

HOW TO:

Do a group sale on the  
Simply advisor portal

- With Payspace  
integration

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" and fill in the required information

### Start a new sale

**Choose the type of cover**

☐ Domestic Cover

☐ Family Cover

☐ Third Party Family Cover

☒ Group Cover

☐ Mahala Group Cover

**Are you authorised to act on behalf of the organisation?**

☒ Yes

☐ No

**Company name**

AMC Investments

**First name of primary contact**

John

**Last name of primary contact**

Grobler

**Cellphone (WhatsApp number)**

0828241872

So we can communicate with you on WhatsApp

**Email**

(optional)

So we can email you your policy documents

[Continue](#)

[or go back to my dashboard](#)

Choose which employees you would like to cover

### Let's get started

Get an estimate in seconds or a full quote in minutes

10%

**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.


**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?

National - employees are spread across SA

Which industry is your organisation primarily in?

Administration

Which industry in Administration do you work in?

Financial sector (Banks, finance companies, Insurance, Investment firms)

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

☐ Yes  
☒ No


Referral code (if applicable)


Optional


Apply


Next


Choose how you would like to add the employee information. In this example, we're using the Payscale integration

  
**Enter manually**  
You will need their name, monthly income and date of birth.  
**Add**

  
**Spreadsheet upload**  
Use our spreadsheet wizard to upload your employees  
**Upload**

  
Use PaySpace to upload your employees  
**Connect**

  
Use SimplePay to upload your employees  
**Connect**

  
Upload your employees with Sage 300  
**Connect**

Enter the business owner/ decision maker's details and they'll receive a request to log in to Payspace

Use PaySpace to upload your employees

For businesses that use PaySpace

45%

Send a Login Request

Email

Cellphone number

Send

or go back

Please provide us with the required authorisation to provide you with a quote.

payspace

by deel.

Disclaimer

By logging in with PaySpace, you authorize PaySpace to share relevant company and employee information with Simply Financial Services in order to provide an accurate insurance quote and to ensure your employee and cover details are kept up to date if you sign-up.

Login with Payspace

Once logged in, you can choose which employees should be added to the quote

User login complete

Who would you like to cover?

When should new employees go on cover / be added to the policy?

Immediately

After

0

days

Please select departments you want to sync

Simply - Company

Business Development - Department

Sales Team - Team

Marketing - Department

Online - Cost Center

Sales - Department

Support - Team

HR - Department

Tech - Department

Import Employees

or go back

Employees will be shown here. Click “next” to continue to the customisable quote page

We have imported a total of 53 eligible employees. Unfortunately info is missing or invalid for 1 of them. This will need to be corrected before you can complete your sign-up. You can however get a quote now by clicking the 'Get a quote' button below. [Click here](#) to download a CSV schedule showing the employee data issues.

Get a Quote

Name	Gender	Income	ID Number	Date of birth
Anthony Bridgeton Simply - Tech	Female	23000	8309160188089	16/09/1983

- Cellphone number should be valid.

Name	Gender	Income	Date of birth	
Tsamaya	Female	60000	27/01/1995	Remove
Camila	Female	20000	01/01/1980	Remove
Kevin	Male	20000	01/01/1980	Remove
Deidre	Female	20000	01/01/1980	Remove
Johnny	Male	325000	04/03/1984	Remove
Aria	Female	20000	01/01/1980	Remove
Amanda	Male	50000	01/01/1980	Remove
Ella	Female	20000	01/01/1980	Remove
Pieter	Male	20000	01/01/1980	Remove
Grace	Female	20000	01/01/1980	Remove

Next

Instant, no obligations

or go back

Here you can select multiple of salary of equal cover amounts for all employees.  
The benefit sliders can also be adjusted to change the cover amounts.

Multiple of salary

Equal amount

For an average of **R244** per employee p/m, each one would get:

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

0.5x annual salary5x annual salary

0.52% of salary up to a max of R537 per employee p/m\*  
4 employees will be asked medical questions to check if they qualify for full cover over R1,500,000.  
1 employee has reached the max cover limit of R2.5M

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

0.5x annual salary5x annual salary

0.42% of salary up to a max of R291 per employee p/m\*  
9 employees will be asked medical questions to check if they qualify for full cover over R1,500,000.  
1 employee has reached the max cover limit of R2.5M

Family funeral cover - R20,000

R5,000R100,000

**R15.93 per member**

Single Life funeral cover not selected

Cover summary

Life	R6,640 p/m
Occupational disability	R5,221 p/m
Family funeral	R828 p/m
<b>Total monthly premium</b>	<b>R12,689 p/m</b>

52 employees - average premium per employee R244 p/m

Cost per member details

Life	0.52% of salary up to a max of R537 per employee p/m*
Occupational disability	0.42% of salary up to a max of R291 per employee p/m*
Family funeral	R15.93 per member

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

Important policy features

Your employees get their first R1,500,000 life, R1,500,000 disability and R50,000 family funeral cover without having to answer any medical questions!

There is a 6 (six) month waiting period directly after you've taken out the policy for the disability cover as well as for your employee's spouse and children's funeral cover. There is also a 6 (six) waiting period on all funeral claims for groups of under 5 members, or for any funeral cover above R50,000 for groups of under 20 members. After the waiting period your employee will enjoy full cover. These waiting periods may be waived where the policy is replacing existing cover of an equivalent amount.

Show employee cover details

Download quote

Next

or go back

Next, complete the required information

Type of organisation

Private Company [Pty Ltd]

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

Are you a director or member of the organisation?

☒ Yes  
☐ No

Do you have a South African ID Number?

☒ Yes  
☐ No

ID or passport number

Used as a password for opening documents containing employee details

7304114758690

Fetch details

First name

John

Surname

Grobler

Date of birth (dd/mm/yyyy)

14/07/1973

Cellphone

0828241872

Landline

{optional}

What is your nationality?

South Africa

Home Address

P O Box 67339, Bryanston, 2021

Email address for policy document and logging in

Please note sensitive employee info will be sent to this address

steph@simply.co.za

Email address for monthly invoice

steph@simply.co.za

## Add the organisation and payment details

### Organisation details

Milcock Investments

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

What kind of business is this?

Private Company (Pty Ltd)

Country of Incorporation/Registration

☒ South Africa  
☐ Other

Registered name

Milcock Investments

Trading name

Milcock Investments

Registration no

2000/052693/23

Registered Address

P O Box 920, Stellenbosch, 7599

Physical Address

Provide Head Office address if there are multiple addresses

De Waterkant Building, Helderberg Street, Stellenbosch, 7600

Source of Funds

☒ Company profits  
☐ Investment returns  
☐ Donations  
☐ Government

Company Tax Number

9549059146

Company VAT Number (if applicable)

(optional)

### Payment details

How would you like to pay for this policy?

☒ Debit order  
☐ Direct transfer / EFT

By clicking Next below, you authorise **The Holland Life Assurance Company Ltd (Holland)** to deduct the monthly premium of R12,690 from Milcock 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

Capitec Bank

Bank account number

1234567890

Bank account type

☒ Cheque  
☐ Current  
☐ Savings  
☐ Transmission

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

25

Download quote

Next

or go back

## Read and accept the T&Cs then request the 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](#)

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

**Congrats, your employees are now covered**  
Please see policy details and next steps below

**Cover summary**

Life	2X annual salary* (max R2.5M)
Occupational disability	3X annual salary* (max R2.5M)
Family funeral	R20,000

\* Approximate – as per your schedule

**Cost per member details**

Life	1.93% of salary up to a max of R2,010 per employee p/m*
Occupational disability	2.28% of salary up to a max of R1,583 per employee p/m*
Family funeral	R40.70 per member

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

**Policy details**

Your total premium is R5,911 p/m. When your first debit order occurs you will see the shortcode SIMPLYSURE on your bank statement. Your invoice will be sent shortly.

Your policy number is JCPLUMBING26260. You should use it when communicating with us.

Your policy documents should be emailed to you within two working days.

**Employee assistance benefit**

Holland has contracted with Reality Wellness, an authorised employee psychosocial and wellness programme provider, to offer psycho-social support to employees who are covered under the Simply Staff Cover product. Please follow this [link](#) to view the programme guide.

**What happens next?**

Your employees have been sent an SMS with a link that allows them to enter the details of their beneficiaries and the family members covered by their funeral plan (if applicable). Please let your employees know you've taken the policy and encourage them to give us the information we need. If they don't, there may be complications if there's a claim.

Your employees get their first R0 of cover without having to answer any health questions. Employees who get more than this will have to answer a few simple health questions before they get full cover for the amount above R0. Until then, they get accidental only cover for that portion.

The employees who need to answer health questions are: Betty Dube, Lilly Smith, Minnie Mouse, John Stevens, Shawn Smith.

The following employees have reached our cover limit of R2.5m, so their cover will be less than the selected multiple of salary (they are eligible for up to R2.5m in additional cover through our retail product – we will contact them to see if they would be interested):  
John Stevens

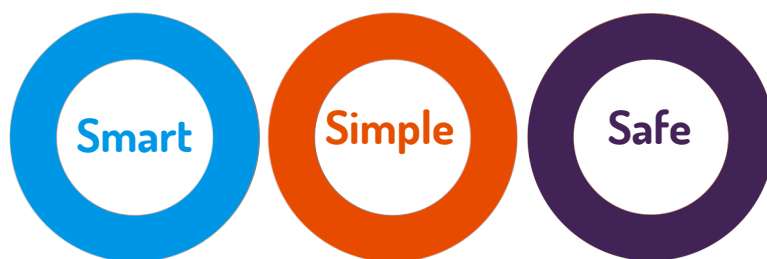
**Questions?**

For your convenience, we've put together a list of the FAQs we get from both employers and employees:

- [Employer FAQs](#)
- [Employee FAQs](#)

We'd encourage you to review the Employer FAQs – they cover important issues like the impact of the policy on employee tax (PAYE) and how to add and remove employees. We'd also encourage you to distribute the employee FAQs to your employees.

Please contact us on 021 045 1513 if you have any questions that aren't covered by the FAQs.



# Thank you!

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



Simply Financial Services (Pty) Ltd is a registered financial services provider (FSP 47146). T&Cs online.



Holland Life Assurance Company Limited (Reg No. 1993/001405/06), a Licensed Life Insurer and an authorised Financial Services Provider