

momentum
Traditional

WhatsApp Document Upload

How to upload documents using WhatsApp



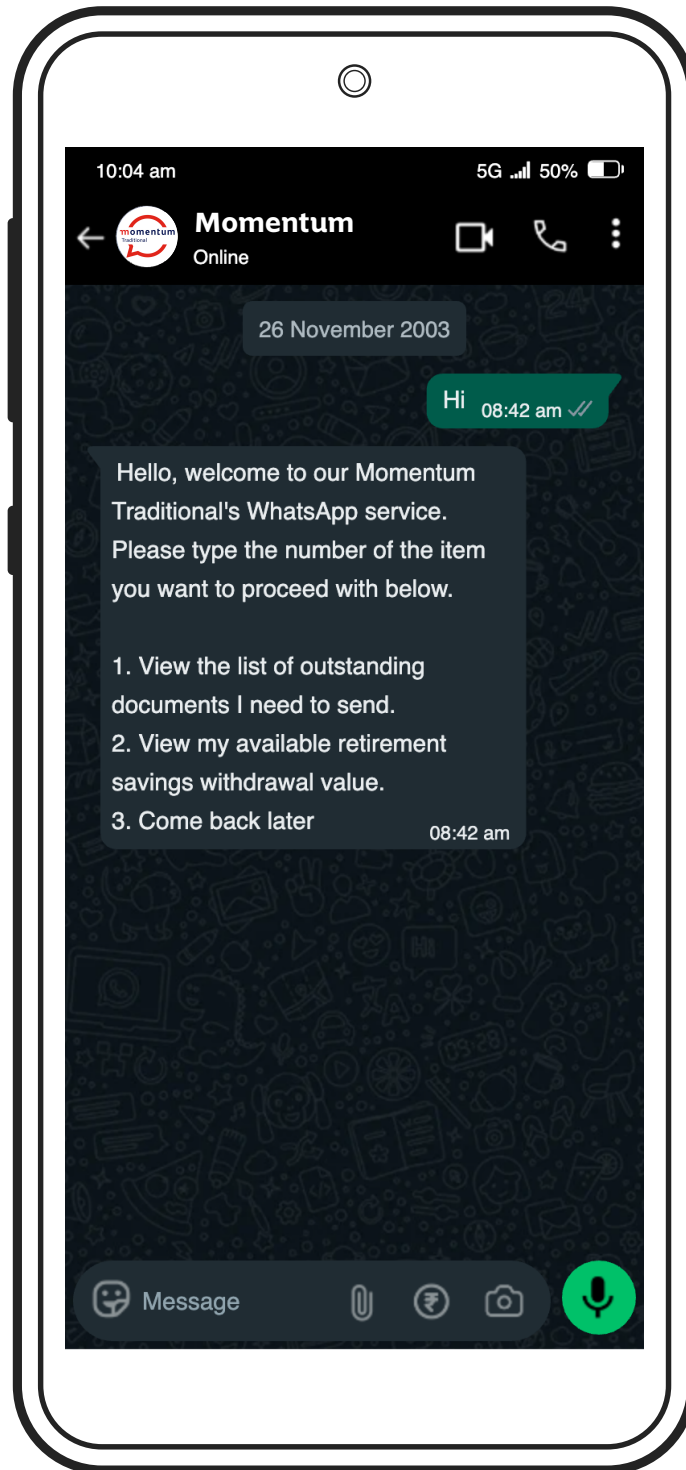
This document will explain how you can send us the documents we need to complete your current instruction.

1. Our security processes ensure your personal details are safe and secure in the chat.
2. This service is only available if you have a current instruction pending with us.
3. Save Momentum Traditional as a contact on your phone before you use WhatsApp services. You only need to do this once.
4. Use the cell phone number we have on record to ensure we receive your documents.
5. Follow the prompts and enter the information or item number to get the help you need.
6. You do not need to send all the outstanding documents in the same session. You can send what you have available now and send the others at a later stage.



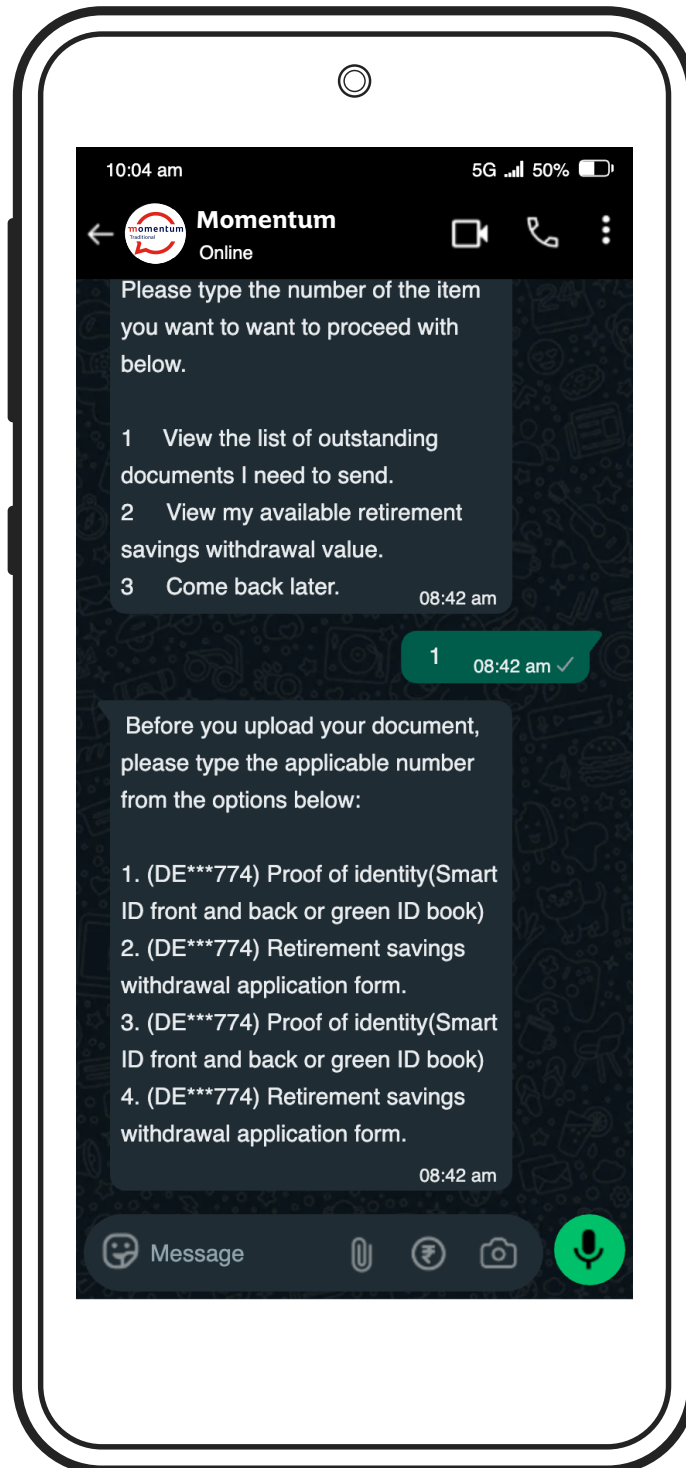
Step 1:

Message “Hi” to **068 707 3271** (Momentum Traditional).
We’ll reply with the menu of available service options.



Step 2:

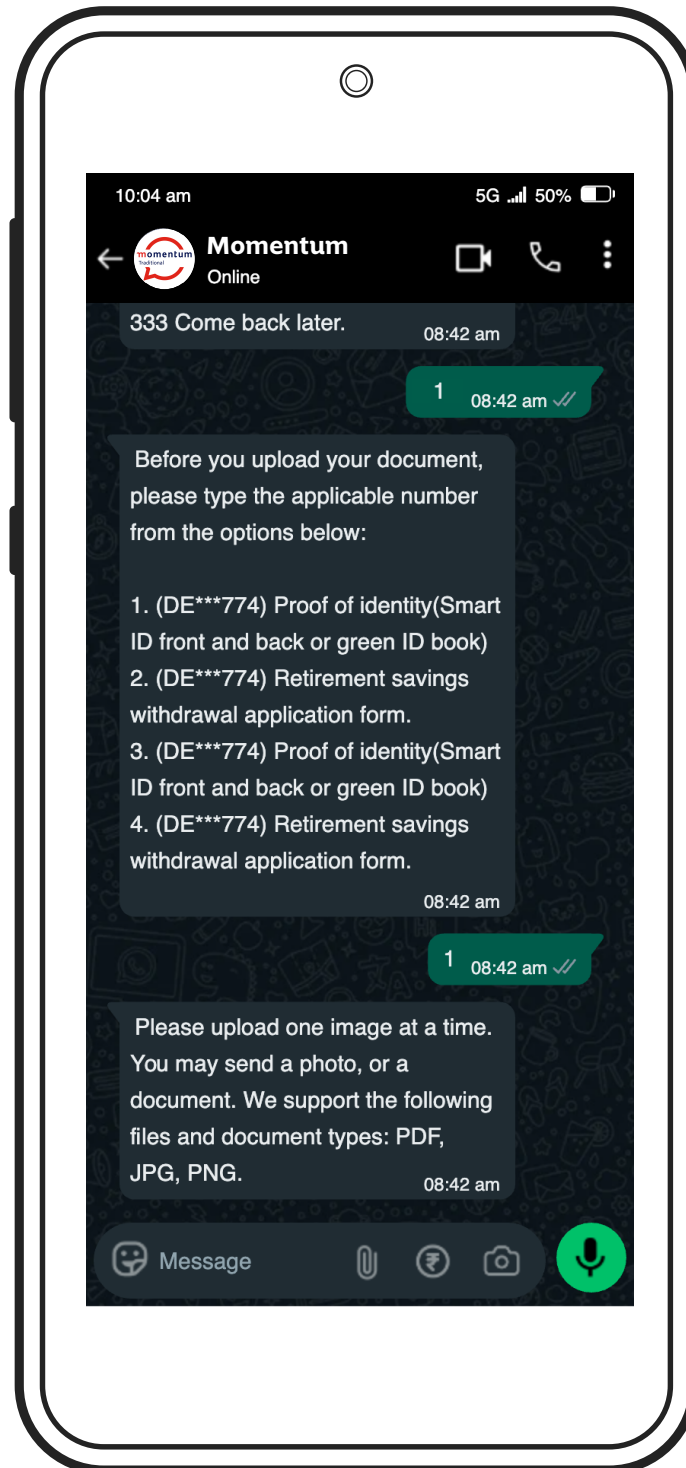
Type “1” to select the menu item “View the list of outstanding documents I need to send”. We'll reply with a list of the documents you still need to submit. The list will show the item number, your protected policy number and the document we need.



Step 3:

To select the document you want to upload, type the item number of the document you want to send. We'll reply in the chat with instructions on how to upload the document and which file types you can use. You can only upload one page at a time, even if the document has more pages. If you select more than one page or photo from your phone and send it in one message, we will only receive the first one.

You can send any of the following document types: **PDF, JPG, PNG.**



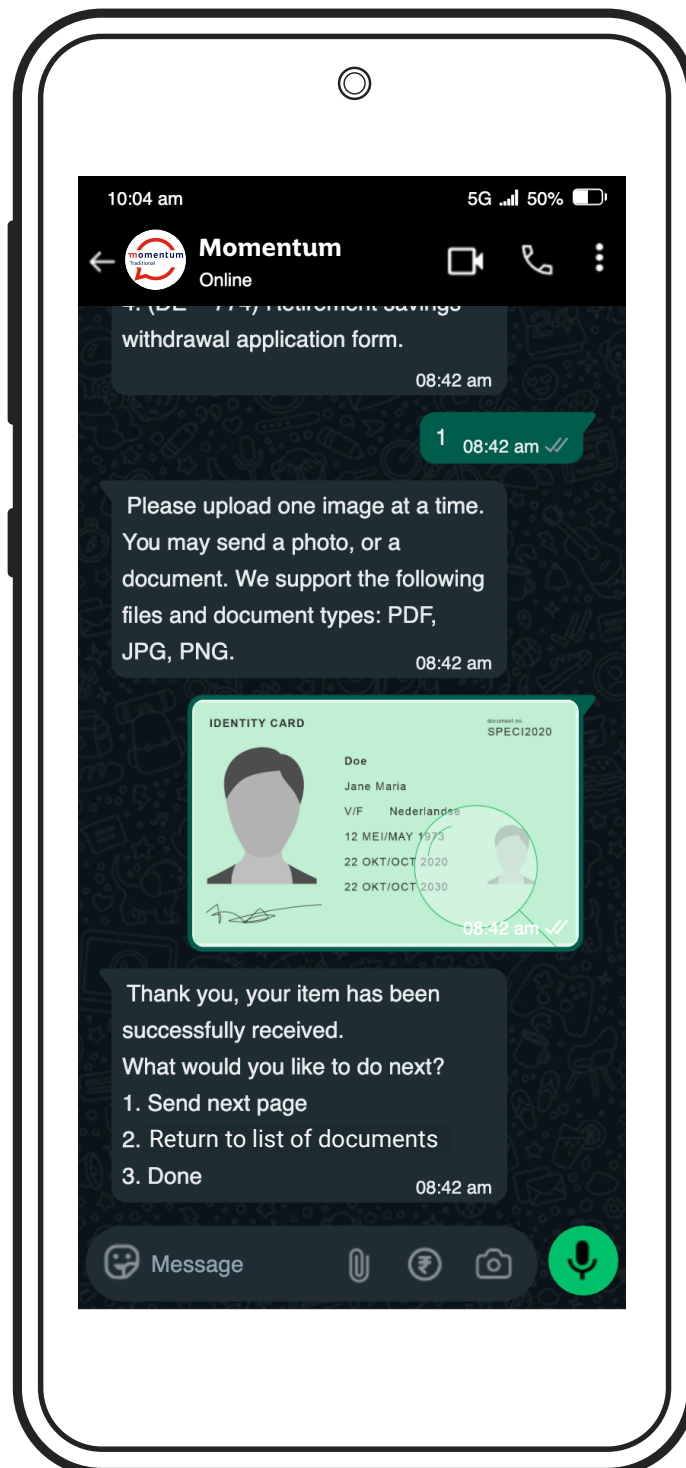
Step 4:

Click on the paperclip icon and select the photo or specific page of the document you want to send. When it shows as loaded in the chat box, click the send button.

We'll reply if the document has been successfully received.

The chat reply will also include more menu options to choose from if you want to:

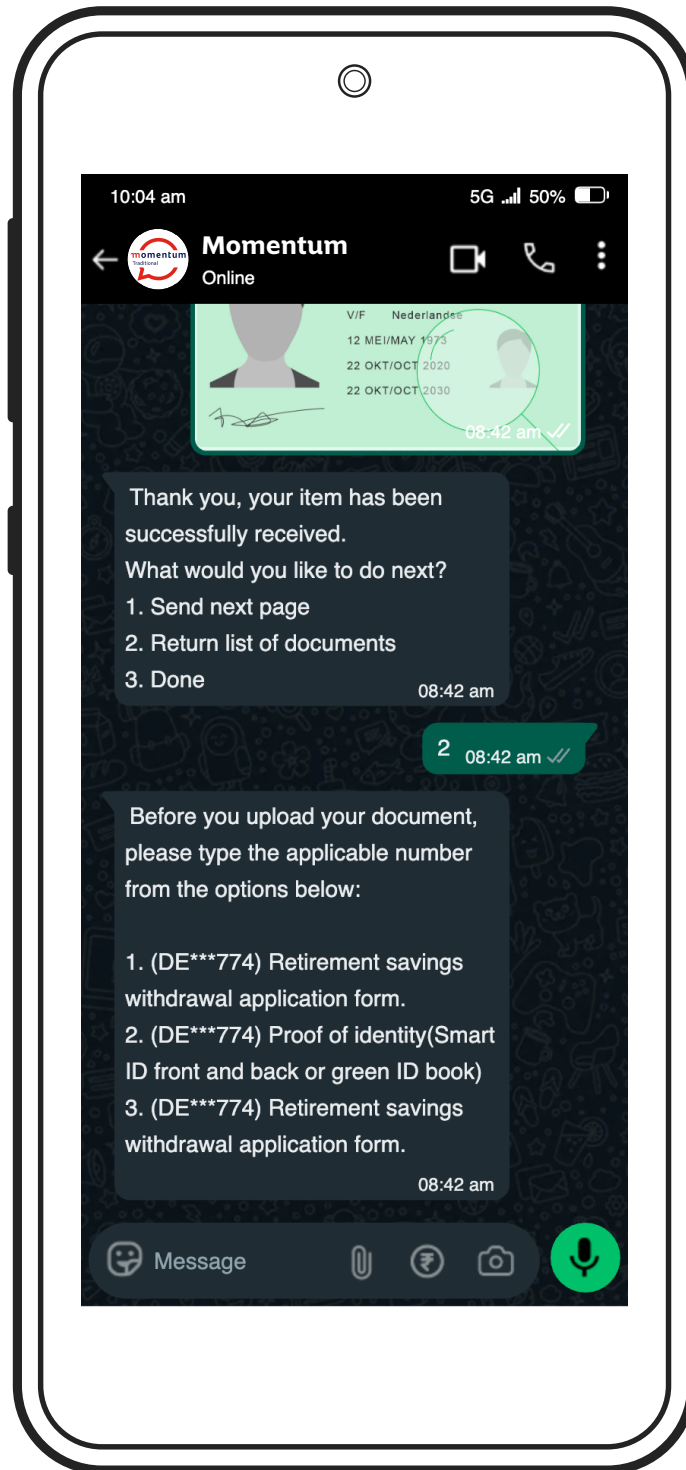
- Send another page.
- Return to the list of outstanding documents.
- Complete your request.



Step 5:

To send another document from the original list, type “2” to select the menu item “Return to the list of documents”.

Repeat steps 3 and 4.



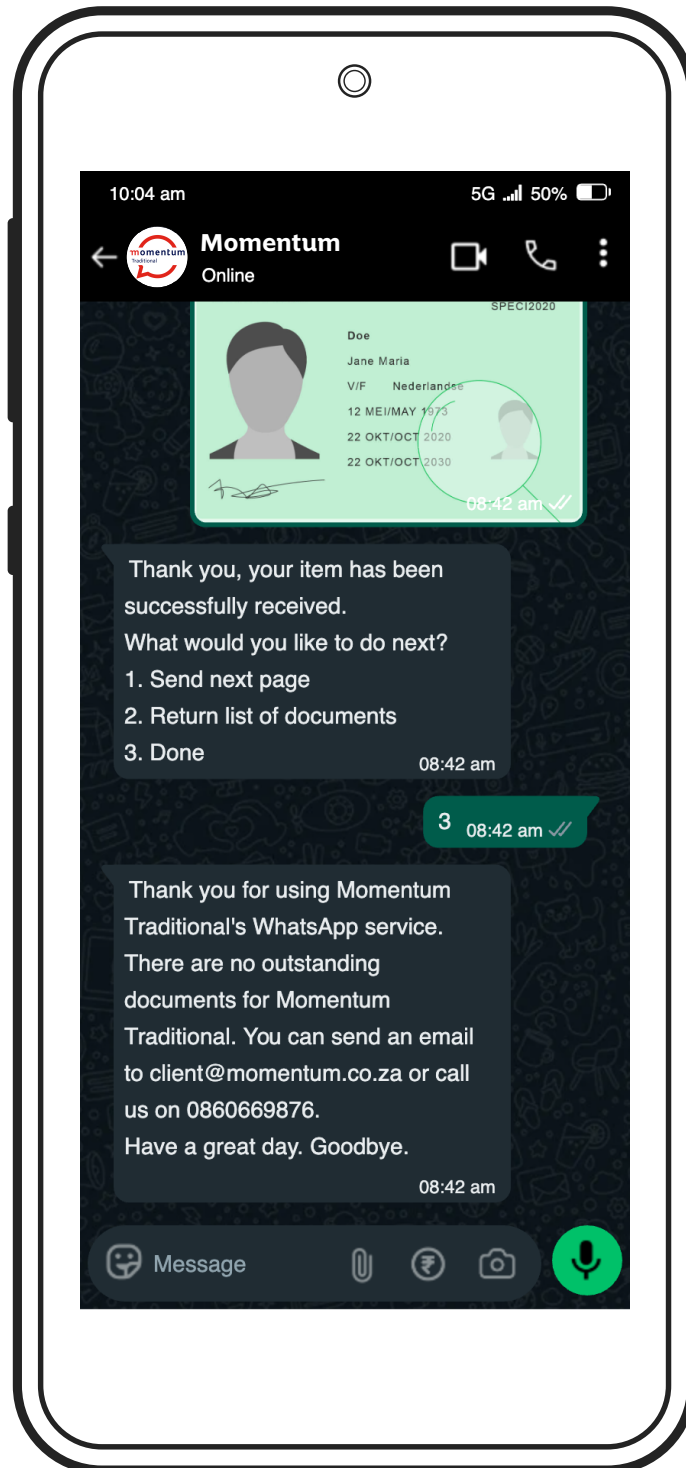
Step 6:

To complete your request to upload documents, type “3” to select “Done”.

You’ll receive a thank you message that includes our contact information.

If you haven’t sent all your documents yet, simply WhatsApp 'Hi' again, like in Step 1, when you are ready to upload more documents.

When all the documents are received, we will respond with a message that there are no outstanding documents for Momentum Traditional.



Get in touch

For more information, you can get in touch with a service specialist.

ShareCall number: 086 066 9876

Telephone number: +27 (0)11 505 1555

268 West Avenue, Centurion, 0157

www.momentum.co.za

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