

Sanlam Personal Loans Lead Process



1

Ligon to Sanport

2

Click on: Clients - Leads - create Sanlam Personal Loans lead

3

POPIA requirement
Obtain permission from your client to submit lead, download the form - form can be downloaded by clicking on Sanlam Personal Loans referral form under “Notes” or from Sanport (SPL001) under Forms and downloads on Sanport

4

Keep the permission obtained for your records and POPIA auditing purposes

5

Complete the lead form as prompted by the screens

6

Submit the form

7

Immediate feed back:
Intermediary: Pop up message indicates lead submitted successful or declined.

Client gets an sms

THANK YOU!