

## Advanced Search Techniques (Personal Lines)

To improve your workflow, you can customize and save your search grid.

To access the search grid, hover over "Quotes & Policies" in the main menu underneath the Orchid logo. Click on "Search". The Submission/Policy List appears with all of the submissions and policies from your agency.

• Change the order of columns: Drag and drop any column header to the position you prefer.

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		ł	Hello, how may I help you?	23						
URC The First	Choice.									
Home Quotes & P	olicies Insureds									
Select Submission/	Policy or Create Ne	w Submission								
<ul> <li>Submission/Policy Li</li> </ul>	st									
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	Homeowners	26-Aug-2019		New Business						
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	Commercial	26-Aug-2019		New Business						
	Commercial	26-Aug-2019		New Business						
	Commercial Lines Brokerage	26-Aug-2019		New Business						

• Add or Remove Columns: Right-click on any column header and click on "Select Columns". Currently visible columns will be shown with an orange box and a checkmark. Click on any of these to remove them. Click on any other items in the list to enable them. When you are done adding/removing, scroll down and click "Apply Changes".

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Chat, Phone or Email, we're here to help you							Submission ID / Policy No.     Effective Date
Hello, how may I							<ul> <li>Named Insured</li> </ul>
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ne Quotes	& Policies Insureds						Status
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	<b>v</b> .	· ·		2↓	Sort A to Z		Client E-mail
				Z↓	Sort Z to A		Insured Address
	26-Aug-2019		Homeowners	J	Group By This Field		Client City
	Lo Hug Lors				Group By Box		Insured State/Province
	26-Aug-2019		Homeowners	Ψ	Remove This Column		Insured Phone
	26-Aug-2019		Homeowners	t†	Best Fit		Agency
	26-Aug-2019		Commercial	Ý	Filter Bar		Agency Code
	26-Aug-2019		Commercial	P	Select Columns	+	Valid Until (Last Transaction)
	26-Aug-2019		Commercial	•	Save Custom View		Term Effective Date
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	26-Aug-2019		Commercial Line	25	New Business	In	Term Status
			biokerage				Premium
	28-Aug-2019		Homeowners		New Business	Re	Total Term Taxes
	26-Aug-2019		Commercial		New Business	In	Assigned Underwriter Product
	26-Aug-2019		Homeowners		New Business	Q	Agency Contact Email
	26-Aug-2019	Second Street	Homeowners		New Business	Re	Need Info / Life Cycle Status
	26-Aug-2019		Commercial		New Business	In	Risk Group
							Inspection Process Status
	16-Oct-2019		Homeowners		New Business	Q	Risk State
	26-Aug-2019		Commercial		New Business	In	Inspection Type / Partial Submission

• Save Your Changes: If you would like to save your customizations, right-click on any column heading and click "Save Custom View". If you have text in any filter, it will get saved as a predefined filter. Your columns, column order, and filters will be saved in the Custom View.

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Submission/Policy L	51				_				
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	28-Aug-2019		Referred			USD			
	26-Aug-2019		Incomplete						
	26-Aug-2019		Quoted	2,232	2.00	358.35 USD			
	26-Aug-2019		Referred			USD			

• **Export Results to Spreadsheet:** You have the ability to export your search results to a spreadsheet. Disable your pop-up blocker if it is turned on. Right-click any table cell and click "Export Data". The system will generate a spreadsheet and download it.

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	16-Oct-2019		Quoted	1,401.00	333.16	USD			
	26-Aug-2019		Incomplete						