

What's available online

Odyssey Financial Advisor screens

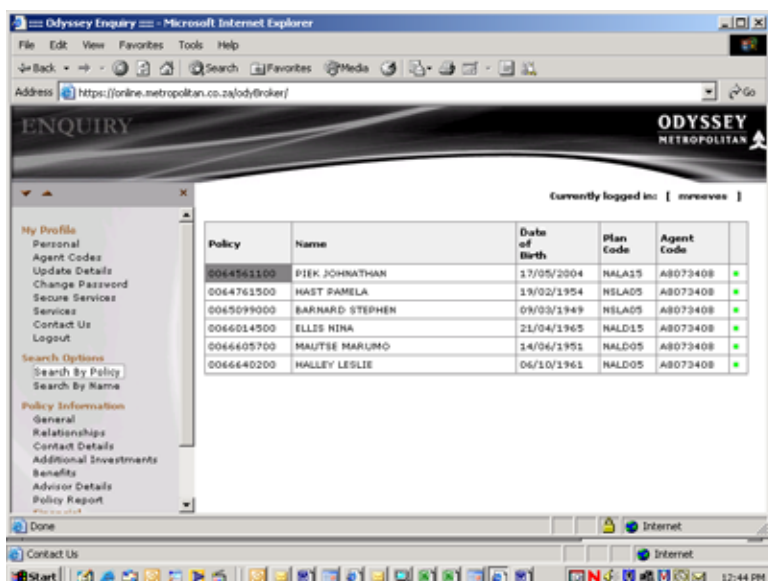
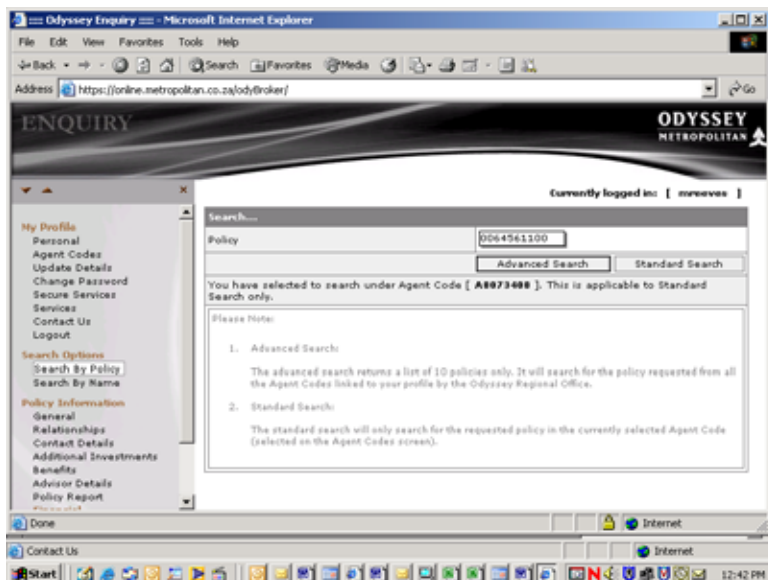
My Profile

MY PROFILE	FUNCTION	ADDITIONAL NOTES
Personal	This screen shows a list of the Financial Advisor's general information like their contact and banking details currently on our system.	
Agent Codes	View all the financial advisor codes that are linked on our web. In order to access ALL the information on written business, please the Broker must contact their BDC to link any outstanding codes.	See How to link Broker Codes *
Update Details	Update contact details online including User Details and Contact Details	Using the Metropolitan Update Details page.
Change Password	Alter your password frequently to safeguard access to your information	
Secure Services / Services	Get access to and apply for all the other online services on offer on the Metropolitan Secure Services site. Just click the tick boxes and submit to subscribe!	Secure Services goes back to the Checkerboard. Services go to the Metropolitan Application for Services page.
* HOW TO LINK BROKER CODES?	<p>Why registered online Brokers cannot see ALL their clients' information.</p> <p>How to do this?</p> <p>Follow these links:</p> <p>On http://10.96.200.47/Index.htm (On the Odyssey Intranet site)</p>	<p>Over time business may have been written for Odyssey using a number of different Agent Codes (old Protea, old CU, new Odyssey, A and X Codes).</p> <p>Most brokers have written business on more than one code. When they register online, they will only see business issued under the particular code used in the registration process. In order to see their entire client portfolio, we need to link ALL their codes on our system.</p> <p>The Broker's BDC should submit a formal request via the Odyssey Intranet.</p> <p>Operations / Intermediary Services / Broker Relationship Administration</p> <p>Request Linking of Odyssey Broker Codes</p> <p>Follow the simple process and SUBMIT.</p> <p>Odyssey Intermediary Services will confirm with the BDC once done.</p>

Odyssey Financial Advisor screens

Search Options

SEARCH OPTIONS	FUNCTION	ADDITIONAL NOTES
<p>Search by Policy</p>	<p>On entering a policy number, a list of policies will be displayed with the selected policy number on top.</p> <p>The advanced search will return a list of 10 policies from all the advisor codes linked to their portfolio.</p> <p>The standard search returns a list of 10 policies in the currently selected advisor code.</p>	<p>Advanced Search automatically searches under all the linked agent codes (3 in this case).</p> <p>Standard search only under the selected agent code.</p>
<p>Search by Name</p>	<p>On entering a client's name, the search results will list all the policies linked under that name.</p>	<ul style="list-style-type: none"> • Red Dots indicate closed / surrendered policies / not in force • Green dots open / in force policies



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Policy Information

POLICY INFORMATION	FUNCTION – All the policy details at a glance	ADDITIONAL NOTES
General	When you select a policy by clicking on the policy number, this screen shows general policy information about the life insured and the insurance contract.	
Relationships	This screen shows all parties with an interest in a policy. The life insured is always reflected while the beneficiaries, payers and owner will only be listed if they are included in the contract or differ from the life insured.	
Contact Details	Easy access to the contact details of the parties listed under Relationships.	
Additional Investments	Any additional investments for the life insured are reflected here.	
Benefits	This function lists all the benefits available under a selected policy, the benefit terms and the sums insured.	
Advisor Details	This screen will list the advisor's detail who implemented the policy.	
Policy Report	This screen helps preparing a personalised fax, with customer information and investment detail and exports it as a pdf document, ready to send or email	

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Financial

FINANCIAL	FUNCTION – no need phone in. Don online checks yourself	ADDITIONAL NOTES
Payment Detail / Payment History	Displays a policy's operational debit order details and last 12 payments for quick reference and trouble-shooting.	
Portfolio	<p>This screen shows where future recurring premiums will be invested and where a single premium was invested.</p> <p>Online switches between portfolios are available to customers for selected Odyssey plans</p>	Brokers are unable to switch online. They should contact Technical Department (Shaun Cerff) for a manual switch.
Income Funds selected (Only on Living Annuities)	You can view funds selected for income draw down on Odyssey Living Annuities.	
Expense Funds selected (Only on Living Annuities)	You can also view from where expense deductions are paid on Odyssey Living Annuities.	
Switching	This switching option shows a screen with the number of existing units at the current unit price and the total rand value. (Customers are able to switch funds online)	Only Clients can switch online!
Loans	Shows loan, the start date, interest rate and outstanding balance taken with the Odyssey policy as security.	
Current Values	<p>This screen helps you prepare and print current policy values.</p> <p>The produced document is in pdf format for easy printing or emailing - a great help for a Broker!</p>	Click on Process Request. Click on Open. A pdf file will open in a new window.
Projected Values	<p>This screen prepares and print projected policy values.</p> <p>You have the option to illustrate values at future ages or terms.</p> <p>The produced document is in pdf format for easy printing or emailing</p>	You have the option to include AIB, future AIB up to a max of 20%, ages or terms, or a range of 5 different range options. See example Projected Values
Portfolio Statements	Here you can get a detailed list of all transactions for the period you specify on investments in the Odyssey Investment Plan range.	Enter a start and end date and click on Process Request.

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Annuities

ANNUITIES	FUNCTION	ADDITIONAL NOTES
General	This screen shows general contact details of the annuitant.	Only applicable for Odyssey Living Annuities
Payment Details	Displays the banking details to where the annuity income is paid.	
Living Annuities	Easy access to the living annuity details.	
Conventional Annuities	This screen shows the conventional annuity details.	
Payment History	Displays all the payments that the customer has received, less tax deduction and investment review fee.	

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Print Options (All pdf files)

PRINT OPTIONS	FUNCTION	ADDITIONAL NOTES
My Customers	Prints a pdf list of all the policies linked to the selected financial advisor's code.	Use this link for a Broker entering the site for the first time. Click on a Broker Code and then click on My Customers. This will print a pdf document of all the business written under the selected code. Advise Broker to do this for all agent codes and to keep on file.
Future Commission	Lists financial advisor's future commission on renewals.	
MDRT or LUASA	Provides proof of the financial advisor's qualification for The Million Dollar Round Table.	Enter the production year and click on GO
Commission History	Lists commission history per policy, per financial advisor code.	
BHST Statement	Lists the commission statement per month, per financial advisor code.	Select a statement date and click on GO

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Resources

RESOURCES CENTRE	FUNCTION	ADDITIONAL NOTES
Forms	You are able to download and print all the Odyssey forms in a pdf format. Application Forms, New Business Forms, Claim Forms, etc)	No need to phone the branch for a faxed form.
Downloads	Shows latest Odyssey Quotation Package downloads with a release note.	
Policy Tracking	With Policy Tracking the Broker is able to track policies: <ul style="list-style-type: none"> when leaving the branch when initial underwriting is done when accepted by Odyssey. When a policy's status changes, you will be notified via email or sms.	Remember that the Broker should register for Policy Tracking under each individual Broker Code.

