



CO-BROWSING VIA THE INVESTMENT HUB OR INTERMEDIARY WEB

CO-BROWSING

The Co-browsing functionality can now be accessed via the Intermediary web or the Investment Hub. Once logged in to Sanport, click on the Online support menu bar on the Glacier landing page to select either the Investment Hub or the Intermediary web.

User: Intermediary / assistant

Consultant: Glacier representative (call centre agent / BDM / BDC)

The intermediary may log in to the Investment Hub or Intermediary web and then require support from a Glacier representative.

Click Online Support:

Summit Intermediary 2022 R2 Sp | Overview dashboard - Overview | SanPort - Home | Glacier | Home

sanport-tst.sanlam.co.za/glacierweb/fspweb/

glacier by Sanlam

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Type in client name, ID, investment no., etc.

BOOK SUMMARY as at 2022-03-15 12:01

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Glacier Financial Solutions (Pty) Ltd. | A member of the Sanlam Group | Private Bag X5 | Tyger Valley 7536 |
Email client.services@glacier.co.za | Tel +27 21 917 9002 / 0860 452 364 | Fax +27 21 947 9210 | Web www.glacier.co.za |
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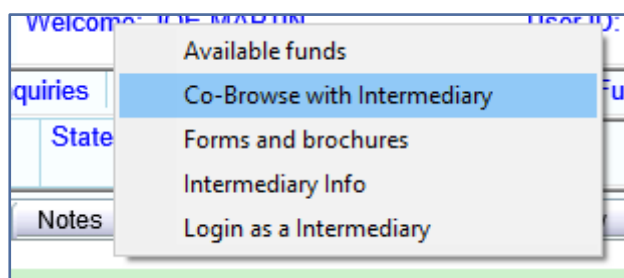
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Or Investment Hub:

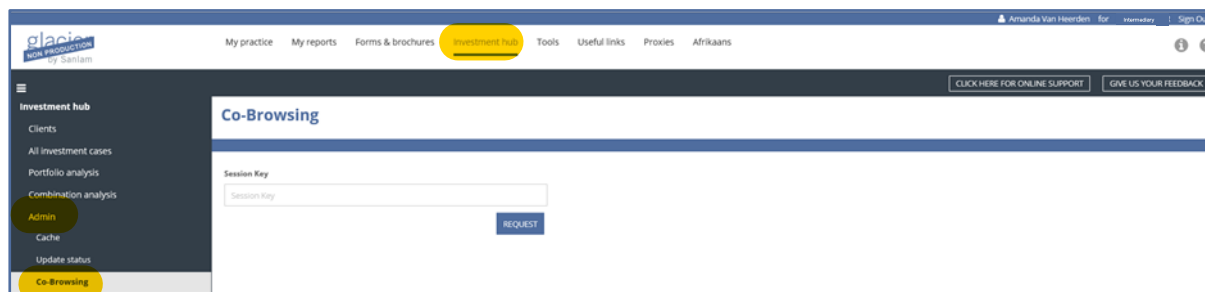
The intermediary will phone the Glacier call centre and be directed to an available consultant.

The consultant will have the opportunity to ask whether the intermediary would prefer assistance by making use of a Co-browsing session.

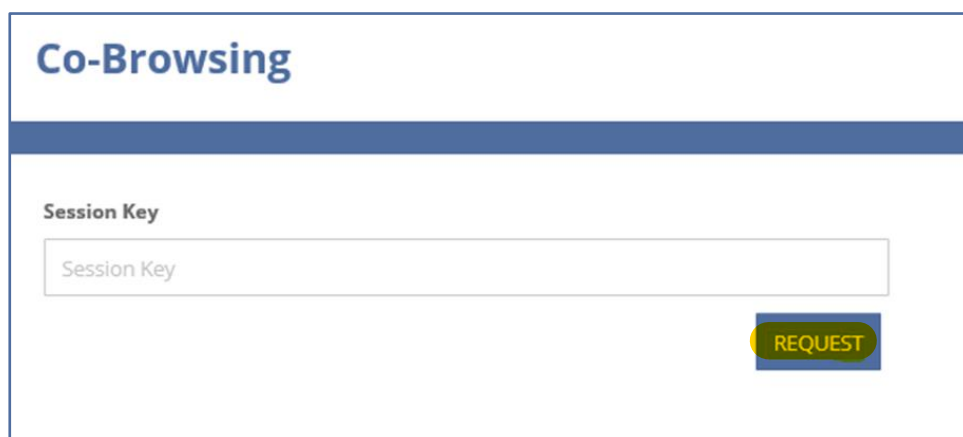
The intermediary will have to agree to this telephonically and the consultant will log in on Inpulse as an internal user and select 'Co-Browse with Intermediary' under the 'Intermediary enquiries' menu item:



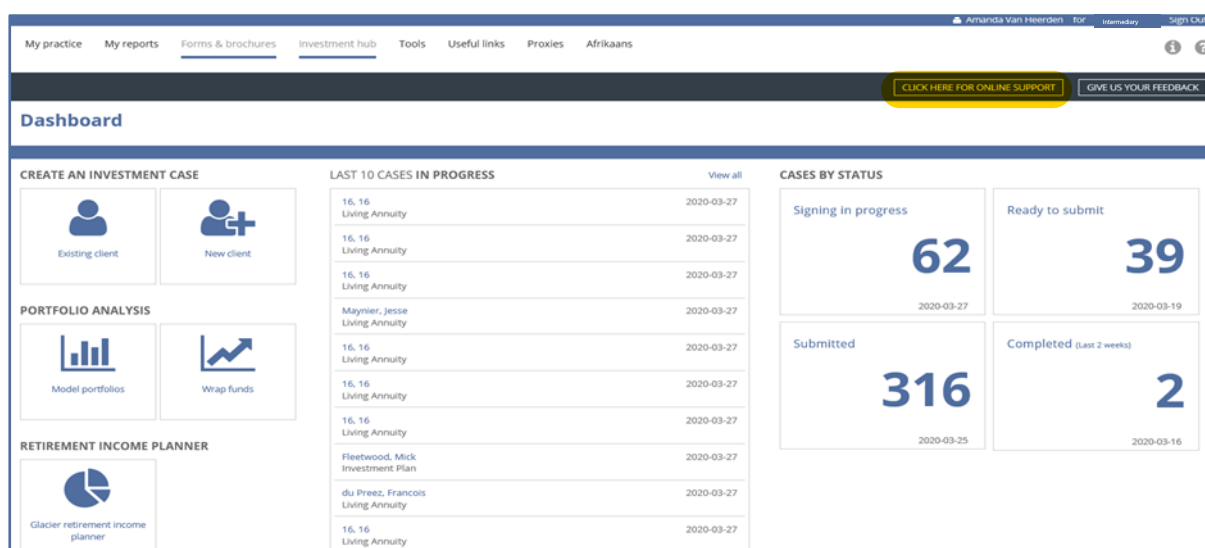
The consultant will land on the page below, from where the 'Co-Browsing' option must be selected on the left-hand menu:



The consultant will click on the 'Request' button to retrieve a session key:



The consultant will guide the intermediary telephonically to click on the 'Click here for online support' button. (If the intermediary clicks on this button when no call was initiated there will be a notification for them to contact the Glacier call centre on 021 917 9002.)

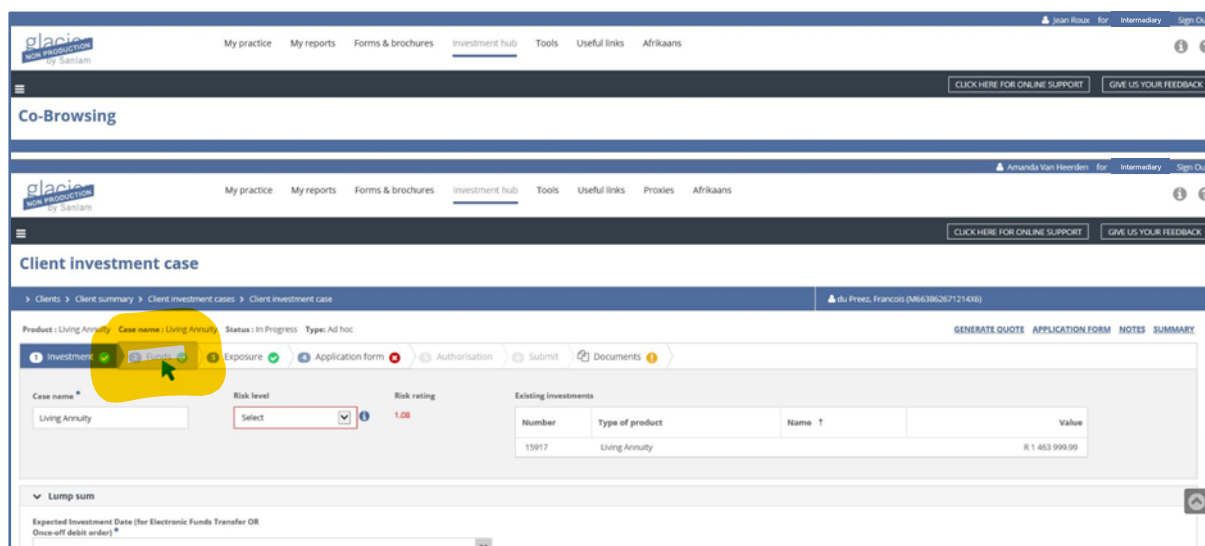


Once the intermediary clicks on the button, a pop-up will appear, prompting them to capture their name and the session key (which the call centre consultant will share telephonically). This session key is an 8-digit code with a space between the first and last four digits, e.g. 1234 5678

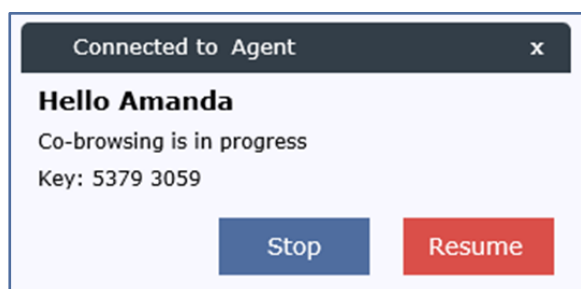
The intermediary captures the session key provided by the consultant and clicks on the 'Connect' button to start the co-browsing session. This session key is specific to the current session:

The intermediary will see the pop up below as notification that co-browsing is in progress. There is an option to stop or pause the session:

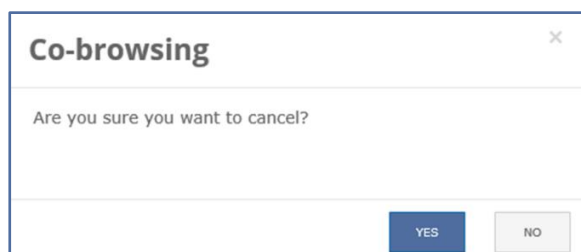
The consultant will now be able to see the intermediary's or assistant's Investment Hub or Intermediary web screen only and will be able to follow the movement of their mouse pointer. The fields the intermediary is on will be highlighted in grey:



If the intermediary wishes to pause the session at any time, the 'Pause' button should be pressed and if the session should be resumed, the 'Resume' button can be pressed:



If the intermediary wishes to end the session, the 'Stop' button can be pressed, and the following pop-up will appear on the screen:



If the intermediary selects 'Yes', the co-browsing session is ended from both their and the agent's side. If the intermediary selects 'No', the co-browsing session continues.

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