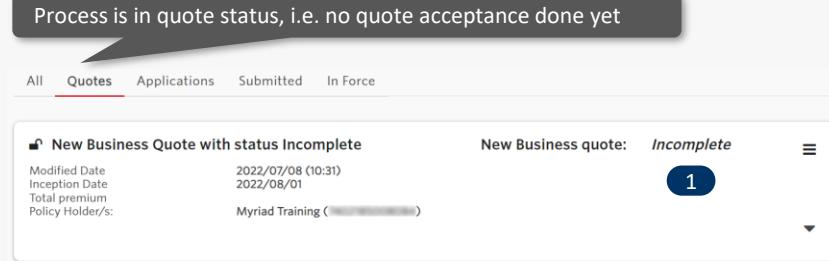# Different New Business Onboarding process statuses

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**   New Business quote: *Incomplete* ☰

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

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

🔒 **New Business Quote with a quote reference number**   New Business quote: *741085070811*   ☰

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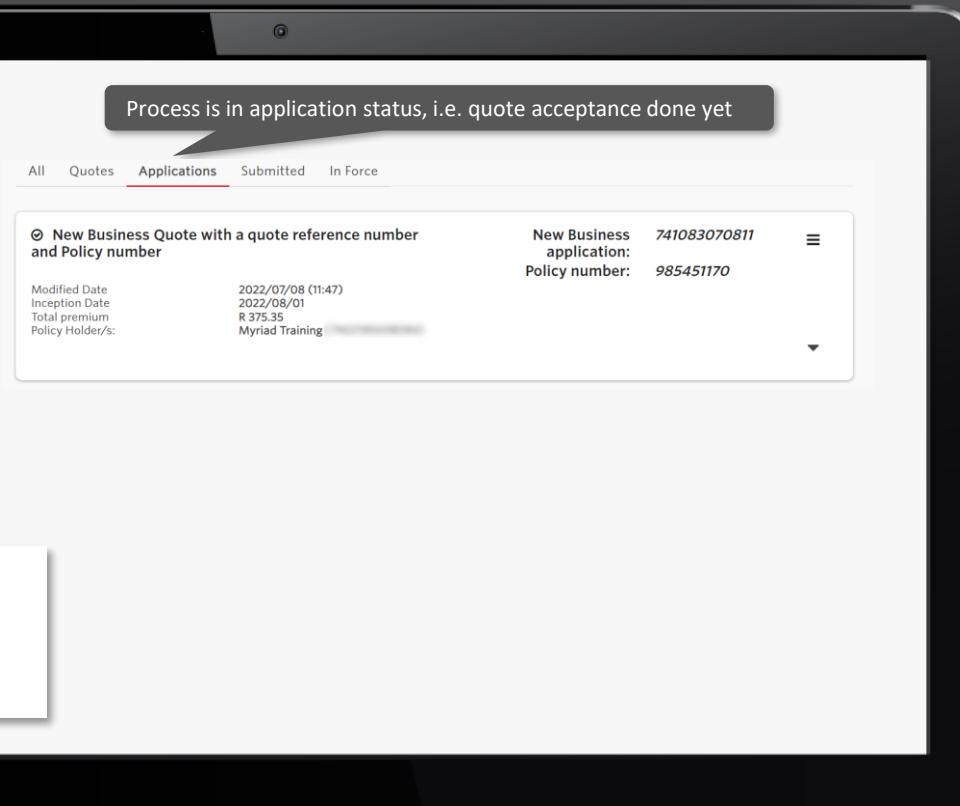Policy Holder/s: Myriad Training (   )

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**

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

New Business   741083070811
application:
Policy number: 985451170

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 #*'

Application is submitted

All   Quotes   Applications   **Submitted**   In Force

⊘ New Business Quote with a quote reference number and Policy number

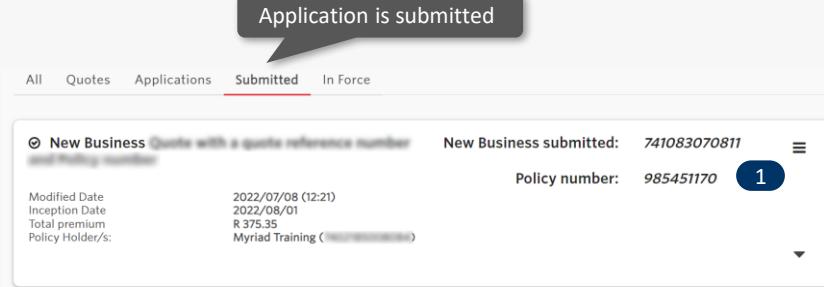New Business submitted: 741083070811
Policy number: 985451170   1

Modified Date   2022/07/08 (12:21)
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 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 #'*

| All | Quotes | Applications | Submitted | **In Force** |

In force: Premium Paying   Policy number: 985451170

Inception Date   2022/08/01
Total premium   R 375.35
Policy Holder/s: Myriad Training

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   Alterations quote: *Incomplete*
                                                          Policy number: ▒▒▒▒▒▒▒   **1**

Modified Date   2022/07/08 (14:46)
Total premium   R 1 562.9
Policy Holder/s: ▒▒▒▒▒▒▒▒▒▒▒▒▒▒▒

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**

Alterations quote: *Incomplete*
Policy number: ~~2097532923~~   **1**

Modified Date   2022/07/08 (14:46)
Total premium   R 1 562.9
Policy Holder/s: ~~JOHANNA VOGES (7906090040080)~~

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.