

# Agent Service Guide

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## **Register to become an Agent on our world wide network:**

### Step 1 - Download the App from the webpage:

<https://app.claimsplanet.com> or directly from the Apple Store or Google Play

- Once the App has downloaded click on it to launch the App from your device, and you will be directed to the main App landing screen.

### Step 2 - Apply / Create Account (button on the top right)

- Enter your name as requested
- Enter your e-mail address
- Enter your postcode or select 'use my current location'
- Take an image of your passport or driving licence as proof of ID
- Take a profile photograph of yourself
- Select your Nationality
- Add a primary contact number
- Success, you have registered your interest to become an Agent. We will contact your for more information in due course.
- Once approved your will receive a confirmation e-mail.

## **Approved Agents Process:**

### Step 1 - Sign In

- Click on the Sign In button and enter your e-mail address and enter your own unique password for use each time your access the App. *(Please do not share your access details with anyone for security reasons).*
- Click on the Sign In button.
- 'Claims Planet would like to access your camera' - select OK to allow the App to upload photographs taken on your device directly to the App.

### Step 2 - From main App screen titled 'Your Claim Folders' select the profile icon on the top right of the screen



- this will launch your profile screen, please check and confirm the detail entered are correct
- from the profile screen you can update your:
  - location settings
  - e-mail address
  - contact number
  - reset your App password

### Step 3 - Select the required claim from Your 'virtual' Claim Folders screen

- Blue folder indicate the appointment has been booked - you will have received an automatic email confirmation, as will the customer.

- Grey folder require an appointment to be scheduled with the customer

You will see 2 tabs:

- an information tab containing basic information about your claim and
- an items tab which list all the times associated with your claim
- you can add additional items from this tab if necessary
- When registering from the Website please add you items as required

#### **Step 4 - Schedule an Appointment**

- Contact the customer and agree a mutually convenient date and time
- Select appropriate customers grey folder
- 'Set Appointment' screen will be presented
- Select 'Agreed appointment date' field
- Select 'Save' top right
- Confirmation emails to the customer and you will be automatically sent when the appointment has been saved to the App and back office system.

#### **Step 5 - Take and annotate photographs and or take short videos of your damaged item(s)**

- On you device please ensue 'location setting' are switched to on 'when using the App'. This enable location geotagging of the images, a mandatory requirement.
- Select the camera or video icon and take images of your damaged items.
- Select 'Use' the photograph or video taken, OR delete and retake the image until you are happy with it.
- Annotate your photograph(s) and add notes if required by selecting the relevant annotation tools and notes icon.

#### **Step 6 - Add additional 'new/omitted' items if required/appropriate.**

- Add 'missing' or 'disposed of' items if previous omitted from the claim form to ensure the integrity of the final scheme of loss.

#### **Step 7 - Customer Signature - Sign to confirm the survey has been competed, and Rate the Agent**

- You are required to hand your device to the customer for them to electronically sign to confirm the survey of items has been completed
- Rating the agent provides us with useful quality information on the service provided.

#### **Step 8 - Send the survey for processing - its that easy**

- The Survey will be automatically sent to the Insurance Co directly, or to a loss adjusting service depending on each Insurance Companies individual process.
- On submission the customer will automatically be sent a copy of the completed and authorised survey, and you will receive an email thanking you for undertaken the survey for your records.