

HOW TO:

Do a group sale on the  
Simply advisor portal

- With manual  
employee entry

SMART. SIMPLE. SAFE.

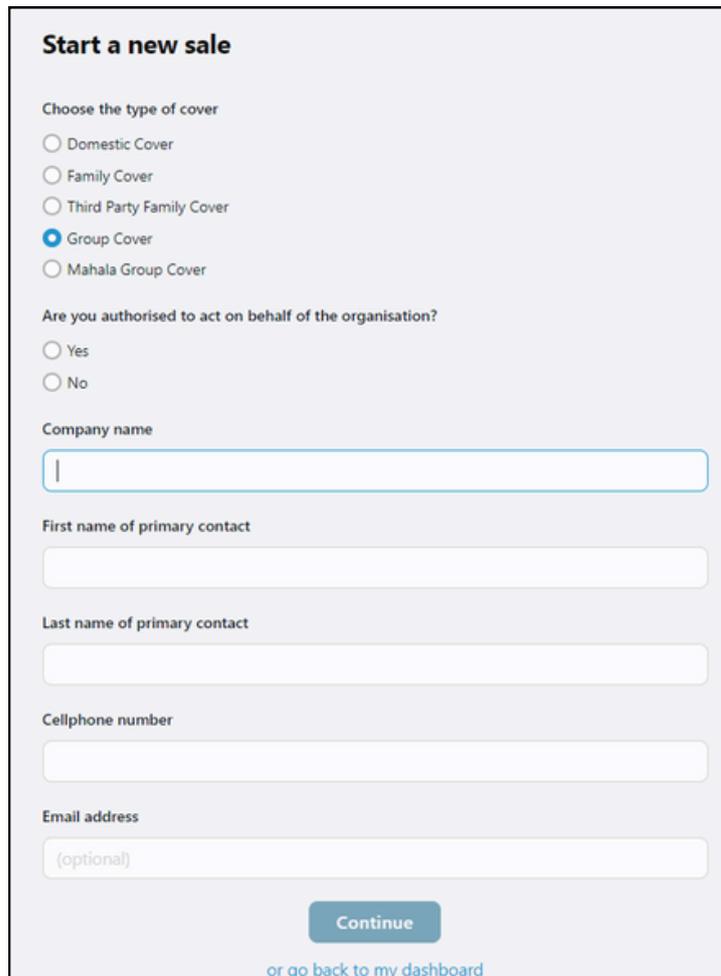


Log in to the advisor portal on [www.advisor.simply.co.za/login](http://www.advisor.simply.co.za/login) and select "start new sale"

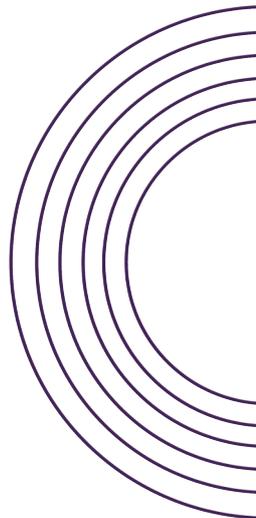


The screenshot shows the 'simply' logo in the top left corner. The breadcrumb navigation reads 'Home / Dashboard'. In the top right corner, there is a blue button labeled 'Start new sale'. Below the logo, there is a vertical menu with the following items: 'Sales', 'View Sales', 'Compliance Documents', and 'Policies'. The main content area features a search bar and three dropdown menus labeled 'Cover type', 'Sale status', and 'Compliance status', each with a '-- None --' selection.

Select the 'Group Cover' option and fill in the required information



The form is titled 'Start a new sale'. Under the heading 'Choose the type of cover', there are five radio button options: 'Domestic Cover', 'Family Cover', 'Third Party Family Cover', 'Group Cover' (which is selected), and 'Mahala Group Cover'. Below this, the question 'Are you authorised to act on behalf of the organisation?' has two radio button options: 'Yes' and 'No'. The form then contains several text input fields: 'Company name', 'First name of primary contact', 'Last name of primary contact', 'Cellphone number', and 'Email address' (with '(optional)' written inside the field). At the bottom of the form, there is a blue 'Continue' button and a link that says 'or go back to my dashboard'.



Choose to cover all employees, or only a certain group. This example is for a full quote



**To qualify for cover, employees must be:**

- 18 to 64 years old.
- Permanently employed or on 6+ month contract.
- Legally employed & actively working 20+ hours a week in SA.

**Who are you planning to cover?**

All your employees, or all your employees in a defined group (e.g. call centre agents, field workers).

Only those employees who want the cover and will pay for it, or those you want to include and pay for (min 5 employees)

**What type of quote would you prefer?**

Quick cost estimate - requires limited info and gives an estimated cost in seconds.

Full quote - requires the name, gender, monthly salary and date of birth of each employee and allows you to buy online if you'd like to.

[Get started](#)

Fill in the required information and click “next”



**Are all the employees you plan to cover permanently employed or on 6+ month contracts, legally employed in SA and working at least 20+ hours per week in SA?**

Yes

No

**Are all the employees you plan to cover currently actively at work? I.e. they are attending to their normal work duties**

Yes

No

**In which province are most of the employees based?**

Western Cape | v

**Which industry is your organisation primarily in?**

Media & Entertainment | v

**Which industry in Media & Entertainment do you work in?**

Ad and other Agencies | v

**Is this policy replacing an existing policy or a very recently cancelled policy?**

Yes

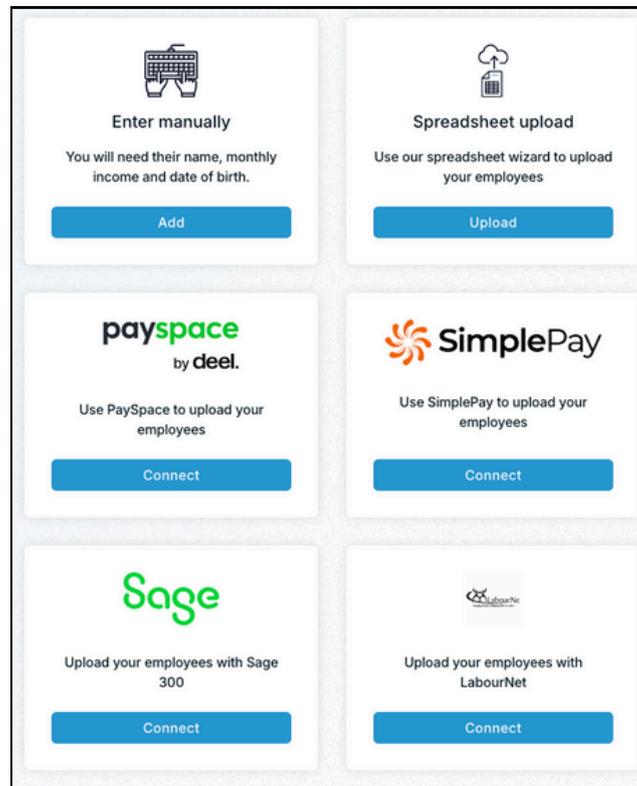
No

**Referral code (if applicable)**

Optional [Apply](#)

[Next](#)

There are multiple ways to fill in the employee information. In this example we're adding employees manually. This option is better suited to a company with fewer employees



Enter your employee details and click “add employee” to add more. Once you’ve added all employees, click “next”

First name

Gender  Female  Male

Monthly income (before tax)

Date of birth (dd/mm/yyyy)

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**You have a total of 2 employees.**

Name	Gender	Income	Date of birth	
Max	Male	18000	01/01/1999	<input type="button" value="Remove"/>
Jane	Female	18000	04/03/1999	<input type="button" value="Remove"/>

Here you will be able to adjust the sliders to change benefits and cover amounts. You can also choose multiple of salary or equal amounts per employee

Multiple of salary Equal amount

For an average of **R111** per employee p/m, each one would get:

**Life cover - 2x annual salary (max R2.5M)**

0.5x annual salary 5x annual salary

0.37% of salary up to a max of R379 per employee p/m\*  
2 employees will be asked medical questions to check if they qualify for full cover.

**Occupational disability cover - 3x annual salary (max R2.5M)**

0.5x annual salary 5x annual salary

0.15% of salary up to a max of R100 per employee p/m\*  
2 employees will be asked medical questions to check if they qualify for full cover.

**Family funeral cover - R20,000**

R5,000 R50,000

**R17.50 per member**

Single Life funeral cover not selected

**Cover summary**

Life	R133 p/m
Occupational disability	R54 p/m
Family funeral	R35 p/m
<b>Total monthly premium</b>	<b>R222 p/m</b>

2 employees - average premium per employee R111 p/m

**Cost per member details**

Life	0.37% of salary up to a max of R379 per employee p/m*
Occupational disability	0.15% of salary up to a max of R100 per employee p/m*
Family funeral	R17.50 per member

\* The premium is capped at this value for employees who have reached the R2.5m max cover limit.

**Important policy features**

There is a 6 (six) month waiting period on disability claims, during which only claims from accidental causes will be paid. Life and funeral claims resulting from both natural and accidental causes will be paid from day 1.

Show employee cover details

Total monthly premium must be at least R299 p/m.  
Please increase your benefits to continue.

Download quote

Choose to manually add the remainder of the information required

**We now need a bit more info about your employees before we continue**

75%

  
**Manually**  
Complete one at a time  
[Add](#)

  
**Upload Spreadsheet**  
Use our spreadsheet wizard to upload your employees  
[Upload](#)

[Download quote](#)

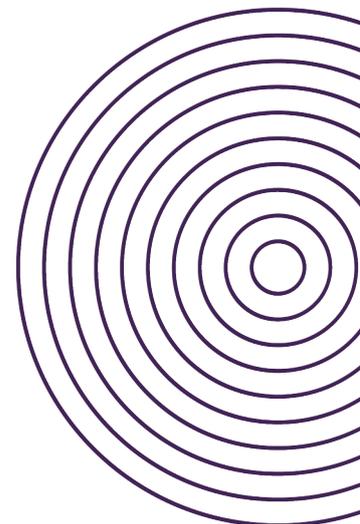
Click "edit" to complete the missing information for each employee

<b>Max</b>	Male	25	R18,000 p/m	foreigner	01/01/1999	<a href="#">Edit</a>
<b>Jane</b>	Female	25	R18,000 p/m	foreigner	04/03/1999	<a href="#">Edit</a>

[Download quote](#)

[Next](#)

Once all information is updated, click next



## Enter the business owner/decision maker's details

**Type of organisation**

Sole Proprietorship

Simply uses information from credit bureaus and other sources to make it easier for you to complete our application forms and to improve the products and services we offer. Do you give us permission to retrieve your consumer credit information as defined in section 70(1) of the National Credit Act and / or publicly available data such as your company's registration details and VAT number?

(You can read more about our data handling in our Privacy Policy)

Yes

No

**Your Details**

**Do you run the organisation?**

Yes

No

**First name**

Stephanie

**Surname**

Wulf

**Date of birth (dd/mm/yyyy)**

13/08/1987

**Cellphone**

0828141872

**Landline**

(optional)

**Do you have a South African ID Number?**

Yes

No

**ID or passport number**

Used as a password for opening documents containing employee details

8708134800085

**What is your nationality?**

South Africa

**Home Address**

Royal Ascot Lane, Sandown, Sandton, South Africa

**Email address for policy document and logging in**

Please note sensitive employee info will be sent to this address

stephi.wulf@gmail.com

**Email address for monthly invoice**

stephi.wulf@gmail.com

## Enter the business details

### Organisation details

If you cannot fill in the information required in this section, please call us on 021 204 7240

What kind of business is this?

Trading name

Sole Proprietor's Surname

Sole Proprietor's First Names

Sole Proprietor's ID number

Business Address

Individual Tax Number

VAT number (if applicable)

## Enter the business details

### Payment details

By clicking Next below, you authorise **The Hollard Life Assurance Company Ltd (Hollard)** to deduct the monthly premium of **R413** from **AMC Investments's** bank account (details below), on condition the amount deducted never exceeds the amount committed to under this policy. This mandate will commence on the debit order date selected below and will continue monthly thereafter until it is terminated by giving not less than one month's notice. The reference number for the deduction will contain the word **SIMPLYSURE**.

You also agree that cancelling this debit order authority will not cancel the agreement you have with **SIMPLYSURE**.

Bank

Bank account number

Bank account type  
 Cheque  
 Current  
 Savings  
 Transmission

Which day of the month should we debit the bank account?

[Download quote](#)

[Next](#)

## Read and accept the T&Cs then request OTP

[Read the full Ts&Cs](#)

You consent to Simply offering exclusive individual benefits to my employees

By checking this box and providing the OTP below, you accept all terms and

conditions and confirm you have read and understood the information and disclosures provided relating to this product

Just a moment please

[Request OTP](#)

## Enter your OTP and you'll get a confirmation of the sale

### Congrats, your employees are now covered

Please see policy details and next steps below

#### Cover summary

Life	5X annual salary* (max R2.5M)
Occupational disability	5X annual salary* (max R2.5M)
Family funeral	R50,000

\* Approximate – as per your schedule

#### Cost per member details

Life	0.82% of salary up to a max of R338 per employee p/m*
Occupational disability	0.2% of salary up to a max of R83 per employee p/m*
Family funeral	R23.00 per member

\* The premium is capped at this value for employees who have reached the R2.5m max cover limit.

## Welcome sms to employer.....

Welcome to Simply - your employees are now covered! Your policy document and schedule have been emailed to [stephi.wulf@gmail.com](mailto:stephi.wulf@gmail.com). Please check your Spam / Junk mail folder if you haven't received it. For any queries, please contact us at [business@simply.co.za](mailto:business@simply.co.za) or 021 045 1513. [www.simply.co.za](http://www.simply.co.za). FSP 47146

## and to employees

Jane, Your employer has taken out an insurance policy for you from Simply. Go to <https://admin.partner-preprod.cloudsure.tech/p/JANJON241112THZS> to complete application. (FSP:47146)



# Thank you!

Contact your broker consultant if you have any queries or need assistance.



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