

m



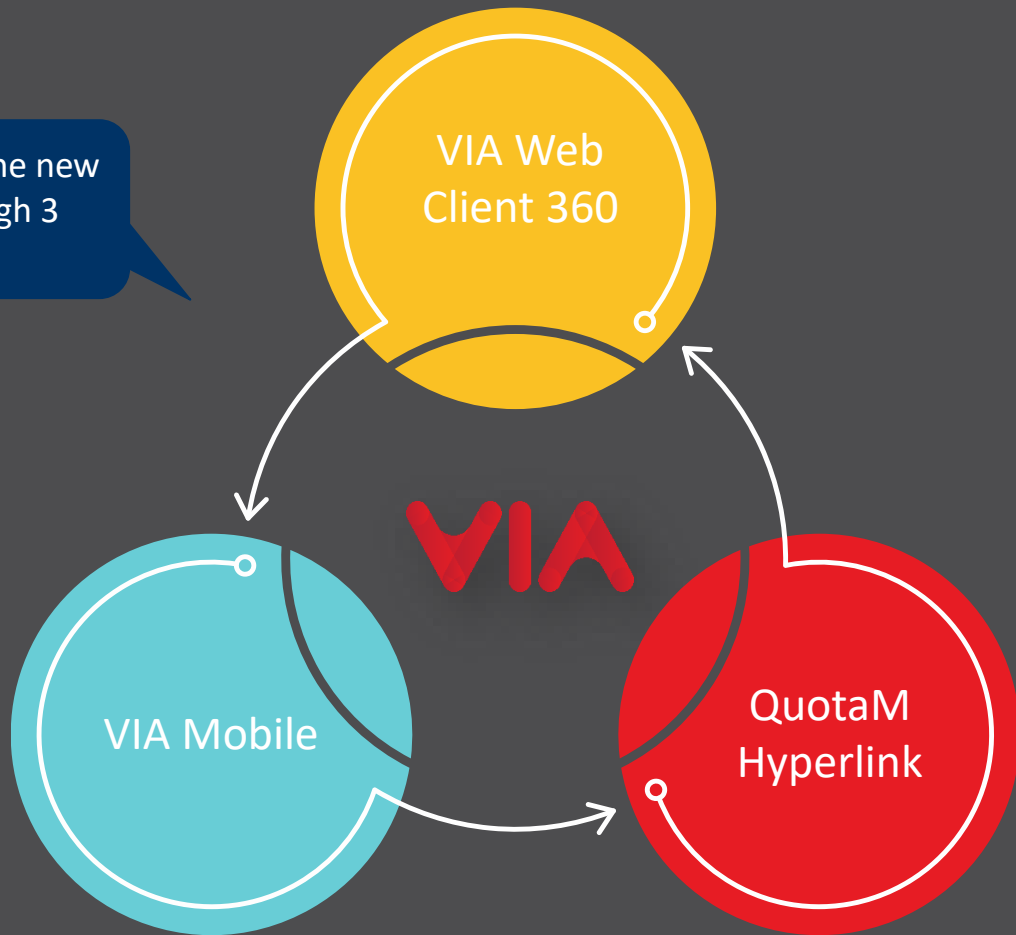
Quota  M

VIA entry points

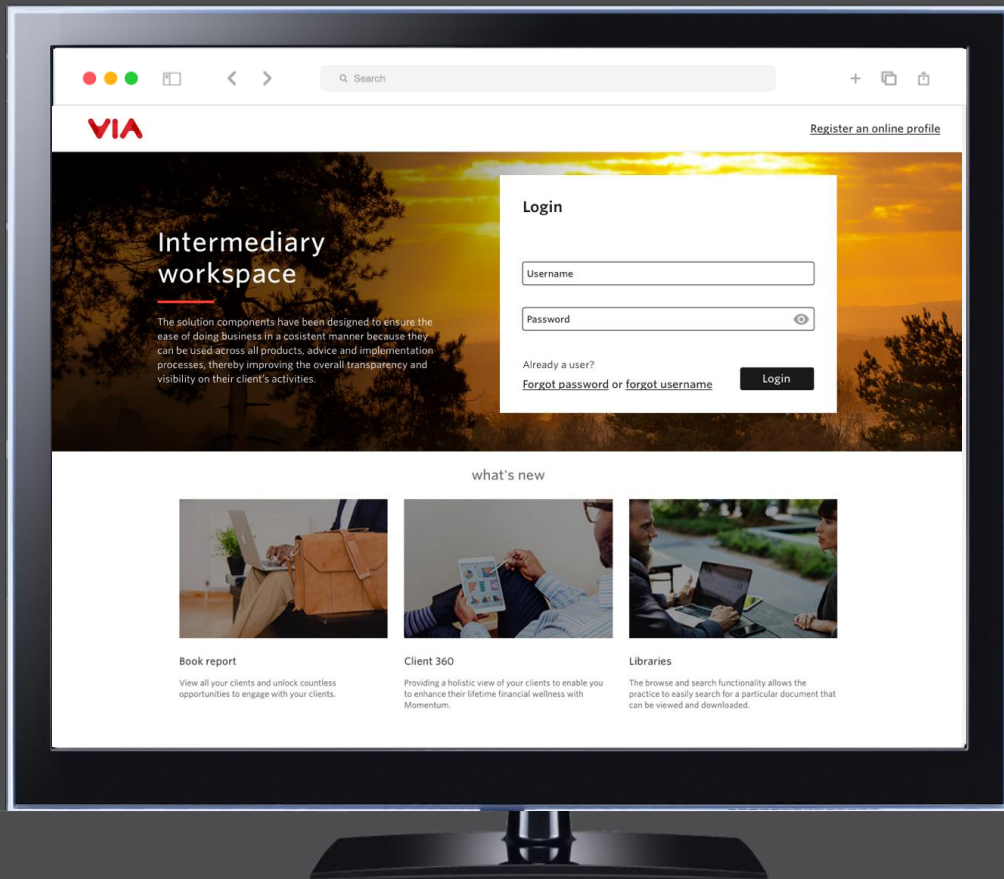
# Entry points



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





VIA

web entry point

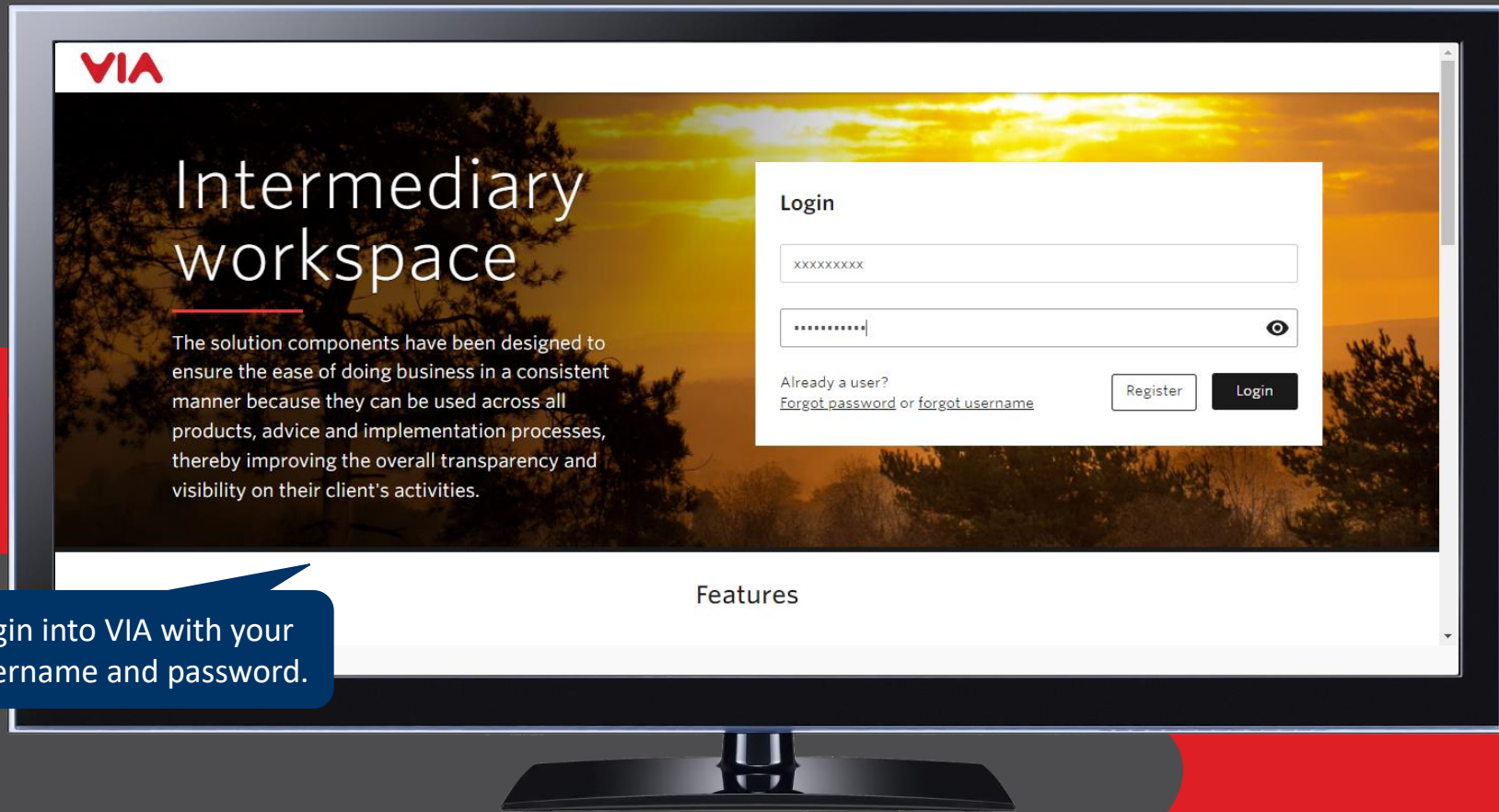
VIA

Client 360 entry point





# Myriad Quote landing page in VIA web



VIA

## Intermediary workspace

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.

### Login



Already a user?

[Forgot password](#) or [forgot username](#)

Register

Login

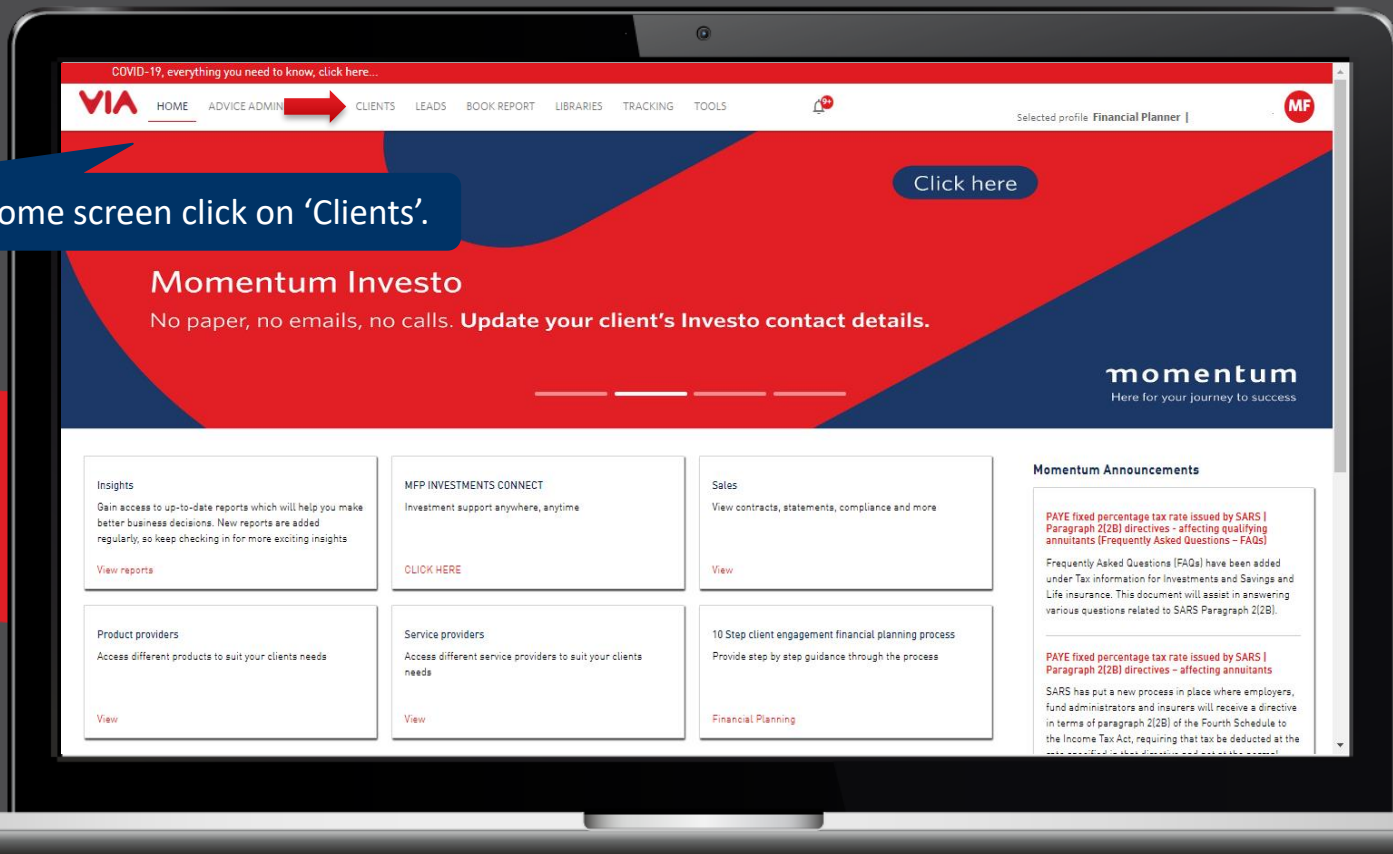
### Features

Login into VIA with your username and password.

# Myriad Quote landing page in VIA web

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From the home screen click on 'Clients'.



# Myriad Quote landing page in VIA web



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

## Client List

Surname, Name, Email address, ID/ Passport/ Reg/ IT number



Client Search

All clients

Prospects

Clients

Sort by: Surname A-Z ▼

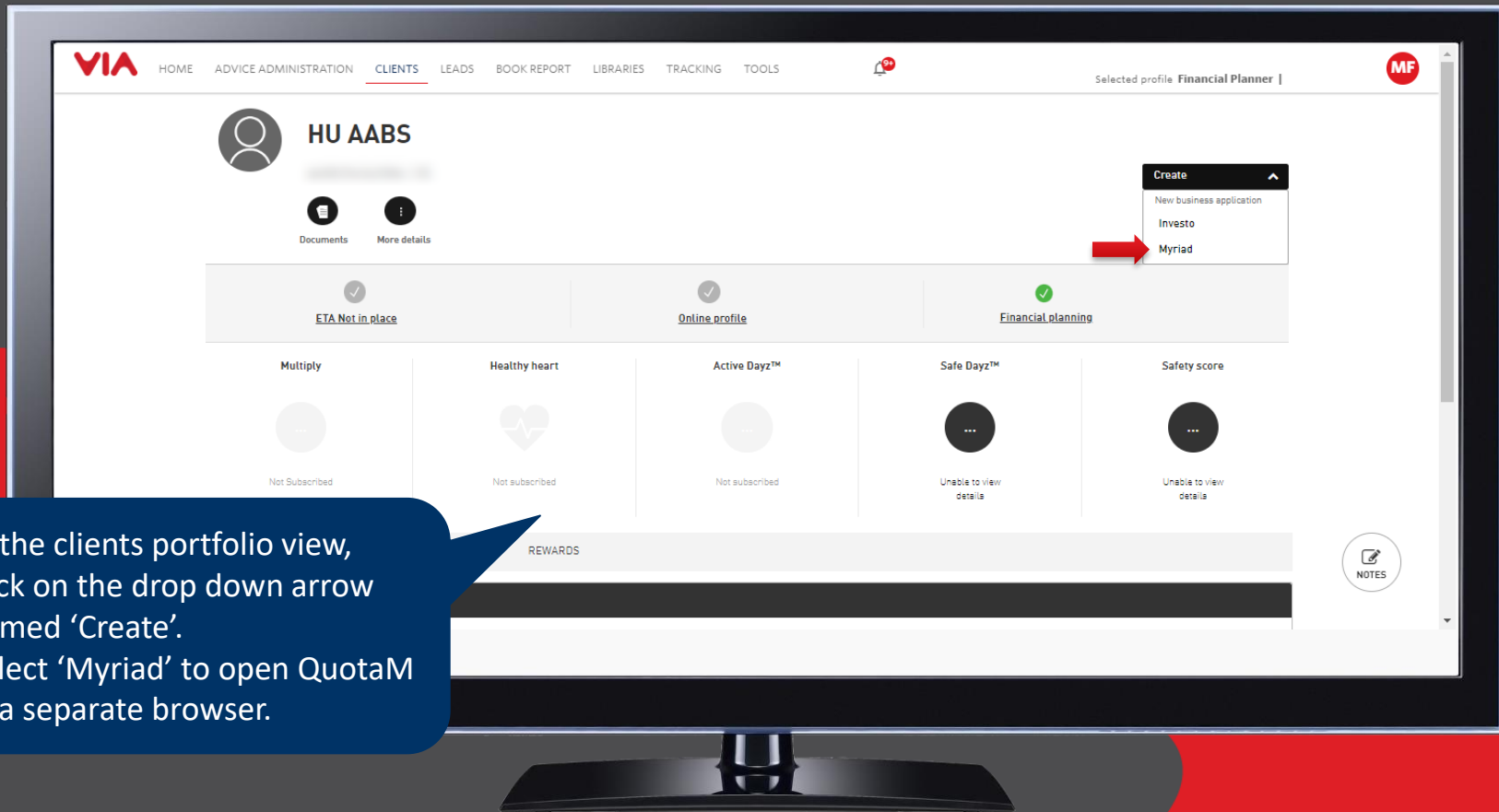
Create an individual client

Create a business client

Clients	Identity	Phone number	Email address	Client type
	Prospect			<a href="#">View client</a> <a href="#">View 360</a>
	Prospect			<a href="#">View client</a> <a href="#">View 360</a>
	Prospect			<a href="#">View client</a> <a href="#">View 360</a>



# Myriad Quote landing page in VIA web



# 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

<b>Personal</b>	Business	Homeloan package	Student package	Option policy
-----------------	----------	------------------	-----------------	---------------

Personal/Estate duty

Security for loan/bond

Other

Select tax status

Natural Person

Q Search

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.

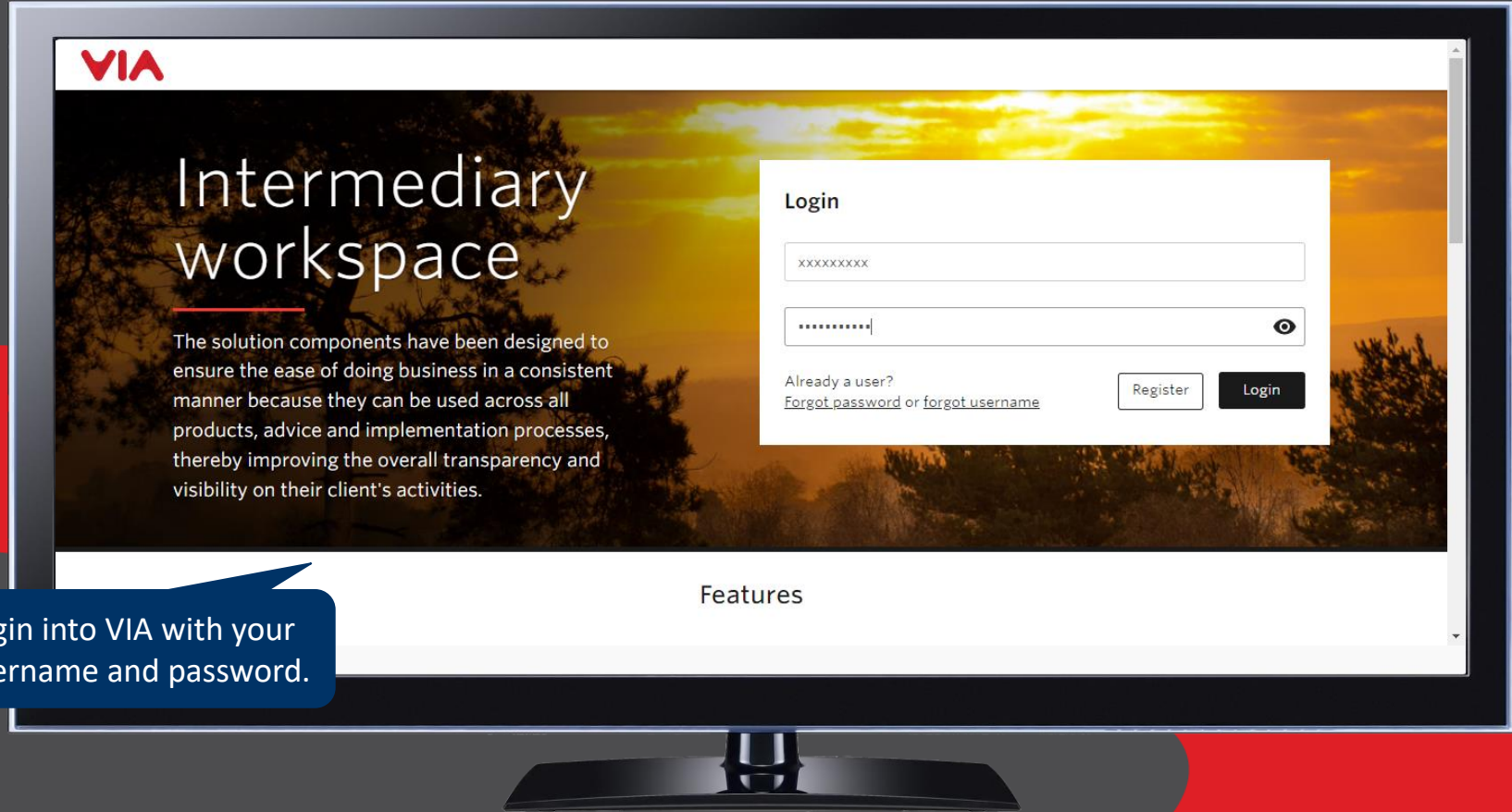
Cancel Ok

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Tools entry point



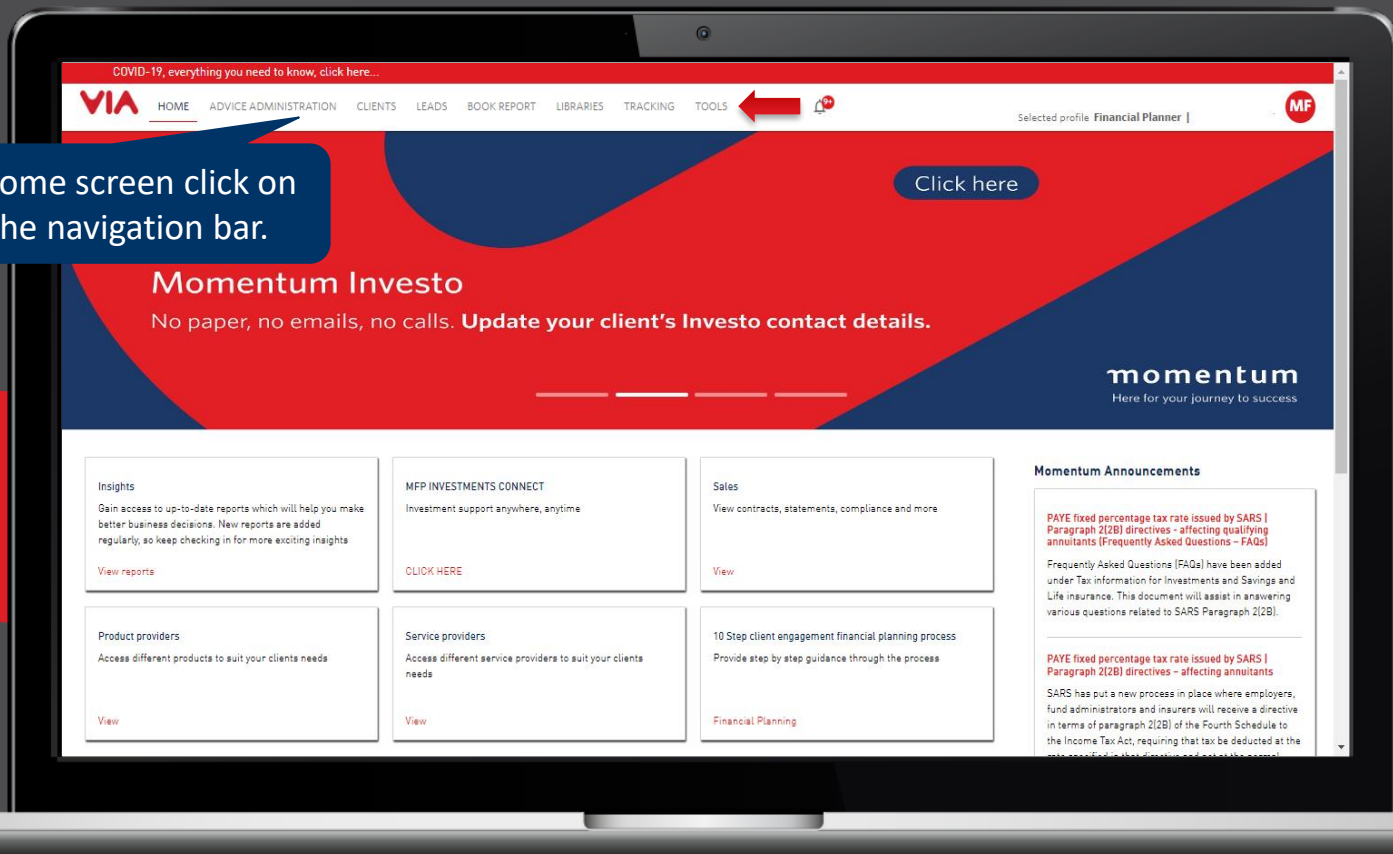
# Myriad Quote landing page in VIA web



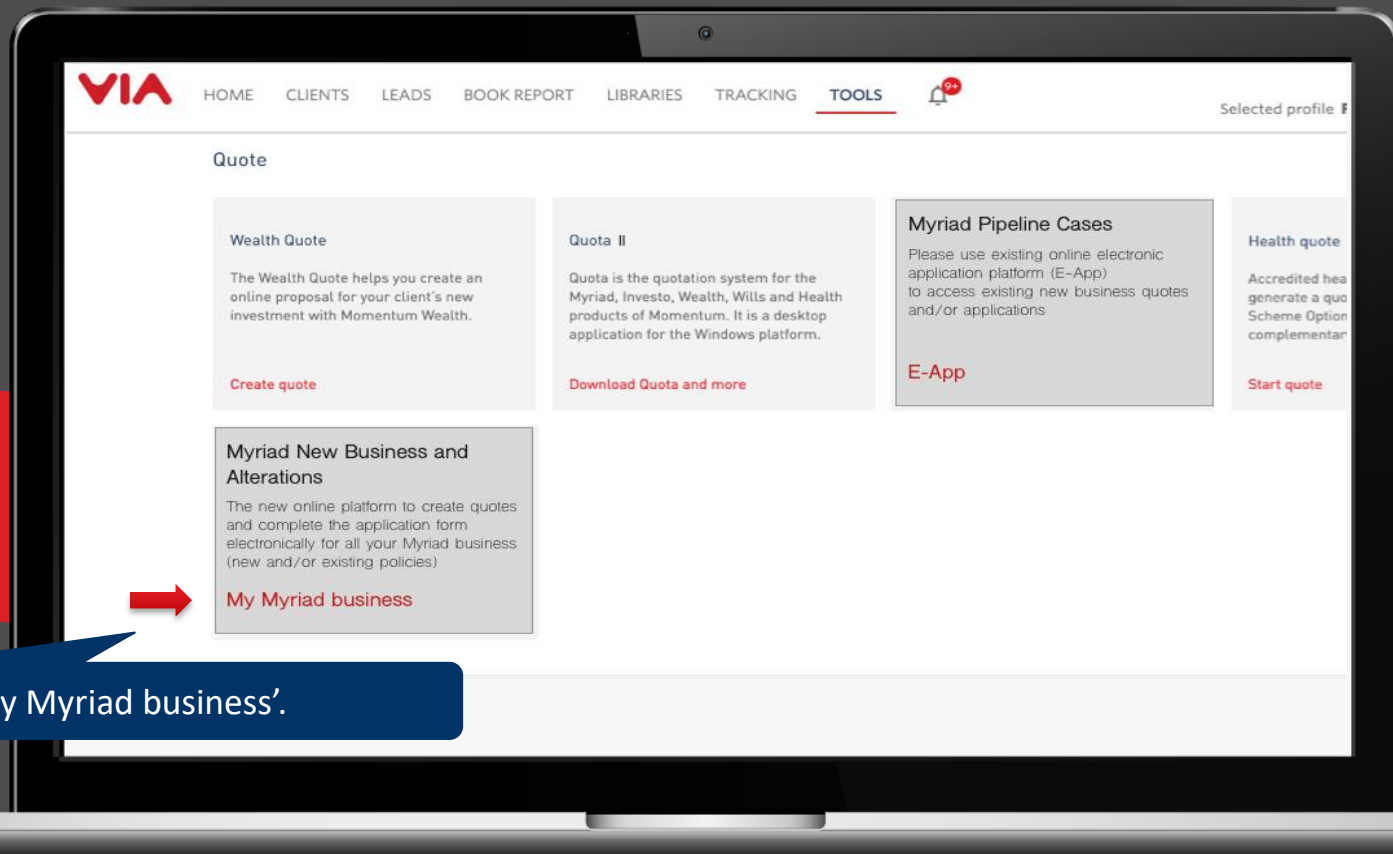
# Myriad Quote landing page in VIA web

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



# Myriad Quote landing page in VIA web



Click on 'My Myriad business'.



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

## 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 ▼

Q Search

Title ▼

Name

Surname

Identification number

☐ Permanent ID ☐ Passport

Date of birth

yyyy-MM-dd

Gender

☐ Male ☐ Female☐ Applicant is also a life insured.

Cancel

Ok

Thank you!

