

Orchid Underwriters – Connect Support March 2019

How to Quote in Connect

There are 2 ways to access the quote application.

Method 1: Log into Connect and select "Personal Lines" on the homepage.



Choose the property's state and the correct product type to access the application.



Method 2: Click on "Quotes & Policies" in the top navigation menu and click "Create New Quote".



If you have the option to choose between Commercial Lines and Personal Lines, click on "Personal Lines" for a Personal Lines quote.

The application should now be on the screen. Fill out all of the information and click the > button to proceed to the next screen.

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On the "Coverages/Underwriting" screen, enter in the target premium. After the risk is submitted, the target premium is automatically compared against the real time quote premiums. If the target premium is within a certain percentage, the submission is sent to an underwriter to see if they can get closer to the target premium.

	Connect with us for Personal Lines:	AL-MS-TX and Commercial Lines (16 States): AL-CT	-DE-GA-FL-LA-MD-MA-MS-NJ-NY-NC-RI-SC-TX	C-VA For other products and states, visit our Agency Dashboard	
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	Golf Cart Physical Damage *	() Yes	O No		
	Extended Liability for Secondary Homes (Rental Properties Not Available)	0	-		
	Broadened Home Share Coverage (AirBnB, VRBO etc.)	• 🔿 Yes	O No		
	Would you like to add Valuable Items Coverage? **	○ ₩s	O No		
	v Underwriter Questions				
	Do you agree that the following questions can be answered as 'No' ?	Dwelling for sale? Has there been a lapse in coverage greater than 30 days? Is the home under construction?			
				< Save / Refresh	

On the "Select Your Quote" screen, you will find the Best Value premium and carrier at the top, along with the assigned underwriter.

	Connect with us for Personal Lines Chut, Phone or Email, with here to help you	In AL-MS-TX and Commercial Lines (16 States): AL-CT-C Lines (16 States): AL-CT-C	Main Berkhold 772-202-654 Connect Helpine: 772-202-654 Email Us for Help	For other produces and states, visit our ag Sign Up for Webiners: Personal Lines • Commercial Lines	ency, Dashboard	
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		Coverage Information Build Your Quote - The	Orchid Difference Information Required to Bir	d Coverage		
Submission Screens	Select Your Quote					Policy Information
Coverage Information Select Your Quote Information Required to Bind Coverage	Best value based on requested coverages Carrier Assigned Underwriter	\$ 1598.10 QBE This market is only available through Orchid Andy Ferris (772) 237-8538 andy@orchidinsurance.com				Line of <u>Homeowners</u> Business: Submission ID: 0000108813 Status: Quoted
Common Screens	Adjust Your Price					Agency: Orchid House Account Effective: <u>3/6/2019</u> Expiration: <u>3/6/2020</u>
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	Would you like to submit this risk for Underwriting Review?	⊖ Yes	 No 			

- a. You can adjust your coverages in the "Adjust Your Price" section and click "Save/Refresh" to receive updated premiums.
- b. Choose the desired carrier in the "Orchid's Market" table. You can choose a carrier with a real time quote or you can choose a carrier with "Can be Submitted for Underwriter Review" to receive a quote from an underwriter.
- C. If you would like to refer the submission to an underwriter, choose "Yes" for "Would you like to submit this risk for Underwriting Review?". This will open a text box for you to ask questions or to provide additional information for the underwriter. Click "Save/Refresh" or the right arrow button to refer the risk to the underwriter.

For real time quote selections: If you are happy with the premium and carrier selected and are ready to print the quote package, click on the "Print Document" button in Actions.

	Connect with us for Personal Line	s: AL-MS-TX and Commercial Lines (16 States): AL-CI	T-DE-GA-FL-LA-MD-MA-MS-NJ-NY-NC-RI-SC-TX-V	A For other products and states, visit our Age	ncy Deshboard	
	Chat, Phone or Email, we're here to help you		Main Switchboard: 772-226-5646 Connect Heipline: 772-237-8818 Email Us for Help	Sign Up for Webinans: Personal Lines • Commercial Lines		
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	Would you like to submit this risk for Underwriting Review?	O Yes	O No			
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A pop-up will show with all generated documents and forms. Click on "Print Document" to create a new quote package.

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Common Screens							Agency: Orchid House Account Effective: <u>3/5/2019</u>
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Choose "Quote Package" as the Document Template and input a filename. Then press "Print". This will download the file to your computer for e-mailing or printing. You will also be able to download it again by clicking "Documents/Forms" under Common Screens.

Take note of the submission ID so you can return to the submission more easily when you need to quote different coverages or request a bind.

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Select Your Quote	Carrier	Lloyds BA				Business
Information Required to Bind		This market is only available through Orchid				Submission ID: 000010881
Coverage	Assigned Underwriter	Andy Ferris (772) 237-8533 andy@orchidinsurance.com			-	Status: Quoted
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For Referred Submissions: Ensure that your e-mail is listed on this screen under "Agency Contact Email". Referred submissions take up to 24 hours for a quote to be sent back. If you need a rush, directly contact the underwriter by using the contact information on this screen.

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		Your quote will be submitted to the underwriter list	ed below.		
	Underwriter Name	Andy Ferris			
	Underwriter Phone Number	(772) 237-8533			
	Underwriter Email	andy@orchidinsurance.com			
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