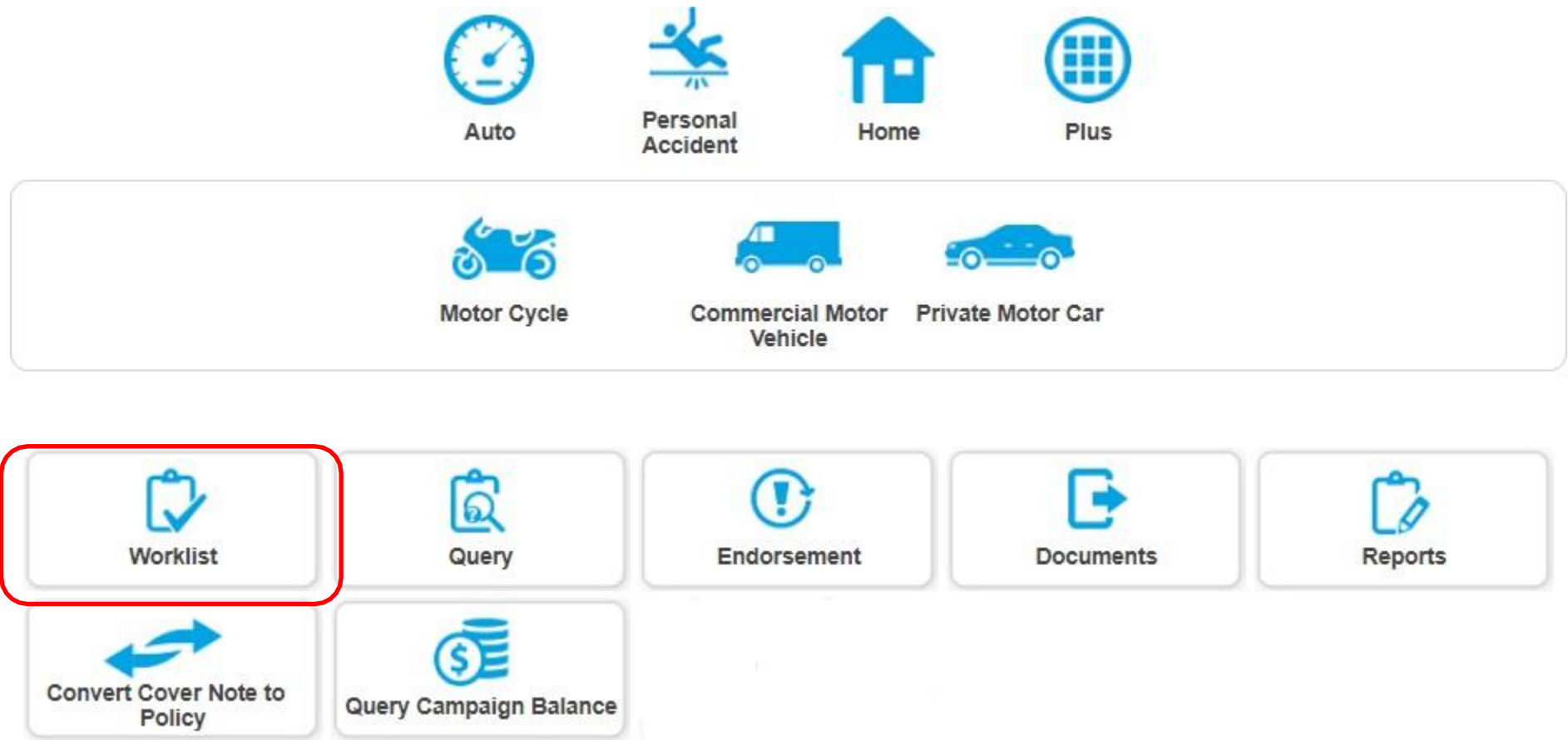


# Overview of WorkList

# Overview of Worklist

The Worklist function allows Producer to see his/her pending quotations done in the system .



# Overview of Work List

Work List

New Business

Endorsement

Renewal

[Home Page](#) > Work List

Work List

Search Criteria

Product

Please Select

Task Name

Please Select

Customer ID Number/Business Registration Number

Quotation Creation Date

DD/MM/YY

DD/MM/YY

Underwriting involved

All

License Plate No.

Quotation Number

Customer Name

Sales Channel

Effective Date

DD/MM/YY

DD/MM/YY

Underwriter decision

Please Select

Pending PDPA Acceptance

Please Select

Search

Reset

Please use query to search if policy is not found.

The **Work List** is for all In-Progress transactions including Renewal / Endorsement / New Business.

Policy which are expiring 60 days prior to the expiry date will have their Renewal Quotation in Worklist.

# Overview of Work List

Work List

[Home Page](#) > Work List

New Business

Endorsement

Renewal

Work List

Search Criteria

Product	Please Select	Quotation Number	
Task Name	Please Select	Customer Name	
Customer ID Number/Business Registration Number		Sales Channel	<a href="#">Find</a>
Quotation Creation Date	<div>DD/MM/YY</div> <div>DD/MM/YY</div>	Effective Date	<div>DD/MM/YY</div> <div>DD/MM/YY</div>
Underwriting involved	All	Underwriter decision	Please Select
License Plate No.		Pending PDPA Acceptance	Please Select

Search

Reset

Please use query to search if policy is not found.

**Product** – All Products will be listed in this dropdown

**Quotation Number** – Search using 10 digit quotation number

**Customer Name** – Last Name ONLY or LAST NAME follow by FIRST NAME

**License Plate No.** – Search for Auto policy using vehicle number

# Overview of Work List

Work List

Search Criteria

Product

Please Select

Task Name

Please Select

Customer ID Number/Business Registration Number

Quotation Creation Date

DD/MM/YY

DD/MM/YY

Underwriting involved

All

License Plate No.

Quotation Number

Customer Name

Sales Channel

Effective Date

DD/MM/YY

DD/MM/YY

Underwriter decision

Please Select

Pending PDPA Acceptance

Please Select

Find

Search

Reset

Please use query to search if policy is not found.

Task Name	Quotation Number	Product	Customer Name	Customer ID Number/Business Registration Number	Effective Date	Expiry Date	Sales Channel	Underwriter Decision	License Plate No.	Action
New Business Waiting For Payment	2070002658	Personal Accident	TC1 Reg7518	I324324Z	22/06/2020	21/06/2021	0500257000			<div>Continue Amend Reject</div>

**Continue** - To bind the policy

**Amend** - To amend the information of the policy before binding. Example, you can change the mode of payment, update contact details, addition of spouse, change of plan etc.

**Reject** - To reject / cancel the quotation

