



Sanlam Corporate Investments E-nnuity Guide

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Financial Planning | Retirement | Insurance | Health | Investments | Wealth | Credit



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Introduction

Since 2008, Sanlam Corporate's life annuity quotations tool has added immense value for both intermediaries and the business.

Unfortunately, over the years, the system's architecture has become obsolete and the opportunity for system enhancements were limited.

In 2023, we embarked on a journey to improve our user experience through modernising the underlying architecture, improving the look and feel of the main user interface and enhancing certain functionalities.

We're excited to introduce the latest update to our quote's portal. In this video, we'll walk you through the new and improved user interface, designed to enhance your experience.





Overview of Changes:

Old UI:

E-nnuity from Sanlam Corporate Investments

E-nnuity home Individual quotation Search Product details Admin Help Contact us

User testbroker2 (Test Id) Role <Broker> Search

Quotations Tasks Policies

Quotations

	Date created	Quotation number	Status	Retirement fund	Individual	Task age	Last step	Last calculation date		
<input type="checkbox"/>	2022/10/23	QIB000000446135	Completed	#TEST Fund	#Lence #Murray	8	N/A	2022/10/23		
<input type="checkbox"/>	2022/10/22	QIB000000446118	Completed	#TEST Fund	#Morne #Jansen	8	N/A	2022/10/22		
<input type="checkbox"/>	2022/09/06	QIB00000044172	Completed	#TEST Fund	#Japie #Louw	54	N/A	2022/09/06		
<input type="checkbox"/>	2022/08/16	QIB00000043165	Completed	#TEST Fund	#Jonas #Marais	75	N/A	2022/08/16		
<input type="checkbox"/>	2022/05/18	QIB00000039756	Completed	#TEST Fund	Nolan Wolff	165	N/A	2022/05/18		
<input type="checkbox"/>	2022/03/31	QIB00000038616	Completed	#TEST Fund	#Rhodes	213	N/A	2022/03/31		
<input type="checkbox"/>	2022/02/21	QIB00000037054	Completed	#TEST Fund	#Peter #Bain	252	N/A	2022/02/21		
<input type="checkbox"/>	2022/02/10	QIB00000036637	Completed	#TEST Fund	#Manie #Gertse	262	N/A	2022/02/10		
<input type="checkbox"/>	2022/02/03	QIB00000036275	Completed	#TEST Fund	#Daniel #Peters	269	N/A	2022/02/03		
<input type="checkbox"/>	2022/01/20	QIB00000035616	Completed	#TEST Fund	#Nfred #DeVries	283	N/A	2022/01/20		
<input type="checkbox"/>	2021/12/15	QIB00000034218	Completed	#TEST Fund	#Ernest #Gls	219	N/A	2021/12/15		
<input type="checkbox"/>	2021/12/15	QIB00000034217	Completed	#TEST Fund	#Ernest #Gls	219	N/A	2021/12/15		

New UI:

Quotations

+ New Quote

Search

Quotation Number	Date Created	Created By	Status	Retirement Fund	Individual	Task Age	Last Step	Last Calculation Date	Actions
QIB00000079007	2024-07-08	Albi Test	Accepted	#TEST Fund	vuddy sfsav	1	policyContract type	2024-07-08	

< Prev

1

Next >

Actions

Under the Actions column on the far right, take note of the “eye” icon. This is to view the **Quote Summary**.



Quote Summary:

The advantage of this feature is that one can see a quick summary of information related to the quote without having to extract any documents or navigate into the Quotes program further.

Quote summary: QIB0000021076

Guaranteed Escalation	
Purchase price	R 700,000.00
Monthly pension	R 3,431.09
Rate	10.00% per annum
Rate type	Fixed growth rate
Status	Completed

The clustered personal information screen in the old UI has been simplified and split into cleaner “card” style input screens depending on the type of quotation starting with the calculation parameters followed by the personal details’ screen.

All the input validations done in the previous UI will also be done in the new UI.



New UI calculation parameters page:

Calculation Parameters

Select calculation type

☒ Pension payment

☐ Purchase price

Purchase price

R 3000000

Three million

First pension payment date

July 2024

☐ Joint life

Guarantee period since date of retirement

5 years

Commission

1.5

%

Maximum 1.5%

Pension payment timing

In Arrears

Bonus payment type

None

The common parameters button in the old UI has been replaced by a quotation details screen and all the inputs and options are now visible when the screen is activated.



Stepper:

Expanding the stepper will indicate where you are in the process, as well as additional steps to follow. **The step that you are currently on will be highlighted in light blue (See Calculation Parameters screen on the right). Click on the icon to expand.**

Note that you cannot jump forward as the steps need to be completed sequentially, but you are able to jump backwards to a particular menu. This is especially important when requoteing. Since there is already existing data from the original quote, you can then move forward until the Product selection page where a Recalculation will be required to progress to the Output. However, with a new quote you are not able to step forward except by clicking on the Next button. When a Requote is done, a new quotation number is allocated to the quote.

Calculation parameters

1. Calculation parameters

Annuitant information

1. Personal details
2. Spouse details
3. Retirement details

Product selection

1. Product selection

Quote output

1. Quotation summary

New UI pensioner details and spouse's detail pages:

Personal Details

Title

Mr

Full Name

Arthur Murray

SA ID number

5901015800083

Date of birth

1959-01-01

Date format: YYYY-MM-DD

☒ Male

☐ Female

Spousal Details

Date of birth

1957-12-01

Date format: YYYY-MM-DD

☐ Male

☒ Female

Reduction ratio on death of main member

75%

If the quotation is for a joint life, the spouse's detail input screen will be visible.



New UI

retirement details page:

Retirement Details

Date of retirement
May 2024

Gross monthly salary
R 27900

Gross monthly salary in the month prior to retirement

Additional gross monthly income
R 0

FSCA Fund registration number
00000

Lookup code

#TEST Fund

☐ Would you like to override FSCA Fund registration number?

Our updated navigation screens are now more organised, making it easier to enter the necessary information for the quotation.

You can access our full range of products with fewer clicks.



New Product selection pages:

Product selection

To add products

Inflation-linked

With-Profit

Guaranteed Escalation

Provider

Complete Picture

Alexforbes With-Profit

Add

Product selection

To add products click the button below.

Inflation-linked

Annual growth rate

CPI + x%

Additional percentage

0

%

Pension growth month

March

First growth is:

Full

Pro rata

Guaranteed escalation

Fixed annual growth rate

5

%

Pension growth month

March

First growth is:

Full

Pro rata

On the Product selection screen, a summary of all products selected are listed. You can still add as many products as you would like to the current quotation.

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New Product selection pages (cont.):

Product selection

To add products click the button below.

Guaranteed Escalation

Fixed growth rate
5.00% per annum

Inflation-linked

Annual growth rate
(100% of CPI) lagged by 4 months plus 0.00%

+ Add a product

Cancel

+ Add

+ Add a product

Performance has been a top priority. You'll experience faster load times and smoother transitions, ensuring a more seamless interaction with our portal. Calculation speed has also improved.

The Calculate button:

The quotation output screen has been simplified but still contains all the important elements included in the previous UI.

An immediate recalculation can be done by changing one or more of the values in the boxed fields.

Back

Calculate



New Quotation

summary pages:

Quotation output

Please take a moment to double check the details before you generate the quotation.

Quotation summary

Purchase price

R 5808342

Payment month

July 2024

▼

Commission

1.5

%

Maximum 1.5%

Calculated values

Product	Rate type	Rate	Back-dated lumpsum	Pension payment
<input type="checkbox"/> Guaranteed Escalation	Fixed growth rate	<div>Annual growth rate</div> <div>5</div> <div>%</div>	N/A	R 43,347.79
<input checked="" type="checkbox"/> Guaranteed Escalation	Fixed growth rate	<div>Annual growth rate</div> <div>7</div> <div>%</div>	N/A	R 37,009.24
<input type="checkbox"/> Inflation-linked	Annual growth rate (100% of CPI) lagged by 4 months plus 0.00%	<div>Fixed inflation loading</div> <div>0</div> <div>%</div>	N/A	R 34,698.15

Recalculate

Generate final quotation

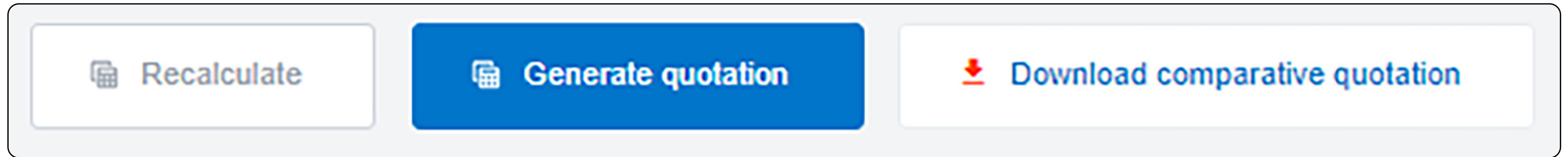
Re-quote

Accept quote

The quotation document can be generated and downloaded for discussion with the retiree. A requote can be done after the quotation is generated.

Active buttons

Active buttons after calculation:



- The final quote can be accepted by ticking the box next to the quote if multiple products were added.
- If a single product was added, then no tick is required.
- Only the final quote can and must be accepted by clicking on the Accept quote button.
- Everything you need is just a click away.



The complete acceptance screen:

Finalise policy details

CancelSave & ExitReject policyComplete

Quote numberQICS96898658

Generated quoteQuotation document

Created2023-06-06 by Michael Pretorius [EC68762847]

Last updated2023-06-06

Policy number[Unsaved]

Task ownerMichael Pretorius [EC68762847]

Status

Pension informationPolicy informationSupporting documents

Annuitant

TitleMr

Full name(s) as per IDJoseph

SurnameJones

South African ID number5606060989090

Date of birth1956/06/06

Email addressjj@gmail.com

Fund membership number65678768

Tax reference number65678768

Spouse

NameJane

SurnameJones

SA ID number5606060989090

Date of birth1956/06/06

Residential address

Street name and number1 Hope Street

SuburbDurbanville

City/TownCape Town

CountrySouth Africa

Postal code7550

Bank details

Bank nameABSA

Account typeCheque

Account number587657698

Branch code025089

Branch nameCape Town

On the complete acceptance screen, the pensioner’s information must be entered in the fields provided.

Information entered on this screen must reflect 100% and verbatim what is on the FICA documents.

Any differences will result in the quote being rejected since the information entered will be used as is in the policy contract.

Click on the Complete button after populating all the fields. The last step in the complete acceptance process is to upload the required supporting documents to the system using the drag and drop functionality for a quick upload.

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The upload FIICA and other required documents screen:

Review policy contract

Quote Number

Generated Quote

Created

QIB0000151033

[Quotation document](#)

2024-10-10 00:00:00 By Ennbrokertwo

Policy Number

Generated Policy

Task Owner

Pension information

Policy information

Supporting documents

Upload supporting documents

List of documents needed to complete the application:

1. supporting-document

2. bank-statement

3. certified-copy-of-identity-document

4. certified-copy-of-spouses-identity-doc

5. email-address

6. marriage-certificate

7. proof-of-address

8. proof-of-income-tax-refnumber

9. proof-of-salary

Upload icon

Drag and drop file or upload a file

Accepted .pdf

Maximum combined file size: 5 MB

UL Doc6.pdf

93.4 KB

supporting-document

Send file to admin

Rest assured, security remains a top priority. We’ve strengthened our security measures to protect your data. Our support team is always here to help you with any questions you have or issues you might encounter.

Explore the new and improved E-nnuity UI today! We’re confident you’ll love the changes.

If you already have an active account, visit <https://e-nnuity.sanlam.co.za> to get started, and don’t hesitate to reach out with any feedback. Thank you for choosing Sanlam Corporate!

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Sanlam Life is a Licensed Life Insurer, Financial Services
and Registered Credit Provider (NCRCP43).

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