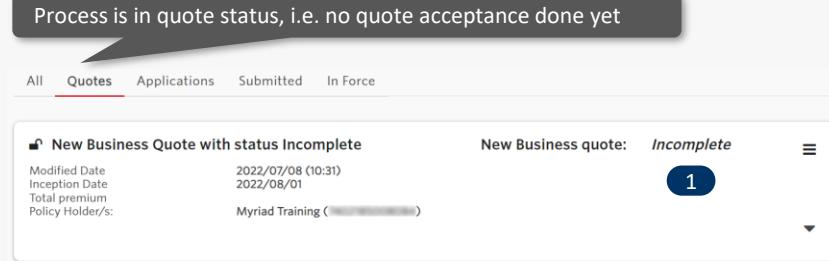


Different New Business Onboarding process statuses



Status description:
'New Business quote:
Incomplete'

Process is in quote status, i.e. no quote acceptance done yet



All Quotes Applications Submitted In Force

New Business Quote with status Incomplete

Modified Date	2022/07/08 (10:31)
Inception Date	2022/08/01
Total premium	
Policy Holder/s:	Myriad Training (██████████)

New Business quote: *Incomplete*

1

1. A status description of 'New Business quote: *Incomplete*' indicates that the process is in quote state, a quote has been started, but no quote report (.pdf) has been generated yet.

Different New Business Onboarding process statuses



Status description:
**'New Business quote:
quote reference #'**

Process is in quote status, i.e. no quote acceptance done yet

All Quotes Applications Submitted In Force

Locked New Business Quote with a quote reference number

Modified Date	2022/07/08 (10:26)
Inception Date	2022/08/01
Total premium	R 375.35
Policy Holder/s:	Myriad Training (.....)

New Business quote: 741085070811

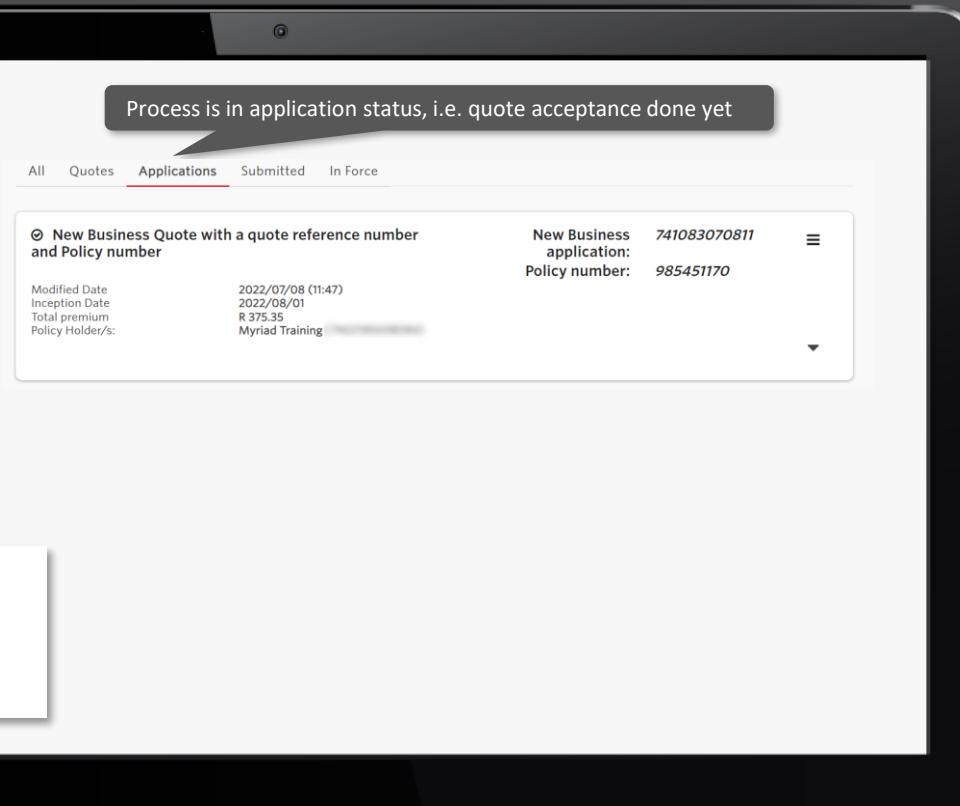
1

1. A status description of **'New Business quote: quote reference number'** indicates that the process is in quote state, a valid quote has been created and that the quote report (.pdf) has been generated.

Different New Business Onboarding process statuses



Status description:
'New Business application:
quote reference # and
Policy number: *policy #*'



Process is in application status, i.e. quote acceptance done yet

All Quotes Applications **Submitted** In Force

New Business Quote with a quote reference number and Policy number

New Business application: 741083070811
Policy number: 985451170

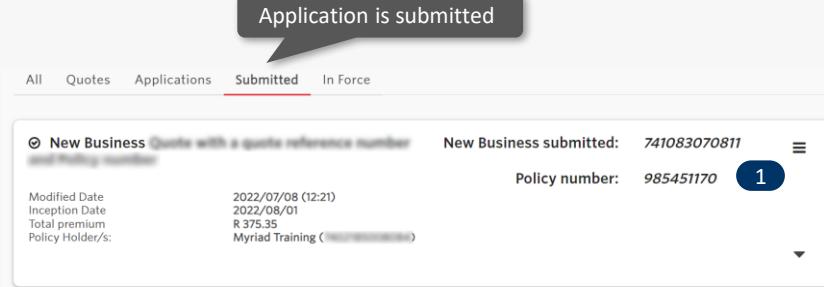
Modified Date	2022/07/08 (11:47)
Inception Date	2022/08/01
Total premium	R 375.35
Policy Holder/s:	Myriad Training

1. A status description with 'New Business application: **quote reference number** and **Policy number: policy #**' indicates that the quote has been accepted and the process is in application stage.

Different New Business Onboarding process statuses



Status description:
'New Business application:
quote reference # and
Policy number: *policy #*'



The screenshot shows a web interface for managing applications. At the top, there are tabs: All, Quotes, Applications, **Submitted** (which is underlined), and In Force. A speech bubble above the interface says 'Application is submitted'. The main content area shows a single application entry for 'New Business'. The entry includes: 'New Business' (radio button selected), 'Quote with a quote reference number' (text input), 'New Business submitted: 741083070811' (text input), 'Policy number: 985451170' (text input), and a '1' in a blue button. Below this, there are details: 'Modified Date: 2022/07/08 (12:21)', 'Inception Date: 2022/08/01', 'Total premium: R 375.35', and 'Policy Holder/s: Myriad Training (██████████)'.

1. A status description with '**New Business application: *quote reference number* and Policy number: *policy #***' indicates that the application has been submitted to Momentum and will go through the Underwriting process (if applicable).

Different New Business Onboarding process statuses



Status description:

'in force: Premium Paying
and Policy number: policy #'

The screenshot shows a web-based application interface for managing insurance policies. At the top, there is a navigation bar with tabs: All, Quotes, Applications, Submitted, and In Force. The 'In Force' tab is currently selected and underlined. Below the navigation bar, there is a search bar with the placeholder 'Search by Policy Number, Name, or Email'. The main content area displays a policy detail card. The card has two sections: 'In force: Premium Paying' on the left and 'Policy number: 985451170' on the right. Under 'In force: Premium Paying', there is a table with three rows: 'Inception Date' (2022/08/01), 'Total premium' (R 375.35), and 'Policy Holder/s' (Myriad Training). There are also three small icons: a magnifying glass, a person icon, and a gear icon. Below the card, there is a section titled 'Policy Details' with a table showing policy information like 'Policy Type' (Life), 'Status' (In Force), 'Effective Date' (2022/08/01), and 'Expiry Date' (2027/08/01). At the bottom of the card, there is a 'View Details' button. The background of the application has a dark grey header and a light grey body. The overall design is clean and modern.

1. A status description with 'In force: Premium Paying and Policy number: policy #' indicates that the policy is active, and coverage now applies to the policyholder.

Different Alterations Onboarding process statuses



Status description:

'Alterations quote: *Incomplete* and Policy number: *policy #*'

All Quotes Applications Submitted In Force

New Alteration quote

Modified Date: 2022/07/08 (14:46)
Total premium: R 1562.9
Policy Holder/s: [redacted]

Alterations quote: *Incomplete*
Policy number: *201953002*

1. A status description with 'Alterations quote: *Incomplete* and Policy number: *policy #*' indicates that the Alteration process is in quote state, a quote has been started, but no quote report (.pdf) has been generated yet.

Different Alterations Onboarding process statuses



Status description:

'Alterations quote: *quote reference #* and Policy number: *policy #*'

All Quotes Applications Submitted In Force

New Alteration quote

Modified Date: 2022/07/08 (14:46)
Total premium: R 1562.9
Policy Holder/s: Placeholder

Alterations quote: *Incomplete*
Policy number: *2022070815629*

1

1. A status description with 'Alterations quote: *quote reference #* and Policy number: *policy#*' indicates that the Alteration process is in quote state, a valid quote has been created and that the quote report (.pdf) has been generated.