



My Service Cloud Ease of Reinstatements

When you partner with Broker Online Exchange, you will have a dedicated team who is committed to your success and available to provide insights, answer questions, assist with administrative tasks, and more. Now, reinstating a contract has never been easier!

The moment our customer service team receives a drop notification related to one of your deals, they will send you an email detailing the drop from service. You then have the ability to autogenerate a reinstatement form and send to the customer directly via DocuSign. This amazing feature allows us to quickly resubmit any deal to the necessary supplier to ensure the deal and your payouts remain flowing.

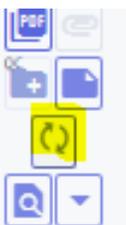
Anytime a form is needing to be signed by a customer, you can automatically generate it from the contract line by following these steps:

> Click on the Contracts tab found along the top banner:



> Find the specific agreement you are needing by searching via business name, account number, or any other deal criteria

> Once you have the correct contract line selected, you will find the 'Generate Reinstatement Form' button, that appears like this:

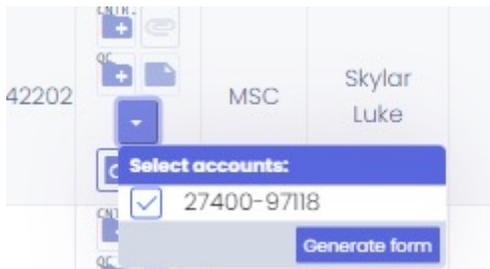


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> Select the account or accounts you would like to have listed on the form:



> Once all accounts are selected, click **Generate form**.

A pre-filled document from the specific supplier will populate where you can:

- Send via DocuSign
- Download to attach to an email and send directly to the customer
- Or complete an in-person signing if the customer is with you

If sent via DocuSign, the form will automatically upload to our system once signed and notify our suppliers of the request for re-enrollment.

If the form is downloaded and sent directly to the customer via your email, simply send the signed form back to your designated Account Manager and they will complete the reinstatement process for you.

Once the reinstatement has been approved by the supplier, any claw backs will be waived, and the dropped account(s) will be in a flowing status of "Reinstated".

