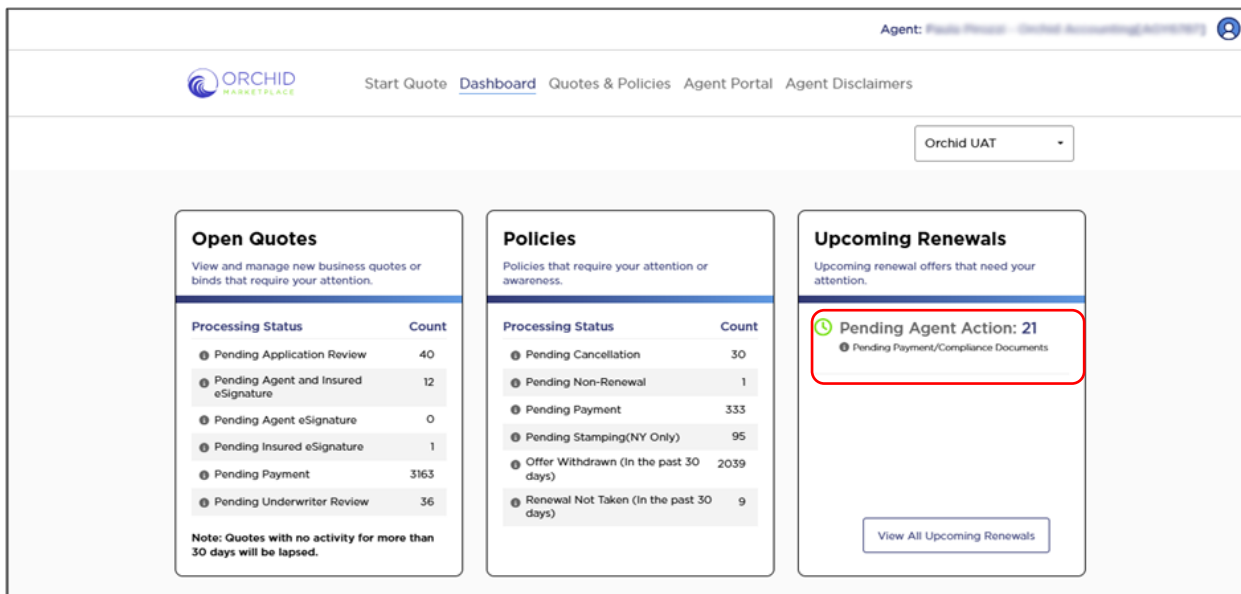
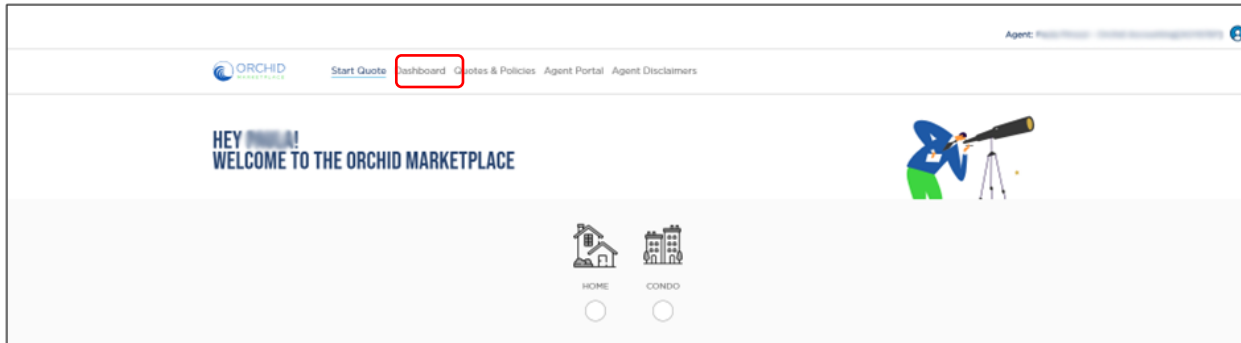


Agent Renewal – Marketplace

1. Once logged in select “Dashboard”. You will see active quotes, policies and renewals. From this dashboard you can select any item to drill down further.



2. Search by "Policies" from Quotes & Policies form the Marketplace landing page. From the "Policies" screen select "Filters", enter the policy number and select "Search".

ORCHID MARKETPLACE Start Quote Dashboard **Quotes & Policies** Agent Portal Agent Disclaimers

Orchid Accounting

POLICIES Query Result: 3000 Filters

Name Insured Effective Date - From Effective Date - To Status
Search MM/DD/YY MM/DD/YY All Policies

Address Policy Type Policy Number
Search 20UADE042500076IS-00

Search Clear Search

3. The results should include the policy you searched for. Select the policy to view the renewal quote.

ORCHID MARKETPLACE Start Quote Dashboard **Quotes & Policies** Agent Portal Agent Disclaimers

Orchid Accounting

POLICIES Query Result: 1 Filters

Name Insured Effective Date - From Effective Date - To Status
Search MM/DD/YY MM/DD/YY All Policies

Address Policy Type Policy Number
Search 20UADE042500076IS-01

Search Clear Search

EFFECTIVE DATE	INSURED NAME	POLICY#	ADDRESS	STATUS	TRANSACTION TYPE
2024-12-04	20UADE042500076IS-01	20UADE042500076IS-01		Pending Payment / Compliance Docs	Renewal

- Once you are at the policy you will see the renewal offer and its status. You will notice the Processing Status is Pending Payment/Compliance Docs. To view the renewal package, scroll to the bottom of the page.

ORCHID MARKETPLACE | Start Quote | **Dashboard** | Quotes & Policies | Agent Portal | Agent Disclaimers

Quote #: 0404769

Renewal Policy #: LCHA-FL-0006420-00 | Insured: [REDACTED] | Address: 200 Northwood 600 Street, Fort Lauderdale, Broward, FL, 33306, US

Policy History:

POLICY NUMBER	TRANSACTION TYPE	EFFECTIVE DATE	CARRIER	PREMIUM
Not found				

Renewal Offer List:

QUOTE NUMBER	EFFECTIVE DATE	CARRIER	PREMIUM	PROCESS STATUS
0404769	04/25/2025	Lloyd's Chaucer	8327.55	Pending Payment / Compliance Docs

\$8,327.55
PREMIUM

LLOYD'S

STATUS
Pending Payment / Compliance Docs

REFRESH STATUS

Thank you for your continued partnership with us! We are pleased to present you with a renewal offer. Please take a moment to review this offer and proceed with completing the necessary compliance documentation and payment for the renewal policy to be issued successfully.

IMPORTANT NOTE: If you need to make any revisions to the quote, please contact our Renewal Underwriting team by emailing renewals@orchidinsurance.com or phone (772)226-5546.

Complete the tasks below for issuance

REVISE THIS OFFER

To revise this quote please contact the Orchid Renewal Underwriting team at renewals@orchidinsurance.com or by calling (772) 226-5546.

- By selecting “Diligent Effort Form” you will complete any compliance documents required and obtain electronic signatures. Selecting “Pay Policy Now” allows you to make a payment on behalf of the insured. Below this section is the policy details.

Note: You are able to edit the Inspection Contact details here.

The screenshot shows a web interface with three main sections. The top section is titled "DILIGENT EFFORT FORM(S)" and includes a blue button labeled "DILIGENT EFFORT FORM". Below this is the "ESIGN REQUEST" section, which contains a blue button labeled "ESIGN", two text input fields for "EMAIL AGENT" and "EMAIL INSURED", and a blue button labeled "EDIT". The bottom section is titled "COMPLETE PAYMENT" and includes a blue button labeled "PAY POLICY NOW".

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.

ESIGN REQUEST
Your compliance documents require electronic signature. Verify the emails for you and your policyholder. Then click "eSign" to send the email to request signatures.

EMAIL AGENT:

EMAIL INSURED:

Inspection Contact details
Below is the inspection contact information we have on file. Please review and update if needed.

First Name: Last Name:

Phone Number:

COMPLETE PAYMENT
There is a payment due on this policy. Please click here to view your options.

- You may make the payment first or complete the compliance documents, the policy will not issue unless both are completed. Once the Diligent Effort is completed you will need to obtain the required e-signatures. Ensure the email address is correct, select “ESIGN”.

This screenshot shows the same web interface as above, but with the "DILIGENT EFFORT FORM(S)" section now marked as "COMPLETED" with a blue button. The "ESIGN REQUEST" section is highlighted with a red box, showing the "ESIGN" button and the email input fields.

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.

ESIGN REQUEST
Your compliance documents require electronic signature. Verify the emails for you and your policyholder. Then click "eSign" to send the email to request signatures.

EMAIL AGENT:

EMAIL INSURED:

7. Once the e-signatures are completed the button will show “Completed” and be inactive.



8. Below the policy details you will find the Document section. You can download the quote to review and present to your insured by selecting the link in blue.



9. Once all compliance docs are received, and the payment has been made and processed, the Policy Status will change to “Policy Active” and the policy documents will be issued.

