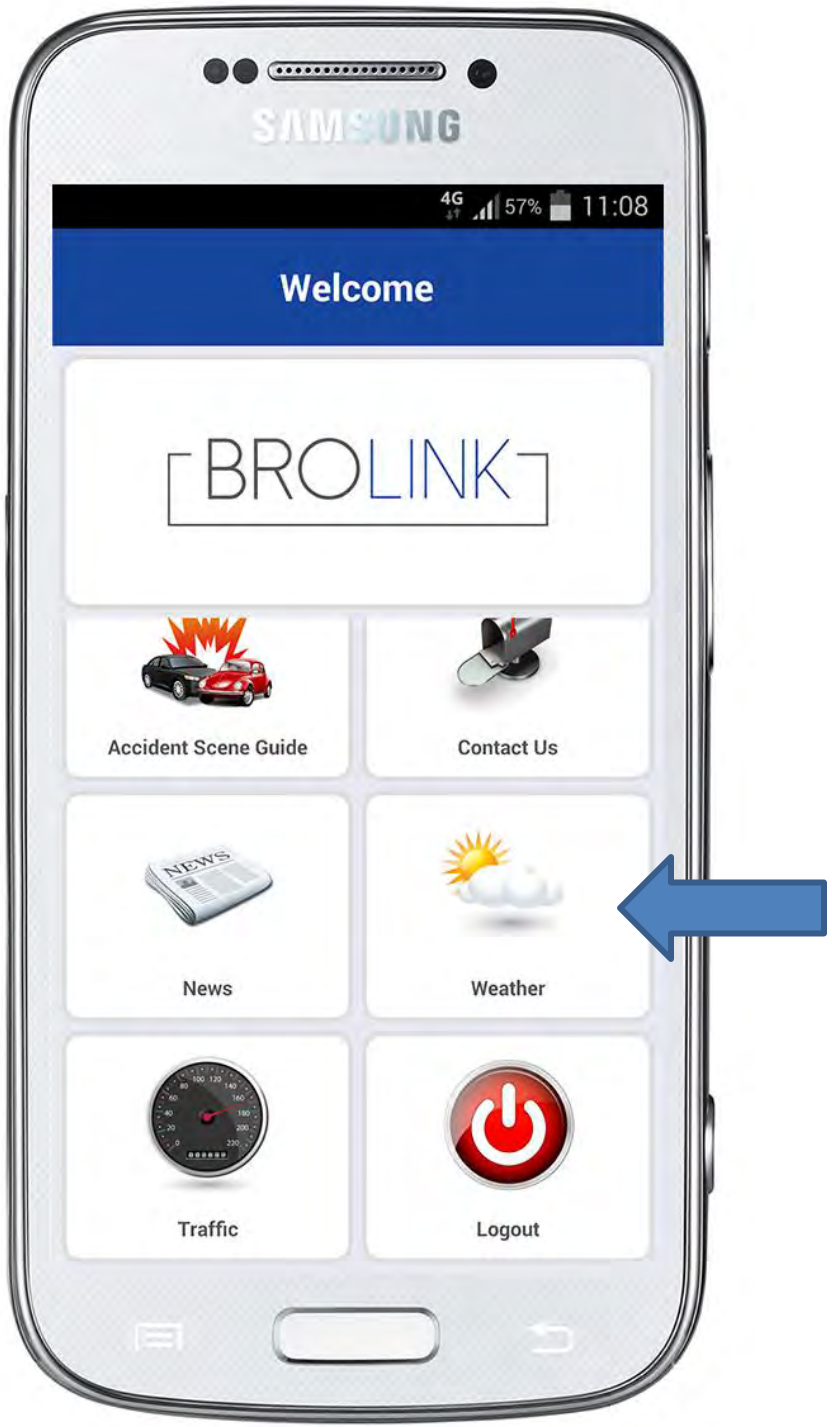
The client will also have access to:

- News
- Weather
- Traffic

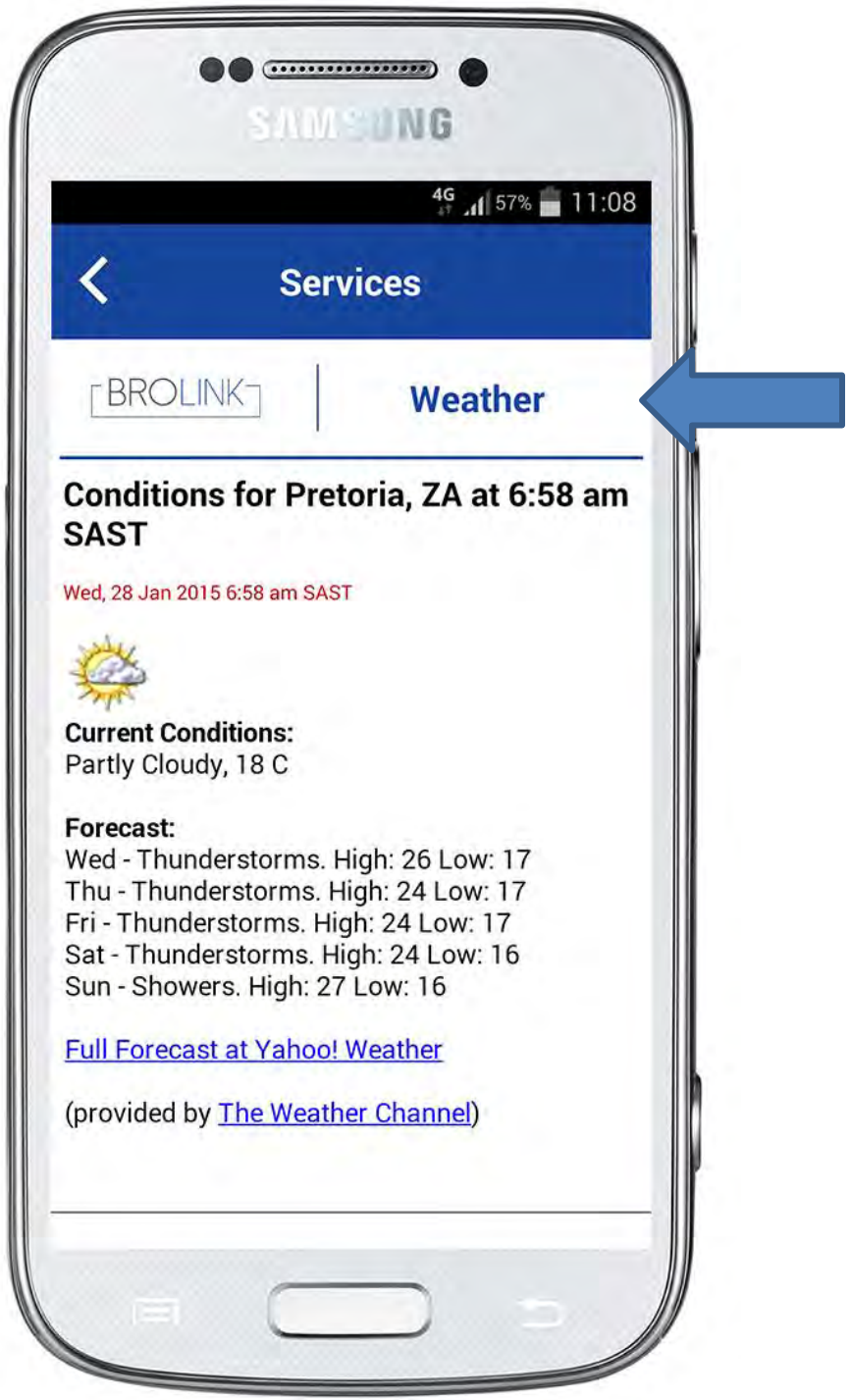
Customer Loyalty Consultants



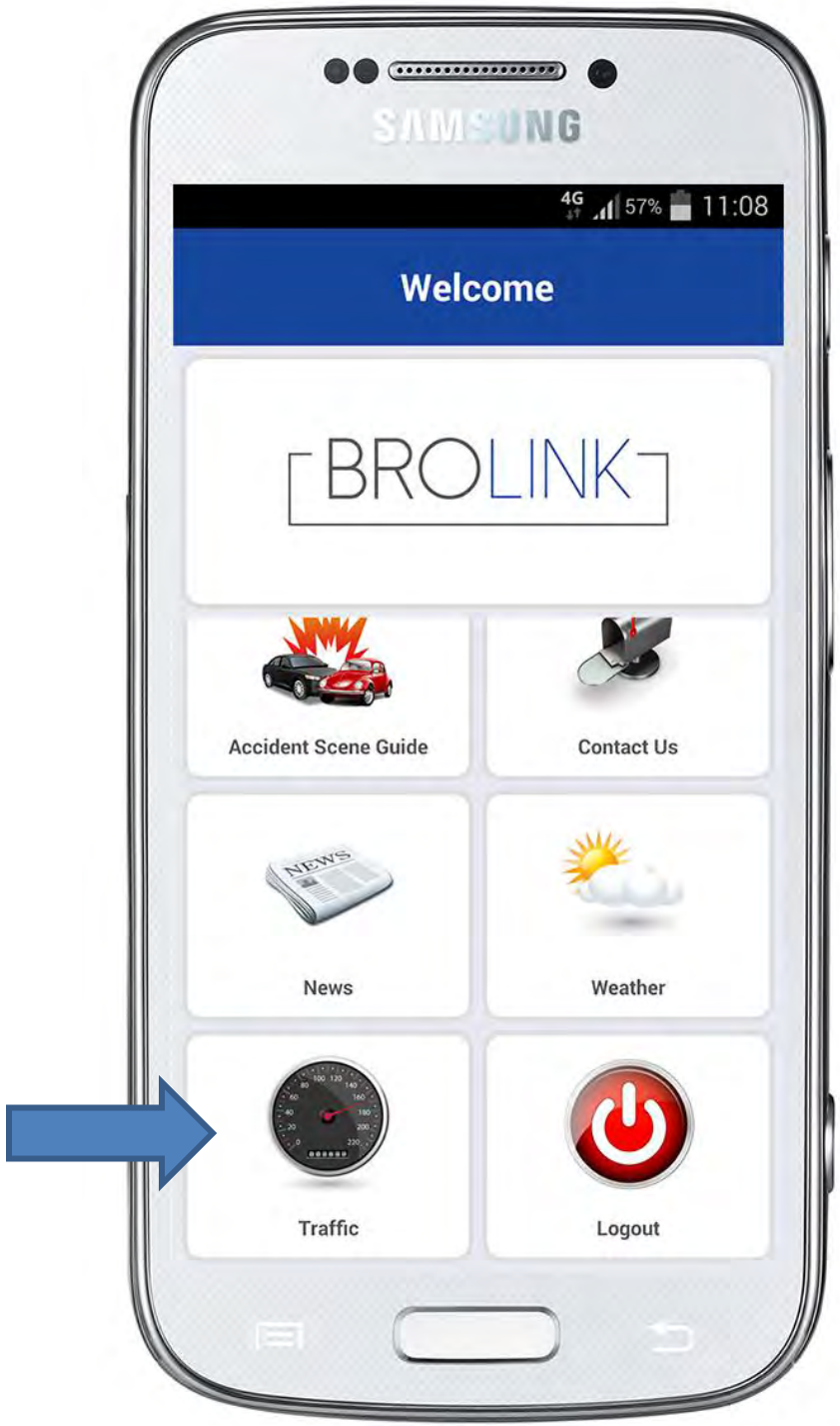
Customer Loyalty Consultants



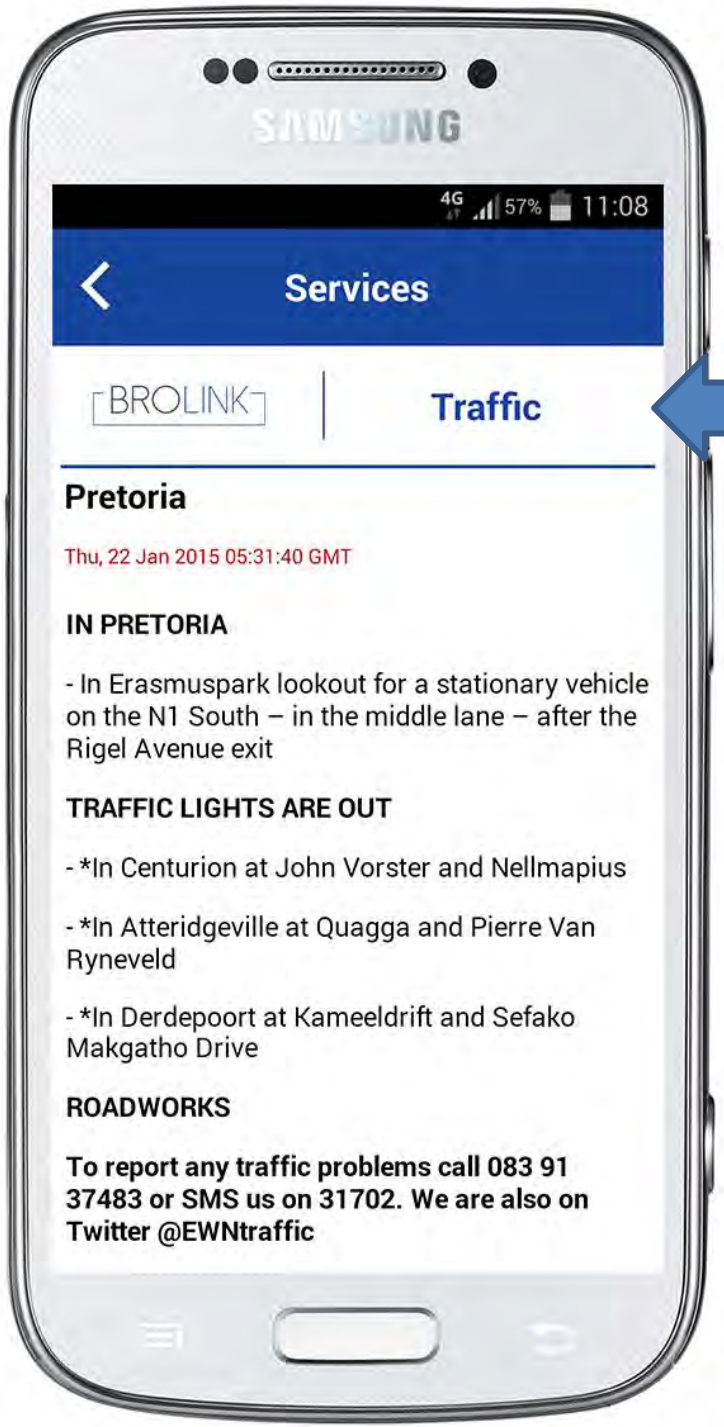
Customer Loyalty Consultants



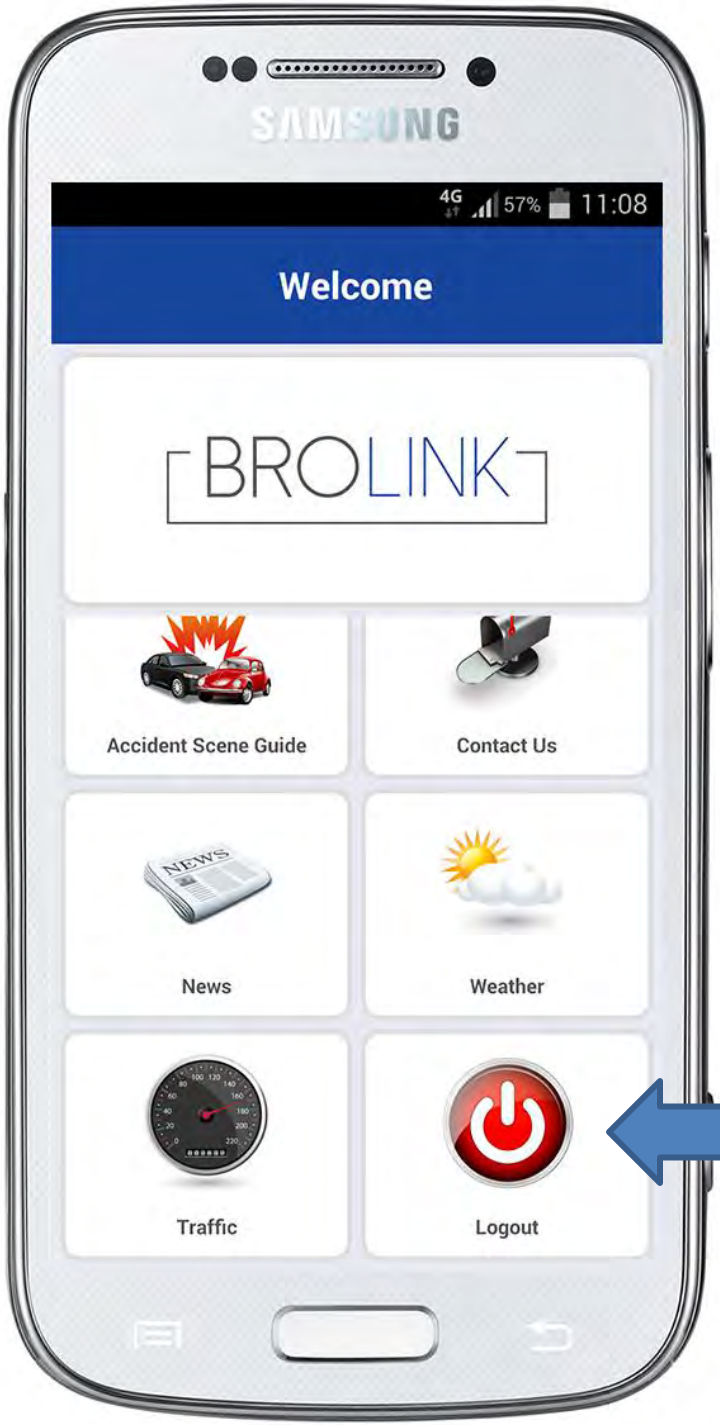
Customer Loyalty Consultants



Customer Loyalty Consultants



Customer Loyalty Consultants



Log Out:

If the client exits the App, they would be able to view the main page again when opening the App.
If the client “logs out” this will log the client out of the App.
The client will be required to log in with username and password again.

Customer Loyalty Consultants

Download Android Version

http://bit.ly/help247_Android

Available on the Android App Store

Download iOS Version

http://bit.ly/help247_iOS

Available on the App Store

QR Code

Customer Loyalty Consultants