AT A GLANCE   Socotra *Statuses*

Draft
- Initial Quote entry
- Price Indication available
- Could be referred or not referred.
- No cloning functionality
- UW Results (list of referred items)

Quoted
- No Referrals are generated – Or all Referrals are approved.
- Cloning functionality available
- Quote Letter / Installment breakdown (PDF Documents)
- Quote locked - no further changes for this version
- Clone locked quote to make edits (new version #)

Finalized
- Quote locked – no further actions can be made.
- Never Finalize unless you are ready to Bind/Pay
- Agent is ready to Bind and pay invoice.
- No cloning functionality
- Installment breakdown under Billing Tab/All Invoices
- New Tabs – Issue and Pay Invoice

Referred
- Draft status only
- Action items listed in (UW Results Tab)
- No cloning functionality until status is quoted.
- Price indication is available.
- No Quote Letter / Installment breakdown available
- Cannot Finalize or Pay Invoice

Declined
- Quote is locked for any further action.
- UW Results – reason(s) will be listed