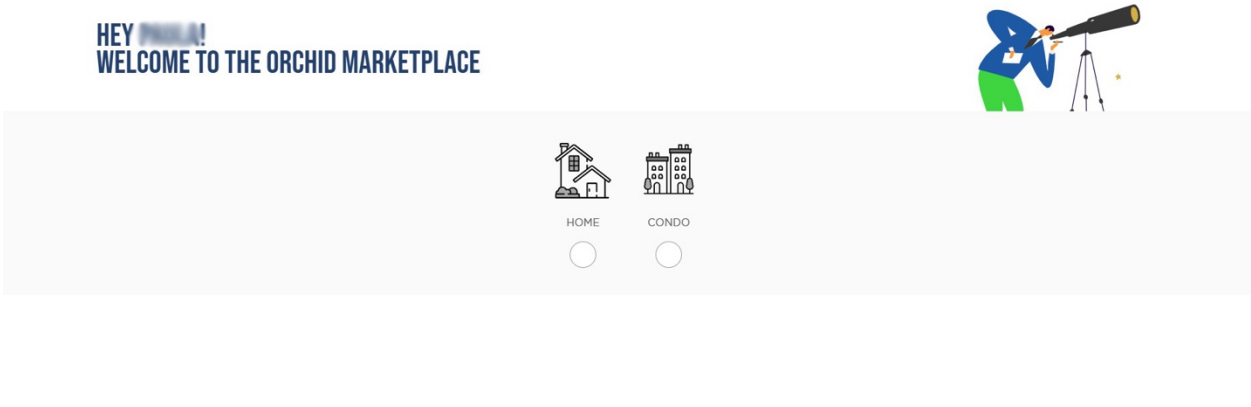
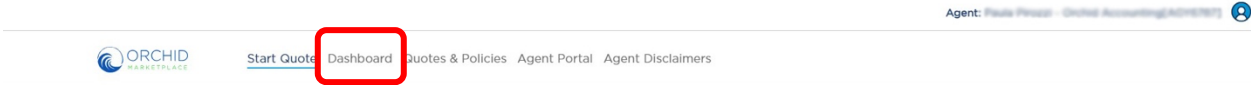


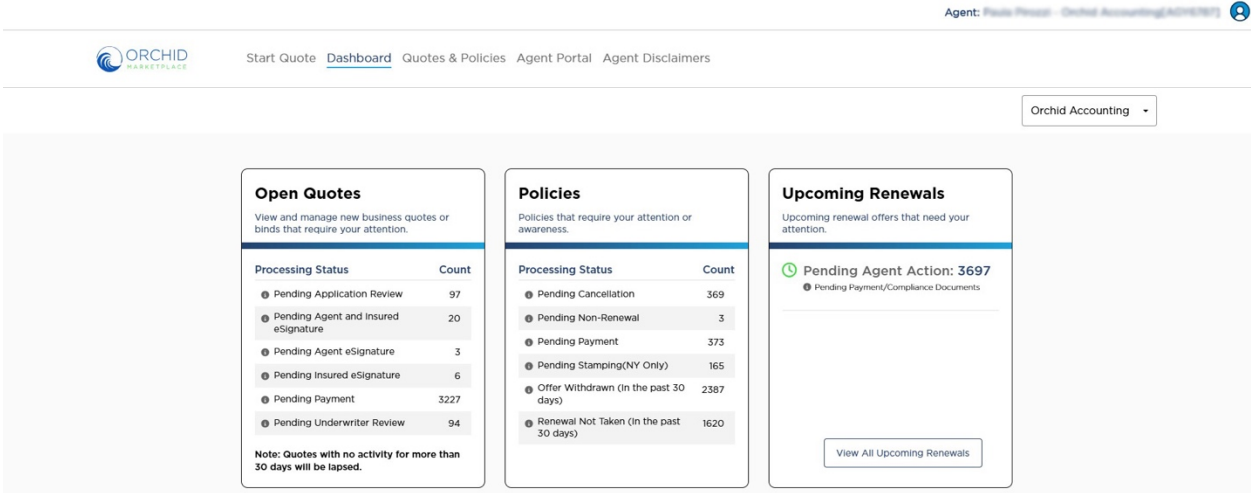
Marketplace Dashboard

Orchid has introduced a new Dashboard with additional functionality to assist you with managing your book of business.

When you log in to Marketplace you will still land on the page to start a quote. Select "Dashboard".



Once you select Dashboard you will see this screen.



Let's look at each tile.

Open Quotes allows you to view any quotes that are pending additional action such as eSignatures, or payments. Simply hover over the pending action and select it, this will bring you to the list of quotes.

Open Quotes

View and manage new business quotes or binds that require your attention.

Processing Status	Count
ⓘ Pending Application Review	97
ⓘ Pending Agent and Insured eSignature	20
ⓘ Pending Agent eSignature	3
ⓘ Pending Insured eSignature	6
ⓘ Pending Payment	3227
ⓘ Pending Underwriter Review	94

Note: Quotes with no activity for more than 30 days will be lapsed.

Policies tile will allow you to see the processing status on policies that need your attention such as pending cancellations.

Policies

Policies that require your attention or awareness.

Processing Status	Count
ⓘ Pending Cancellation	369
ⓘ Pending Non-Renewal	3
ⓘ Pending Payment	373
ⓘ Pending Stamping(NY Only)	165
ⓘ Offer Withdrawn (In the past 30 days)	2387
ⓘ Renewal Not Taken (In the past 30 days)	1620

Upcoming Renewals will provide you with of upcoming renewals that need attention. You will also be able to select the button “View All Upcoming Renewals” soon to see what renewals are coming up.

Upcoming Renewals

Upcoming renewal offers that need your attention.

🕒

Pending Agent Action: 3697

📌 Pending Payment/Compliance Documents

View All Upcoming Renewals

To search for a specific quote or policy select “Quotes & Policies” from the top toolbar.

Start Quote
Dashboard
Quotes & Policies
Agent Portal
Agent Disclaimers

Agent: [Paula Phipps - Orchest Accounting@ADHERENT](#)

Orchid Accounting ▾

Open Quotes

View and manage new business quotes or binds that require your attention.

Processing Status	Count
📌 Pending Application Review	97
📌 Pending Agent and insured eSignature	20
📌 Pending Agent eSignature	3
📌 Pending Insured eSignature	6
📌 Pending Payment	3227
📌 Pending Underwriter Review	94

Note: Quotes with no activity for more than 30 days will be lapsed.

Policies

Policies that require your attention or awareness.

Processing Status	Count
📌 Pending Cancellation	369
📌 Pending Non-Renewal	3
📌 Pending Payment	373
📌 Pending Stamping(NY Only)	165
📌 Offer Withdrawn (In the past 30 days)	2387
📌 Renewal Not Taken (In the past 30 days)	1620

Upcoming Renewals

Upcoming renewal offers that need your attention.

🕒


Pending Agent Action: 3697

📌 Pending Payment/Compliance Documents

View All Upcoming Renewals


Dashboard Job Aid
12/21/24

This function will default to all policies. You can search by policy number or name by selecting filter.

Agent: Paula Pizarro - Orchid Accounting(AD16787) 


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

Orchid Accounting ▾

POLICIES Query Result: 3000 

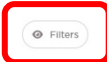
EFFECTIVE DATE ▾	INSURED NAME ▾	POLICY# ▾	ADDRESS ▾	STATUS ▾	TRANSACTION TYPE ▾
2023-12-01	Test CPO Test	PREF-FL-0001289-00	1242 98th Avenue Northwest, Naples, FL 34102	Offer Withdrawn	New Business
2023-12-29	870 CPO Test	QOUS-TX-0000137-00	115 W Main St #104, Edna, TX 77602 USA	Policy Active	New Business

Once you select filter your search options will appear. Simply enter your search criteria and select “Search”.

Agent: Paula Pizarro - Orchid Accounting(AD16787) 

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

Orchid Accounting ▾

POLICIES Query Result: 3000 

Name Insured Effective Date - From Effective Date - To Status

Address Policy Type

EFFECTIVE DATE ▾	INSURED NAME ▾	POLICY# ▾	ADDRESS ▾	STATUS ▾	TRANSACTION TYPE ▾
2023-12-01	Test CPO Test	PREF-FL-0001289-00	1242 98th Avenue Northwest, Naples, FL 34102	Offer Withdrawn	New Business

This will locate the policy or quote you are looking for. Once you select the result you will be taken to the detail page.

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:

Address: Policy Type: Policy Number:

EFFECTIVE DATE	INSURED NAME	POLICY#	ADDRESS	STATUS	TRANSACTION TYPE
2023-12-29	WFO OPS Test	QOUS-TX-0000137-00	115 W MAIN ST #104, SHELBY, TN 37165 USA	Policy Active	New Business