



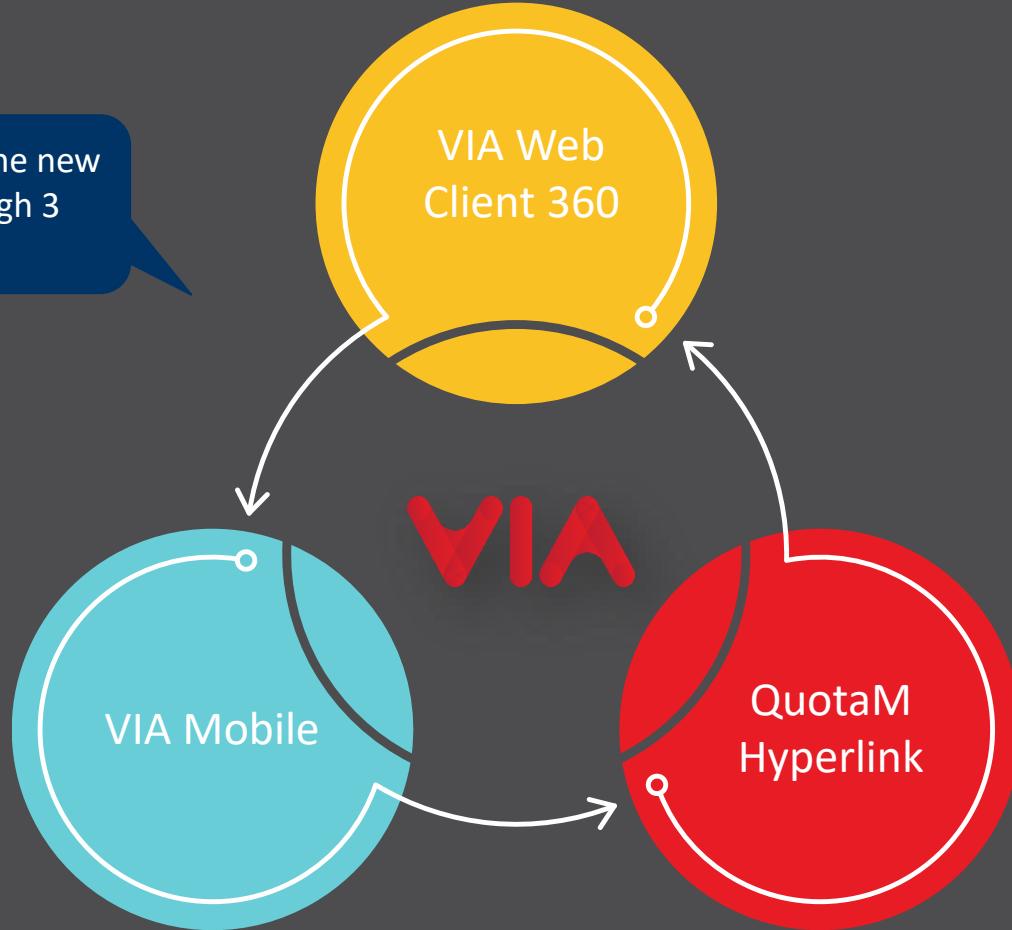
Quota

VIA entry points

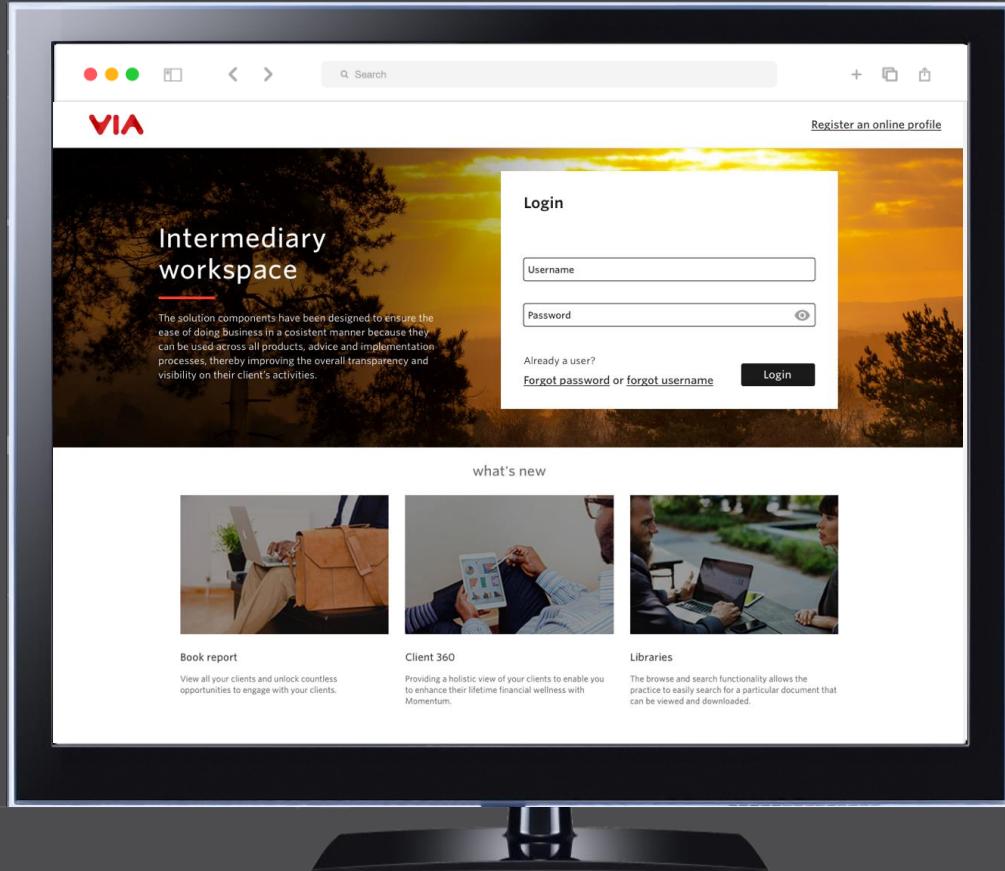
Entry points



You are able to access the new QuotaM platform through 3 different entry points.



VIA web and VIA mobile app part of the online process





web entry point

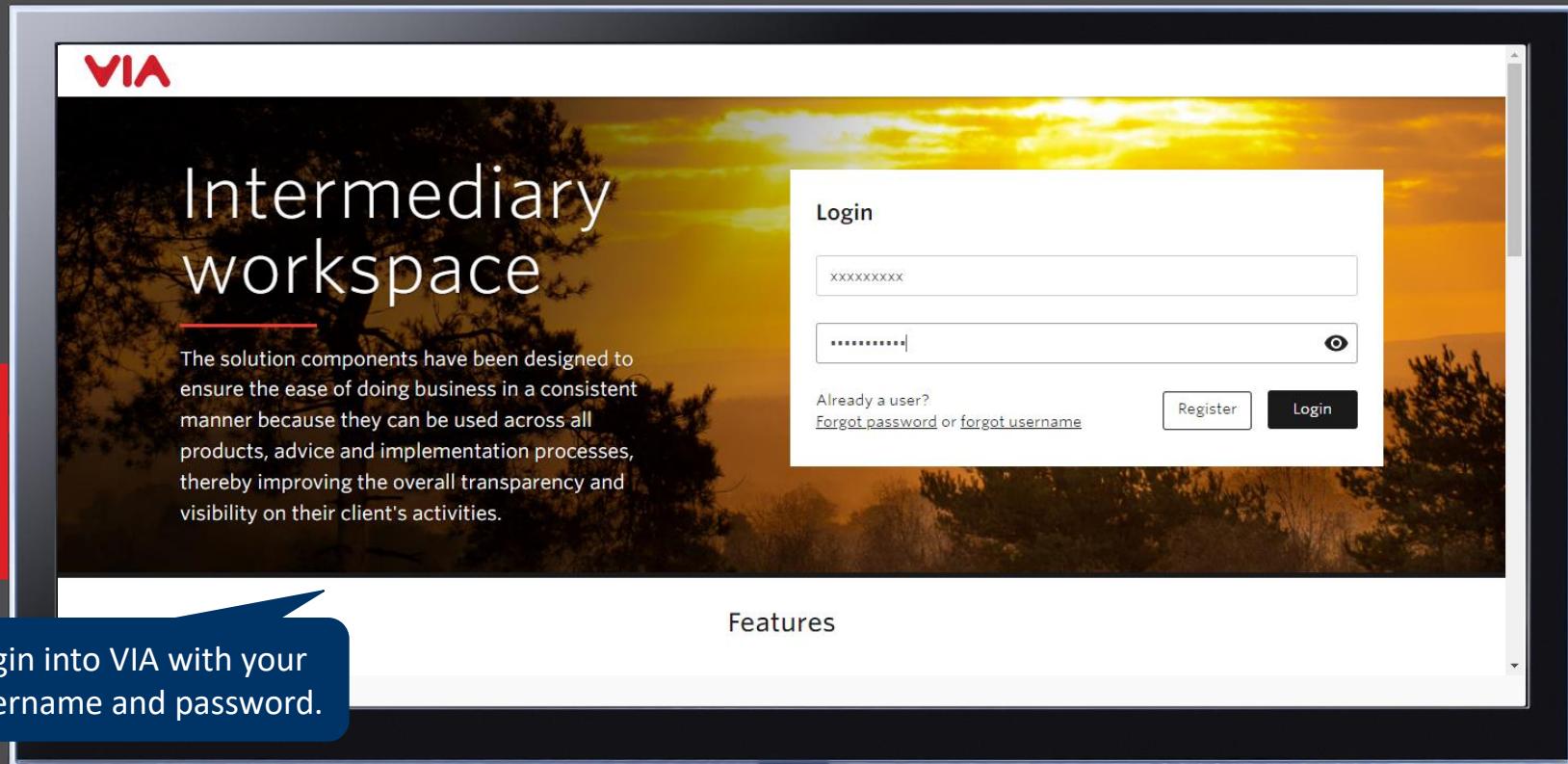


Client 360 entry point



Myriad Quote landing page in VIA web

m



The solution components have been designed to ensure the ease of doing business in a consistent manner because they can be used across all products, advice and implementation processes, thereby improving the overall transparency and visibility on their client's activities.

Features

Login into VIA with your username and password.

Login

xxxxxx

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Already a user?
[Forgot password](#) or [forgot username](#)

Register Login

Myriad Quote landing page in VIA web



From the home screen click on 'Clients'.

Click here

The screenshot shows the VIA web interface on a laptop screen. At the top, there is a navigation bar with links: HOME, ADVICE ADMIN (highlighted with a red arrow), CLIENTS, LEADS, BOOK REPORT, LIBRARIES, TRACKING, and TOOLS. A red arrow points to the 'CLIENTS' link. On the right side of the top bar, there is a 'Selected profile Financial Planner' indicator and a red 'MF' button. The main content area features a large red banner with the text 'Momentum Investo' and 'No paper, no emails, no calls. Update your client's Investo contact details.' Below this, there are several cards: 'Insights' (View reports), 'MFP INVESTMENTS CONNECT' (CLICK HERE), 'Sales' (View), 'Product providers' (View), 'Service providers' (View), '10 Step client engagement financial planning process' (Financial Planning), and a 'Momentum Announcements' section with links to 'PAYE fixed percentage tax rate issued by SARS | Paragraph 2(2B) directives - affecting qualifying annuitants (FAQs)' and 'Frequently Asked Questions (FAQs) have been added under Tax information for Investments and Savings and Life insurance. This document will assist in answering various questions related to SARS Paragraph 2(2B)'.

Myriad Quote landing page in VIA web

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From the client list choose either an existing client or a 'prospect client' and click on the 'View 360' tab.

The screenshot shows the 'Client List' page in VIA web. At the top, there is a search bar with a placeholder 'Username, Name, Email address, ID/ Passport/ Reg/ IT number' and a magnifying glass icon. Below the search bar is a 'Client Search' button. The main area features three tabs: 'All clients' (selected), 'Prospects', and 'Clients'. Below these tabs, there is a sorting option 'Sort by: Surname A-Z' and two buttons: 'Create an individual client' and 'Create a business client'. The main content area displays a table with columns: 'Clients', 'Identity', 'Phone number', 'Email address', and 'Client type'. The 'Client type' column shows 'Prospect' for all listed clients. Each client row has two buttons: 'View client' and 'View 360'. A red arrow points to the 'View 360' button for the second client in the list.

Clients	Identity	Phone number	Email address	Client type
Prospect				Prospect
Prospect				Prospect
Prospect				Prospect

Myriad Quote landing page in VIA web



In the clients portfolio view, click on the drop down arrow named 'Create'. Select 'Myriad' to open QuotaM in a separate browser.

Selected profile **Financial Planner** | **MF**

HU AABS

Documents More details

ETA Not in place Online profile Financial planning

Multiply Healthy heart Active Dayz™ Safe Dayz™ Safety score

REWARDS

NOTES

Myriad Quote landing page in VIA web



You will land on the create quote page in context of your existing/prospect client.

Create Quote

New Business Quote

Quote description

Select package

Personal Business Homeloan package Student package Option policy

Personal/Estate duty

Security for loan/bond

Other

Search

Select tax status

Natural Person

Title

Ms

Name

Hannelien

Surname

Voges

Identification number

Permanent ID Passport

Date of birth

1975-06-09

Gender

Male Female

Applicant is also a life insured.

Cancel Ok

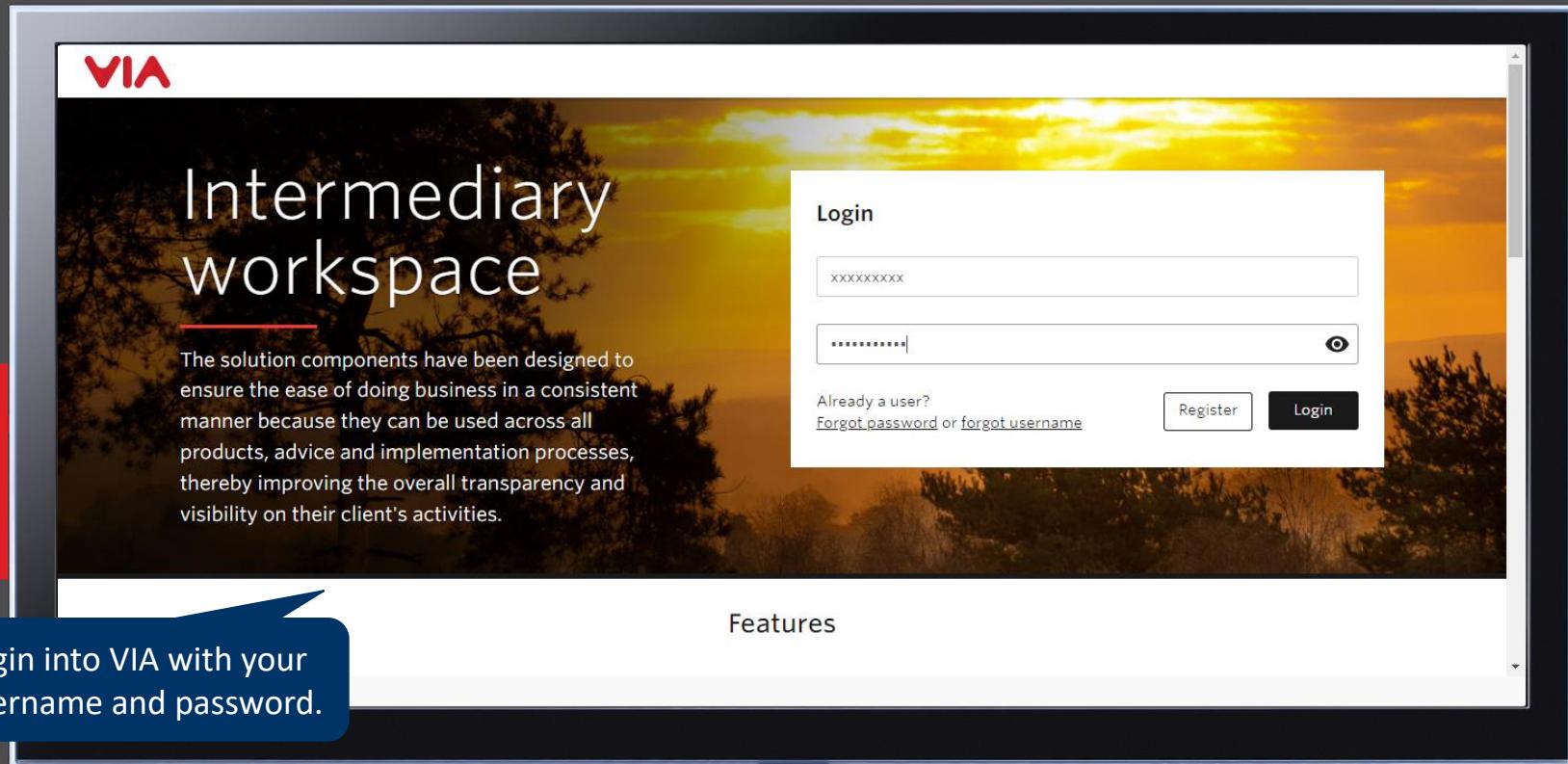
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Tools entry point



Myriad Quote landing page in VIA web

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Login

Already a user?
[Forgot password](#) or [forgot username](#)

Register Login

Features

Login into VIA with your username and password.

Myriad Quote landing page in VIA web



From the home screen click on 'Tools' on the navigation bar.

Click here

Momentum Investo

No paper, no emails, no calls. **Update your client's Investo contact details.**

momentum
Here for your journey to success

Insights
Gain access to up-to-date reports which will help you make better business decisions. New reports are added regularly, so keep checking in for more exciting insights

[View reports](#)

MFP INVESTMENTS CONNECT
Investment support anywhere, anytime

[CLICK HERE](#)

Sales
View contracts, statements, compliance and more

[View](#)

Product providers
Access different products to suit your clients needs

[View](#)

Service providers
Access different service providers to suit your clients needs

[View](#)

10 Step client engagement financial planning process
Provide step by step guidance through the process

[Financial Planning](#)

Momentum Announcements

PAYE fixed percentage tax rate issued by SARS | Paragraph 2(2B) directives - affecting annuitants (Frequently Asked Questions - FAQs)
Frequently Asked Questions (FAQs) have been added under Tax information for Investments and Savings and Life insurance. This document will assist in answering various questions related to SARS Paragraph 2(2B).

PAYE fixed percentage tax rate issued by SARS | Paragraph 2(2B) directives - affecting annuitants
SARS has put a new process in place where employers, fund administrators and insurers will receive a directive in terms of paragraph 2(2B) of the Fourth Schedule to the Income Tax Act, requiring that tax be deducted at the

Myriad Quote landing page in VIA web



Selected profile

HOME CLIENTS LEADS BOOK REPORT LIBRARIES TRACKING **TOOLS**

Quote

Wealth Quote
The Wealth Quote helps you create an online proposal for your client's new investment with Momentum Wealth.

[Create quote](#)

Quota II
Quota is the quotation system for the Myriad, Investo, Wealth, Wills and Health products of Momentum. It is a desktop application for the Windows platform.

[Download Quota and more](#)

Myriad Pipeline Cases
Please use existing online electronic application platform (E-App) to access existing new business quotes and/or applications

[E-App](#)

Health quote
Accredited health generate a quo Scheme Option complementar

[Start quote](#)

Myriad New Business and Alterations
The new online platform to create quotes and complete the application form electronically for all your Myriad business (new and/or existing policies)

[My Myriad business](#)

Click on 'My Myriad business'.

Create Quote

New Business Quote Alteration Quote

New Business Quote

Quote description

Select package

Personal Business Homeloan package Student package Option policy

Personal/estate duty

Security for loan/bond

Other

Select tax status

Natural Person

Search

Title

Name Surname

Identification number

Date of birth
yyyy-MM-dd

Gender

Permanent ID Passport

Male Female

Applicant is also a life insured.

Cancel Ok

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You will land on the create quote page and will be able to proceed with a quote.

Thank you!

