

User Interface Updates - Marketplace

1. Once logged in to Marketplace, you will land on “Start Quote”. The agency’s name will automatically appear. Select the producing agent and select the risk type. You can also go directly to the “Dashboard” or search for quotes and policies using the menu bar at the top of the page.

ORCHID
MARKETPLACE

Start Quote Dashboard Quotes & Policies Agent Portal Agent Disclaimers

Let's Get A Quote

HOME CONDO

What Agency Should This Be Associated To?

Agency

What Agent Should This Be Associated To?

Agent

2. Start typing the risk address in the search bar and it will appear in the dropdown. Select the correct address and the risk will appear on the map. If the address entered is incorrect or missing a unit number, select the pencil icon to edit.

Enter The Risk Address.

100 W Broadway apt 10, New York, NY 10002, USA

Map Satellite

Can't find address? Do you need to make edits to the risk address?
Select the edit icon to open up a window to make manual edits.

3. Enter the effective date and applicant details. Use the dropdown menus for the Owner Type, Home Occupancy Type, Exclude Wind, and Policy Type. Check the box affirming consent. Once satisfied, select “Start Your Quote”.

When Would You Like Coverage To Begin?

Effective Date
12/03/2025

We need a few details about your applicant.

Owner Type
Individual

First Name
Test

Last Name
Test

Date of Birth
05/02/1979

Home Occupancy Type
Primary

Exclude Wind
No

Policy Type
HO6

☒ Agent affirms and attests that the applicant has consented to and authorized the use of consumer reports obtained from a consumer reporting agency in the underwriting and/or rating of this quote.

Start Your Quote

4. Review or edit the risk address then select “Save Address” to save any changes.

Select the edit icon to open up a window to make manual edits.

When Would You Like Coverage To Begin?

Effective Date
12/03/2025

We need a few details about your applicant.

Owner Type
Individual

First Name
Test

Date of Birth
05/02/1979

Exclude Wind
No

Edit The Risk Address

Address Line 1
2000 West Broadway

Address Line 2
Apt 1C 200

City
New York

State
New York

Zip
10013

County
New York

Country
US United States of America (the)

Cancel **Save Address**

5. Validate the address by selecting “Confirm”.

When Would You Like Coverage?

Effective Date *
12/03/2025

We need a few details about you:

Owner Type *
Individual

First Name *
Test

Date of Birth *
05/02/1979

Exclude Wind *
No

Address Validation

The mailing address validation process helps ensure the quality and accuracy of the mailing location. The validator will suggest changes to the spelling and structure of the address. The validator will also warn the users when an address location may not be a validation US Postal Service delivery point.

200 West Broadway
Apt 10 201
New York **New York** 10013

☐ What You Entered

200 West Broadway
Apt 10 201
New York **NY** 10013

☒ Recommended

Cancel **Confirm**

6. Fill out the property details with all the required information. View the submission number on the left side of the page. If there are additional features to be considered in the Replacement Value, select “Launch RCE”.

Submission #: [Redacted]

Replacement Value
\$974,000.00

Refresh

Launch RCE

Let's Review The Property Details.

Year Built *
1915

Sq Footage *
8000

Condo No. of Stories *
2

What Floor Is Unit On? *
1

Type of Home
Condo

Protection Class
2

Foundation
Crawlspace

Construction Type
Wood Framing

Roof Shape
Gable

Roof to Wall Connection
Unknown

Roof Material
Built-up w/o Gravel

Roof Deck Attachment
Unknown

Roof Year
2022

Water Heater Location
1st Floor

Water Heater - Update Year
2022

HVAC (Heating)
Forced Air Heating System

HVAC - Update Year
2022

Garage
None

Laundry Location
1st Floor

Exterior Siding
Unknown

Opening Protection
No Protection

Fire Alarm
Smoke Detectors

Burglar Alarm
None

Interior Sprinkler Fire Protection
None

Plumbing Type
Copper

Plumbing - Update Year
2022

Electrical - Update Year
2022

Do you have primary flood?
No

HVAC
Central Air Conditioning

7. Once the details for the property are filled out, select the “Underwriting Details” button.

Available Markets

Step 1: Please Complete the UW Details

Underwriting Details

Step 2: To save your quote, please Adjust Coverages on the left and click on either “Create Quote” to generate the quote proposal or “Refer Quote” for the underwriter to review.

View Created Quotes

8. On the Underwriting Details page, enter the primary insured’s phone number and email address. If you want to add a secondary insured, select “Yes” from the dropdown menu and enter the date of birth and secondary insured’s name.

Underwriting Details

Submission #: 123456789

Insured/Principal: [Name]
DOB: [Date]
Risk Address: [Address]
Effective Date of Coverage: 12/03/2025

Insured/Principal Details

Phone Number * [Field]

Email Address * [Field]

Do you wish to add a Secondary Insured?
Yes

Date Of Birth * [Field]

First Name * [Field]

Last Name * [Field]

9. You will need to confirm if the mailing address is the same as the property address by selecting the check box. If the mailing address is different, enter the correct address.

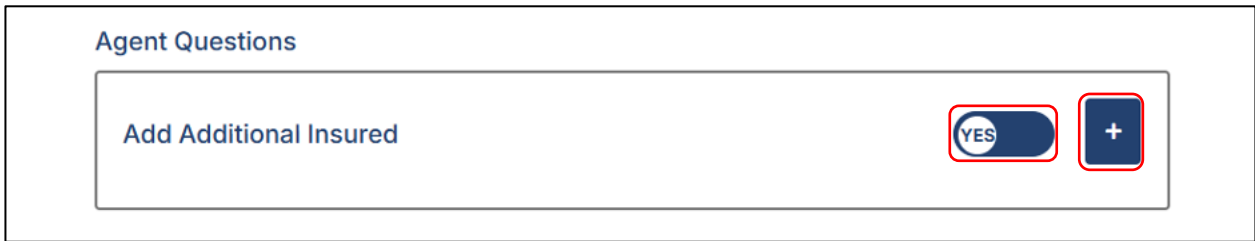
Insured Mailing Address

☒ Same as property address

[Address Field]

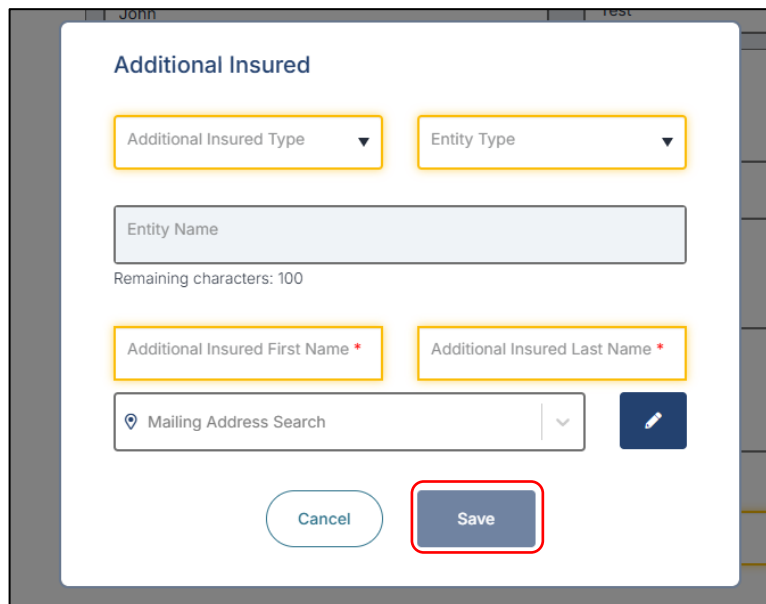
[Edit Button]

10. Under Agent Questions, you can add an additional insured. To add, change the slide from “No” to “Yes” and then select the “+” button.



The screenshot shows a section titled "Agent Questions". Inside this section, there is a button labeled "Add Additional Insured". To the right of this button is a toggle switch that is currently set to "YES", and a blue square button with a white "+" symbol. Both the toggle switch and the "+" button are highlighted with red rectangles.

11. If there is an additional insured, enter the corresponding information that is highlighted in yellow on the screen. Then select the “Save” button.



The screenshot shows a form titled "Additional Insured". The form contains several input fields: "Additional Insured Type" (a dropdown menu), "Entity Type" (a dropdown menu), "Entity Name" (a text input field), "Additional Insured First Name" (a text input field with a red asterisk), and "Additional Insured Last Name" (a text input field with a red asterisk). Below these fields is a "Mailing Address Search" field with a location pin icon and a dropdown arrow. At the bottom of the form are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red rectangle. The input fields for "Additional Insured Type", "Entity Type", "Additional Insured First Name", and "Additional Insured Last Name" are highlighted with yellow rectangles. Below the "Entity Name" field, it says "Remaining characters: 100".

12. Continue to enter the required information, starting with the address that the documents should be sent to.

Application Completed By Agent on behalf of Applicant(s)	Where to send documents? 1000 West Broadway Apt. 10 20, New York, NY 10019, USA
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Underwriting Details

Properties Owned 1	Marital Status Married	
Prior Market * New Purchase	Occupants * 2	Number of Bathrooms * 3
Do you rent the risk address? * No	Home Day Care on Premises? * No	Do you have a Trampoline? * No
Do you have primary flood? * No	Flood Zone * Unknown	Is there a fuel tank on premises? * None

Non Taxable No	Surplus Lines Exempt Risk?
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Is the property currently insured? * New Purchase	How long has it been uninsured?
Expiring Premium	Prior Insurance Carrier

Smart Home? * No	Smart Home Features	Smart Home App Notification
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13. Once all the required information and questions are answered, select the “Save Button”.

Do you use a wood burning stove as a primary source of heat? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Have you ever filed a 1st party lawsuit against your auto insurance or homeowners insurance carrier? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Is any business with visitors conducted at the property? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Has the applicant been canceled or nonrenewed by another insurance carrier for a reason other than nonpayment of premium? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Has any applicant been convicted of a felony in the past 10 years? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Mobile, Kit home, or Prefabricated home? *	<input checked="" type="radio"/> No	<input type="radio"/> Yes
By clicking 'Save', the agent acknowledges that the quoted premium may be adjusted after completion of application questions and loss history report is ordered. If there is a change in premium, your quote proposal will be automatically updated to reflect the changes and may be subject to underwriting review.		
<button>Cancel</button>	<button>Save</button>	

14. You will be brought back to the Available Markets page, and the “Underwriting Details” button will be green to show that it is complete.

<h2>Available Markets</h2>	
Step 1: Please Complete the UW Details	<button>Underwriting Details</button>

15. The available coverages are displayed on the left side of the available carriers. To adjust coverages, select the green carrot to display the coverages available. Select the “Calculate” button to capture changes. Once you are satisfied with the coverage, select the “Create Quote” button on the carrier you want to proceed with. At this time, you may also “Refer Quote” or “Decline Quote”.

- Please note, adjusting coverages may change the premium and availability of some carriers.

Submission #: 123456789

Adjust Coverages

Standard Coverages ✓
Deductibles ✓
Coverages ✓

Reset

Calculate

Estimated Premium

\$4,879.00

ms transverse

Water Damage Sublimit: \$10,000.00
Roofing System Sublimit: N/A
AOP: \$2,500.00
Named Storm: 5%

Create Quote

Estimated Premium

\$4,781.76

QBE

Water Damage Sublimit: \$10,000.00
Roofing System Sublimit: N/A
AOP: \$2,500.00
Named Storm: 5%

Create Quote

Estimated Premium

\$4,879.00

ch

Water Damage Sublimit: \$10,000.00
Roofing System Sublimit: N/A
AOP: \$1,000.00
Named Storm: 5%

Create Quote

Estimated Premium

\$4,965.76

ACCREDITED

Water Damage Sublimit: \$10,000.00
Roofing System Sublimit: N/A
AOP: \$1,000.00
Named Storm: 5%

Create Quote

Estimated Premium

\$4,982.00

LLOYD'S

Water Damage Sublimit: \$10,000.00
Roofing System Sublimit: N/A
AOP: \$1,000.00
Named Storm: 5%

Create Quote

16. In the carrier box, your quote number is displayed, and you can view your quote documents by selecting “View Documents”. Select the green “Finalize Quote” button to finalize the quote.

- If you referred a quote in the previous step, you must wait for underwriting to offer or decline the quote. After underwriting releases the referred quote, you may select the green “Finalize Quote” button.

The screenshot shows a side-by-side comparison of quote details for two carriers. On the left is MS Transverse, and on the right is QBE. Both show an estimated premium of \$4,741.78 and similar coverage details (Water Damage Sublimit: \$10,000.00, Roofing System Sublimit: N/A, AOP: \$2,500.00, Named Storm: 5%). The QBE section has a red box highlighting the 'Finalize Quote' (green) and 'View Documents' (blue) buttons. A sidebar on the left allows adjusting coverages, deductibles, and coverages, with a 'Reset' button.

17. On the Finalize Quote page, other quotes created under this submission number will be displayed. View the status of the quote under the column “Quote & Process Status”.

The screenshot shows the 'Finalize Quote' page. At the top, it says 'Quotes Created Under This Submission'. Below is a table with columns: Quote Number, Effective Date, Carrier, Quote & Process Status, Est. Premium, and Quote Proposal. The 'Quote & Process Status' column is highlighted with a red box, showing 'Offered-Pending Agent & Insured eSignature'. Below the table, there are two sections: one for the QBE carrier showing the estimated premium and submission details, and another for the status, which is 'Pending Agent & Insured eSignature' with a 'Refresh Status' button and a 'View Documents' link.

18. Complete the additional tasks for issuance like any mortgagee information by using the slide bar. If you change the slide bar to “Yes”, remember to then select the “+” button to add the mortgagee information. As a reminder, if you need to have the effective date changed, please contact our underwriting team.

Complete the tasks below for issuance

Application Information

Effective Date: 12/19/2025
If you need to change the effective date of the policy, please contact Underwriting at 772-226-5546. Once you e-sign or bind the policy, it may require a rewrite to change your effective date.

Add Mortgagees

NO

+

Add Additional Interest

NO

+

Claim Data
After Clicking Update Quote, any reported Claims will be retrieved and shown here. This may impact your calculated premium while finalizing your quote.

Update Quote

19. On the “Mortgagee” page, enter the required information, including if it is escrow billed. Only the primary mortgage can be selected for escrow bill. Validate the address by selecting the “Validate” button and then select the “Add” button. To add an additional interest, follow the same steps.

The screenshot shows the "Mortgagee" form. At the top, there's a section titled "Mortgagee" with two dropdown menus: "Mortgage Position" (set to "Primary") and "Escrow Account for Insurance Billing" (set to "Yes"). Below these are two text input fields: "Mortgage Name" and "Loan Number". A section titled "Select A Country" has a dropdown menu set to "US United States of America (the)". Below this is a location pin icon and a text input field. The "Mailing Address Line 1" section has a text input field. To its right is a "Mailing Address Line 2" text input field. Below "Mailing Address Line 1" is a "Mailing Address City/Town" text input field. To its right is a "State/Province/Region" text input field. Below "Mailing Address City/Town" is a "Mailing Address County/District" text input field. To its right is a "Mailing Address Zip Code/Postal Code" text input field. Below "Mailing Address County/District" is a "Mailing Address Country/Region" text input field, which is set to "USA". At the bottom right, there are three buttons: "Validate", "ADD", and "CANCEL". The "Validate" and "ADD" buttons are highlighted with red rectangles.

20. Then select the “Update Quote” button to run CLUE. Answer the pop-up window accordingly. This will pull any reported claims.

The screenshot shows the "Application Information" page. On the left, there's a section titled "Application Information" with a sub-section "Effective Date: 12/19/20". Below this, there's a text input field. On the right, there's a text input field. In the center, there's a pop-up window with the text: "Please note that proceeding with this update will lapse all previously generated quotes to ensure accurate rating and documentation. Would you like to continue?". Below this text are two buttons: "Yes" and "No".

21. Once complete, the result will appear or advise nothing was found. If the agent is aware of a claim that is not displayed, they should add it by selecting the “+” button.

Claim Data ✓
No clue claims were found.
If you need to add additional known claims, please use the plus sign to add new claims and then click on 'Update Quote'.

+

Update Quote

22. The Diligent Effort Form(s) must be completed, if required.

DILIGENT EFFORT FORM(S)
Electronic versions of these forms will be generated upon completion. All data inputs will be monitored for compliance with state rules. Please ensure you are providing accurate information.

DILIGENT EFFORT FORM

23. If you stated that there is a centrally monitored alarm, select the “Alarm Certificate Form” button and upload the alarm certificate.

Upload Alarm Certificate
If you applied a monitored alarm credit (burglar or fire), you must attach the certificate prior to bind. If you do not have the certificate today, we recommend returning to the quote, removing the credit, proceed to bind, and reapplying the credit as a future endorsement when the certificate is available.

Alarm Certificate Form

24. When it is time for electronic signatures, select the “Send Email” button. Enter the agent and insured email addresses, confirm that they are correct, and then select “Send eSign Request”.

Esign Request
Your compliance docs require electronic signature. Verify the email for you and your policyholder. Then click "eSign" to send the email to request signatures.


SEND EMAIL

25. Once all compliance documents have been signed by the insured and the producing agent, the status will update to “e-Signature Completed”.

Quotes Created Under This Submission

Quote Number	Effective Date	Carrier	Quote & Process Status	Est. Premium	Quote Proposal	
	2025-12-03	QBE	Offered-eSignature Completed		View Document	SELECT

Estimated Premium



Submission #:
Quote #:
Agent:

Status

eSignature Completed

Refresh Status

[View Documents](#)

26. For an inspection, enter the contact information for the inspection.

Inspection Contact Details

Please fill the below fields to Bind Quote.

First Name
Please

Last Name
Please

Phone Number
Please Add Phone

27. Bind the quote by selecting “Submit” or revise the quote by selecting the “Return To Available Market” or “Update Property details” buttons.

Bind Quote

Request a binder and allow for payment to be accepted. Policy issuance occurs automatically after payment is received.

Submit

Need to make any changes or adjustments?

Revise Your Quote

Revise your quote, and resubmit in Available Markets.

Return To Available Markets

Update Property Details

28. After you select “Submit”, you will receive a pop-up window confirming the bind. The policy number is available on the pop-up, but the policy will not be issued until payment has been received.

Nice work!

Your Quote is bound!

Here's your Policy Number

Remember: Payment is required to complete the issuance of the policy.

POST PAYMENT

DASHBOARD