



## Advanced Search Techniques (Personal Lines)

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

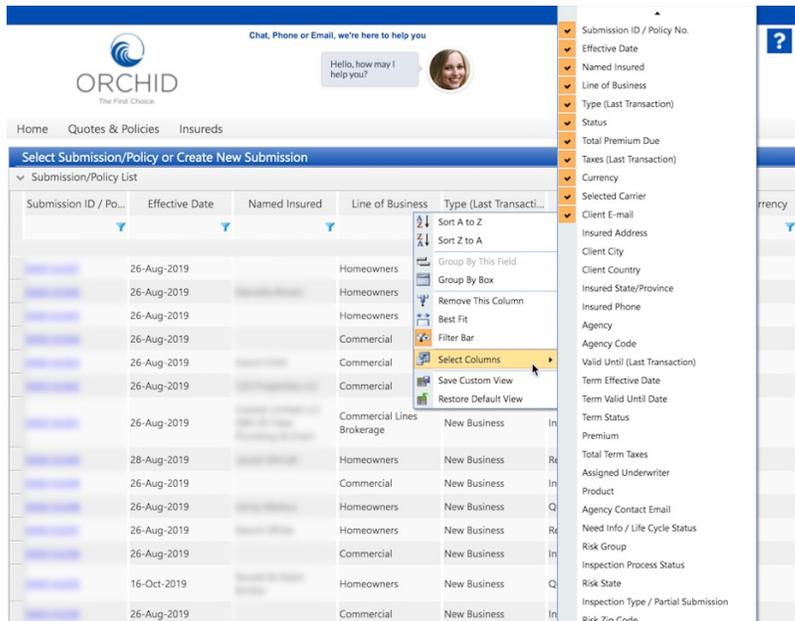
To access the search grid, hover over “Quotes & Policies” in the main menu underneath the Orchid logo. Click on “Search”. The Submission/Policy List appears with all of the submissions and policies from your agency.

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

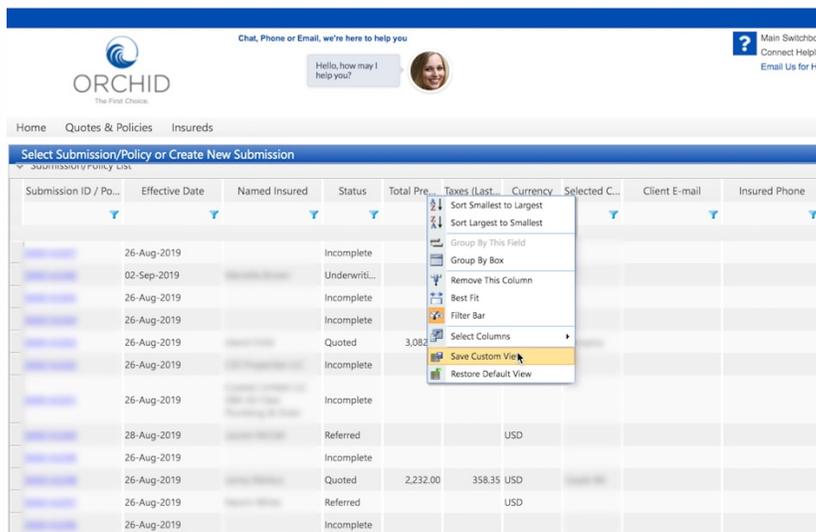
The screenshot displays the ORCHID web application interface. At the top, there is a navigation bar with the ORCHID logo and tagline "The First Choice." on the left, and a chat button labeled "Chat, Phone or Email, we're here to help you" on the right. Below the navigation bar, there is a menu with "Home", "Quotes & Policies", and "Insureds". A blue header bar reads "Select Submission/Policy or Create New Submission". Below this, a dropdown menu is open, showing "Submission/Policy List". The main content area is a table with the following columns: "Submission ID / Po...", "Line of Business", "Effective Date", "Named Insured", and "Type (Last Transacti...". The "Line of Business" column header is circled in red, and a tooltip is visible over it, indicating that it can be dragged to a new position. The table contains several rows of data, all with an effective date of "26-Aug-2019" and a type of "New Business".

Submission ID / Po...	Line of Business	Effective Date	Named Insured	Type (Last Transacti...
	Homeowners	26-Aug-2019		New Business
	Homeowners	26-Aug-2019		New Business
	Homeowners	26-Aug-2019		New Business
	Commercial	26-Aug-2019		New Business
	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”.



- 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.



- 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.

The screenshot shows the ORCHID insurance portal interface. At the top, there is a navigation bar with the ORCHID logo, a chatbot icon, and a help menu. Below the navigation bar, there is a section titled "Select Submission/Policy or Create New Submission" with a dropdown menu for "Submission/Policy List". The main content is a table with the following columns: Submission ID / Po..., Effective Date, Named Insured, Status, Total Pre..., Taxes (Last..., Currency, Selected C..., Client E-mail, and Insured Phone. The table contains several rows of data, and a context menu is open over one of the rows, showing options: Goto Filter Row, Refresh Grid, Export Data (highlighted), Save Custom View, and Restore Default View.

Submission ID / Po...	Effective Date	Named Insured	Status	Total Pre...	Taxes (Last...	Currency	Selected C...	Client E-mail	Insured Phone
	26-Aug-2019		Incomplete						
	02-Sep-2019		Underwrit...			USD			
	26-Aug-2019		Incomplete						
	26-Aug-2019		Incomplete						
	26-Aug-2019		Quoted	3,082.00	476.42	USD			
	26-Aug-2019		Incomplete						
	26-Aug-2019		Incomplete						
	28-Aug-2019		Referred						
	26-Aug-2019		Incomplete						
	26-Aug-2019		Quoted	2,232.00	358.35	USD			
	26-Aug-2019		Referred			USD			
	26-Aug-2019		Incomplete						
	16-Oct-2019		Quoted	1,401.00	333.16	USD			
	26-Aug-2019		Incomplete						