

Broker Homepage and Dashboard Overview

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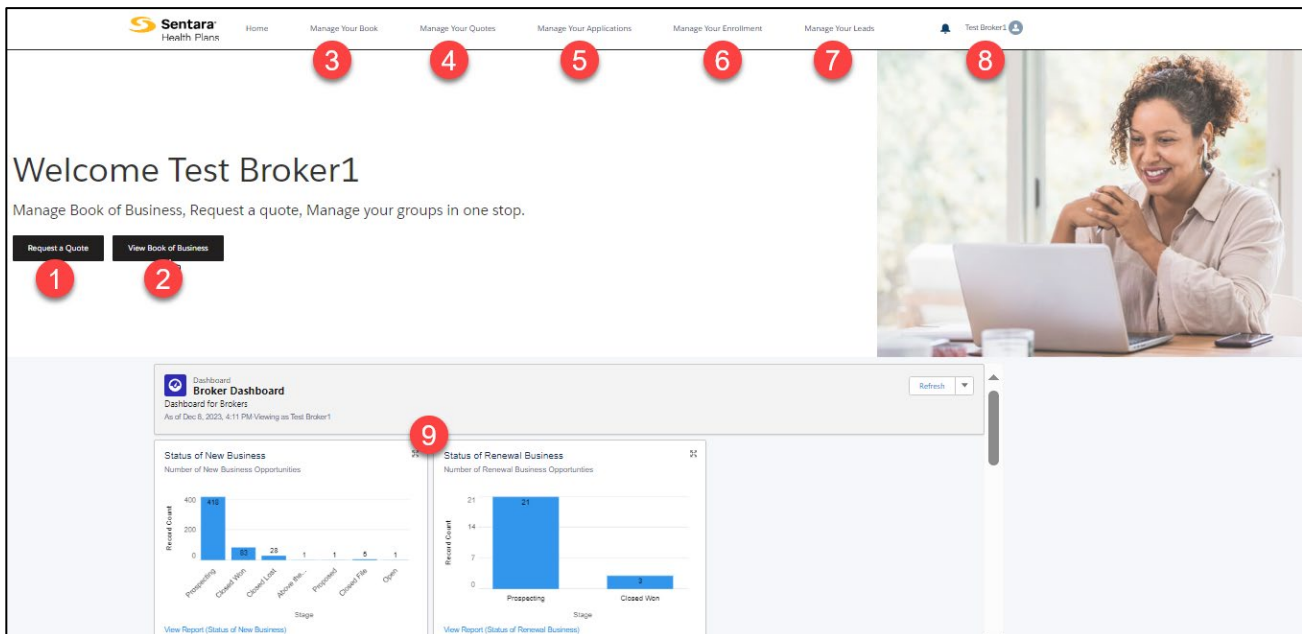
Purpose

The purpose of this user guide is to provide an overview of the eBroker homepage.

Your Homepage

From your eBroker homepage, you can perform the following actions:

1. request a quote
2. view your book of business
3. manage your book of business
4. manage your quotes
5. manage your applications
6. manage your enrollment
7. manage your leads
8. update demographics
9. view and access your dashboards



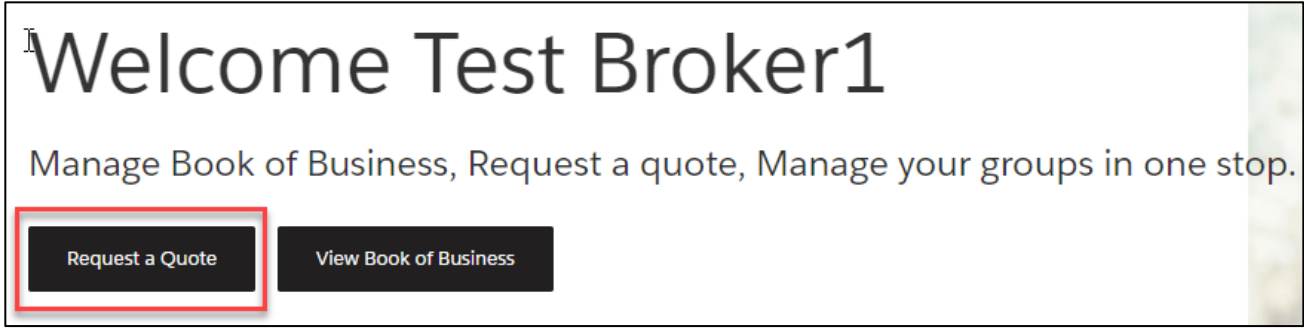
The screenshot shows the eBroker homepage for 'Test Broker1'. The navigation bar at the top includes links for Home, Manage Your Book (3), Manage Your Quotes (4), Manage Your Applications (5), Manage Your Enrollment (6), and Manage Your Leads (7). A notification bell icon is labeled 'Test Broker1' (8). The main content area features a 'Welcome Test Broker1' message and a prompt to 'Manage Book of Business, Request a quote, Manage your groups in one stop.' Below this are two buttons: 'Request a Quote' (1) and 'View Book of Business' (2). On the right, there is a photo of a woman working on a laptop. The dashboard section (9) displays two bar charts: 'Status of New Business' and 'Status of Renewal Business'. The 'Status of New Business' chart shows counts for various stages: Prospecting (418), Closed Won (55), Closed Lost (28), Active/Relinquished (1), Proposed (1), Closed/Filed (5), and Other (1). The 'Status of Renewal Business' chart shows counts for Prospecting (21) and Closed Won (3).

Stage	Record Count
Prospecting	418
Closed Won	55
Closed Lost	28
Active/Relinquished	1
Proposed	1
Closed/Filed	5
Other	1

Stage	Record Count
Prospecting	21
Closed Won	3

Request a Quote

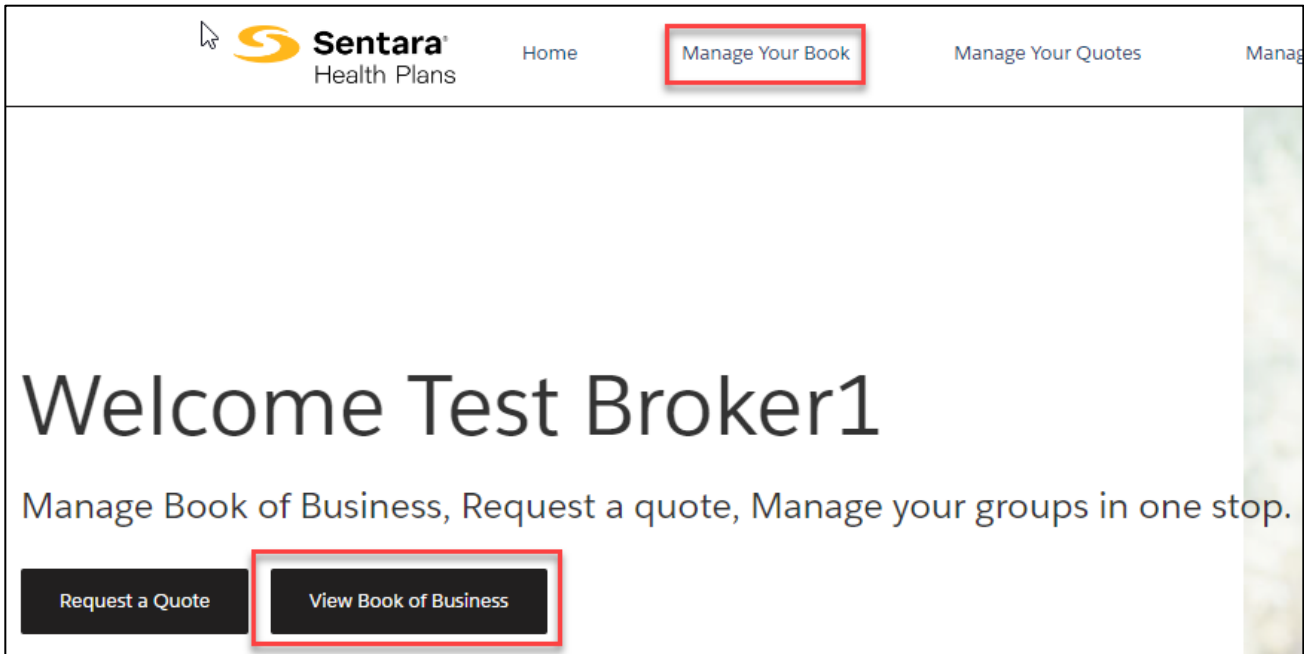
From the homepage of your portal, click on **Request a Quote** to begin a new quote. You can use this button to request a quote for Small Group, Mid-Market and Level Funded.



Please refer to the *Quote Process User Guides* for the quoting process.

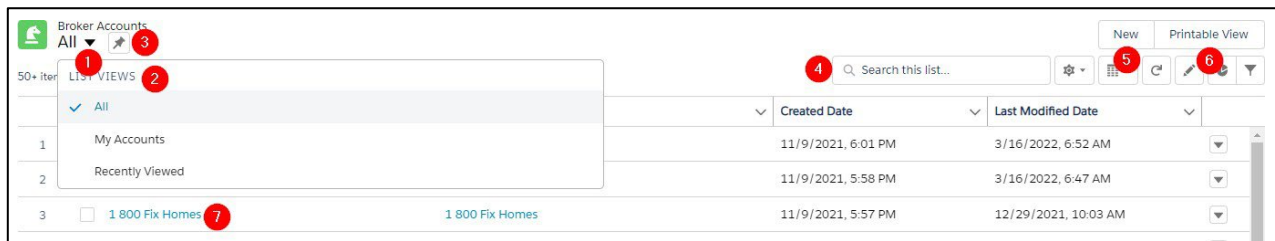
View Book of Business

There are 2 ways you can view your Book of Business from your homepage. You can click **View Book of Business** or **Manage Your Book**.



From the Book of Business screen, you perform do the following activities:

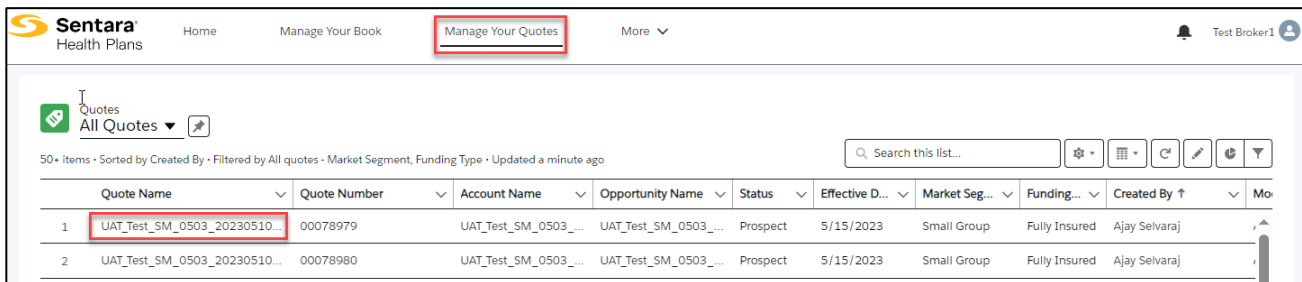
1. adjust your view of accounts by clicking on the arrow by the account list
2. select which list of accounts you would like to view
3. pin a list by clicking on the pushpin image
4. search the list by utilizing the *Search this list* field
5. create a new account by clicking **New**
6. generate a printable view of the list by clicking **Printable View**
7. manage your group’s enrollments by clicking on the **account name**




For additional Book of Business functionalities, please refer to the *Book of Business User Guide* and *Member Enrollment for Brokers User Guide*.

Manage Your Quotes

Click **Manage Your Quotes** to view all your quotes. To view a specific quote, click on the **Quote Name**.




On the Quote Detail screen, you will see the quote information, the status of the quote and be able to perform quote actions.



Quote
Test 12/1/2021 Annie Broker

Generate Proposal Clone Quote Close Quote

Quote Number	Expiration Date	Opportunity ID	Status	Type
00059470	11/30/2022	Test 12/1/2021	Final Review	New Business




Details Related


Quote Number 00059470	Effective Date 12/1/2021
Quote Name Test 12/1/2021 Annie Broker	Expiration Date 11/30/2022
Opportunity Name Test 12/1/2021	Renewal Month December

Manage Your Applications

Click **Manage Your Applications** to view all your applications. Click on the **Application Name** to access the application's page.







Note: The *Application Name* is system generated.












Applications
All 

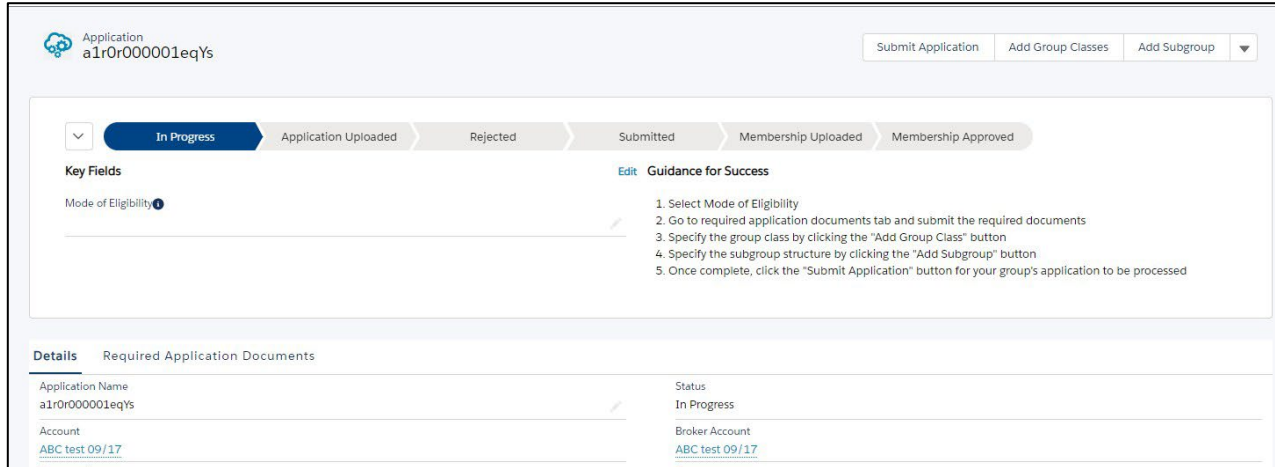
New Printable View

9 items • Sorted by Account • Filtered by All applications • Updated a few seconds ago

<input type="checkbox"/>	Account ↑	Application Name	Status	Opportunity	Quote	Broker Account	Created Date	
1	<input type="checkbox"/> ABC test 09/17	a1r0r000001eqYs	In Progress	ABC test 09/17 10/1...	ABC test 09/17 10/1...	ABC test 09/17	9/17/2021, 6:31 AM	
2	<input type="checkbox"/> ABC Test 9-2-21 SG C...	a1r0r000001epSI	In Progress	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	9/2/2021, 5:41 AM	
3	<input type="checkbox"/> ABC Test Aug 18	a1r0r000001ep4p	Application Uploaded	ABC Test Aug 18 12/1...	ABC Test Aug 18 202...	ABC Test Aug 18	8/25/2021, 11:01 AM	
4	<input type="checkbox"/> ABC Test Aug 20	a1r0r000001eoOq	In Progress	ABC Test Aug 20 12/1...	ABC Test Aug 20 12/...	ABC Test Aug 20	8/20/2021, 4:00 AM	
5	<input type="checkbox"/> American Dream Lan...	a1r0r000001ewKI	Membership Uploaded	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:20 AM	
6	<input type="checkbox"/> American Dream Lan...	a1r0r000001ewKc	Submitted	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:22 AM	
7	<input type="checkbox"/> Test	a1r0r000001fNBj	In Progress	Test 12/1/2021	Test 12/1/2021 Anni...	Test	11/2/2021, 1:59 PM	
8	<input type="checkbox"/> Test Group	a1r0r000001fMY6	In Progress	Test Group 11/1/2021	Test Group 11/1/202...	Test Group	10/28/2021, 7:20 AM	
9	<input type="checkbox"/> Test2	a1r0r000001fMV...	Application Uploaded	Test2 12/1/2021	Test2 12/1/2021 An...	Test2	10/27/2021, 12:19 PM	

On the application detail screen, you will be able to view all information related to the application, view and upload Required Application Documents and perform application activities if applicable.



Details	Required Application Documents
Application Name a1r0r000001eqYs	Status In Progress
Account ABC test 09/17	Broker Account ABC test 09/17

To learn more about managing your applications please refer to the *Application Process for Brokers User Guide*.

Manage Your Enrollment

Click **Manage Your Enrollment** to view all your accounts. Click on the **Account Name** to view an account.



	Account Name ↑	Account Site	Billing State/...	Phone	Type	Account Owner ...
1	Advance Safety Equipment Company		Virginia	(757) 248-8802	Customer	muser
2	Blue Ridge Regional Jail Authority		Virginia	434-847-3100 Ext. 210	Customer	muser

To learn more about managing enrollment please refer to the *Member Enrollment for Brokers User Guide*.

Manage Your Leads

Click **Manage Your Leads** to view all your leads. Click on the **Lead Name** to view a lead.

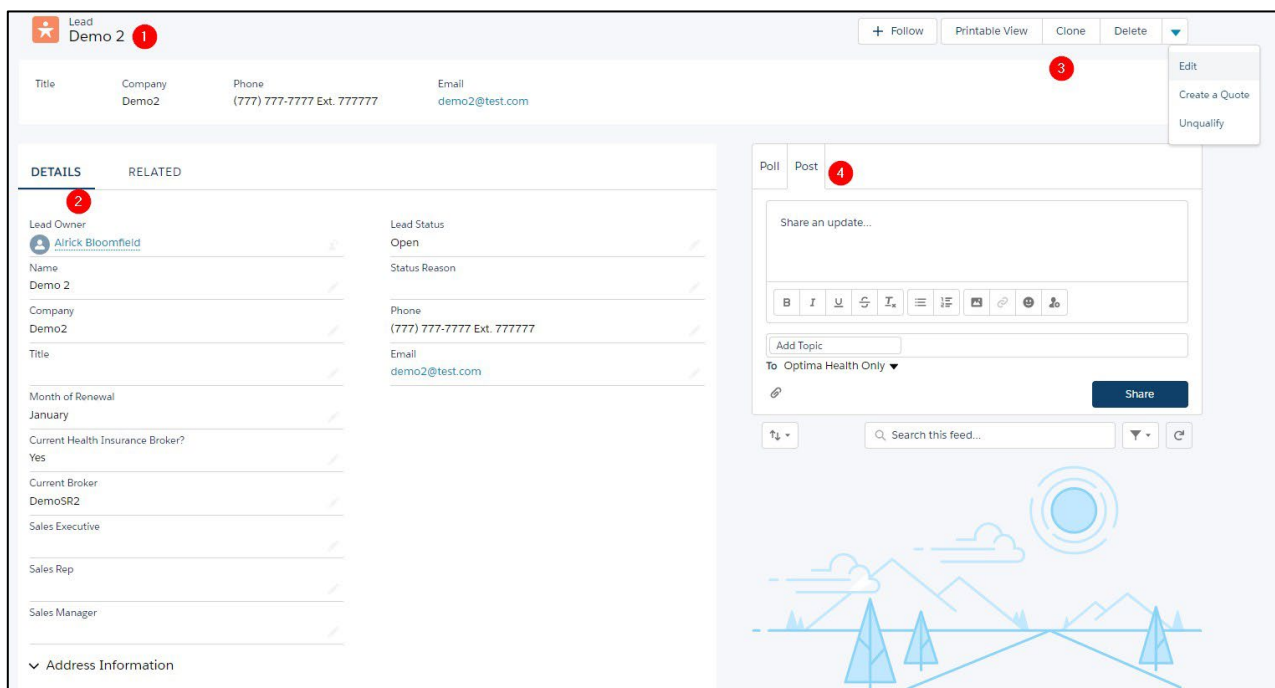


	Name ↑	Company	Phone	N...	Sales Rep	Lead ...	Created Date	Email
1	Andy Smith	Universal Technologies	(555) 555-1212			Open	2/25/2021, 7:34 PM	info@salesforce.com
2	Demo 2	Demo2	(777) 777-7777 Ext. 777777	2-24		Open	5/3/2022, 4:59 PM	demo2@test.com

On the Lead Details screen, you can access a variety of information and functions.

You can:

1. view high level demographic details
2. view and edit specific information related to the lead. To make an edit to a field, hover over the field and click the pencil icon on the right of the field. Remember to click **Save** after making your edits
3. perform a variety of functions related to the lead including **Follow, Clone, Delete, Edit, Create a Quote, Unqualify** viewing a **Printable View**
4. make a post/share an update related to the Lead. Select who to send the update to and click **Share**



Lead Demo 2

[+ Follow](#)
[Printable View](#)
[Clone](#)
[Delete](#)

Title	Company	Phone	Email
	Demo2	(777) 777-7777 Ext. 777777	demo2@test.com

DETAILS

Lead Owner: [Alick Bloomfield](#)

Name: Demo 2

Company: Demo2

Title: Demo2

Month of Renewal: January

Current Health Insurance Broker?: Yes

Current Broker: DemoSR2

Sales Executive: Sales Executive

Sales Rep: Sales Rep

Sales Manager: Sales Manager

Address Information

RELATED

Lead Status: Open

Status Reason: Status Reason

Phone: (777) 777-7777 Ext. 777777

Email: demo2@test.com

Post

Share an update...

B I U **Link** **Image** **Video** **Embed** **More**

Add Topic

To: Optima Health Only

Share

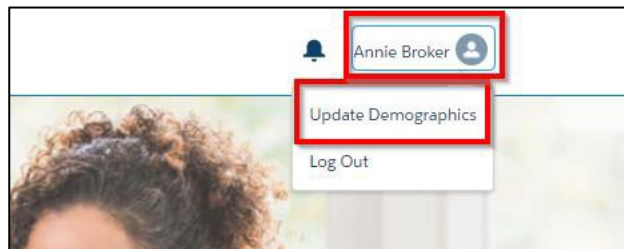
Edit

Create a Quote

Unqualify

Update Demographics

To update your account demographics, click on the grey avatar in the upper right-hand corner on your homepage. Click **Update Demographics**. Fill out the information and click **Update**.



Update Information

Please confirm the information below is updated and accurate

✓ Update Phone Number

Phone Number

✓ Update Address and Other Information

Update Address, Agency, Email, Last Name or Tax ID ⓘ

Access Dashboards

There are a variety of dashboards available from your homepage.

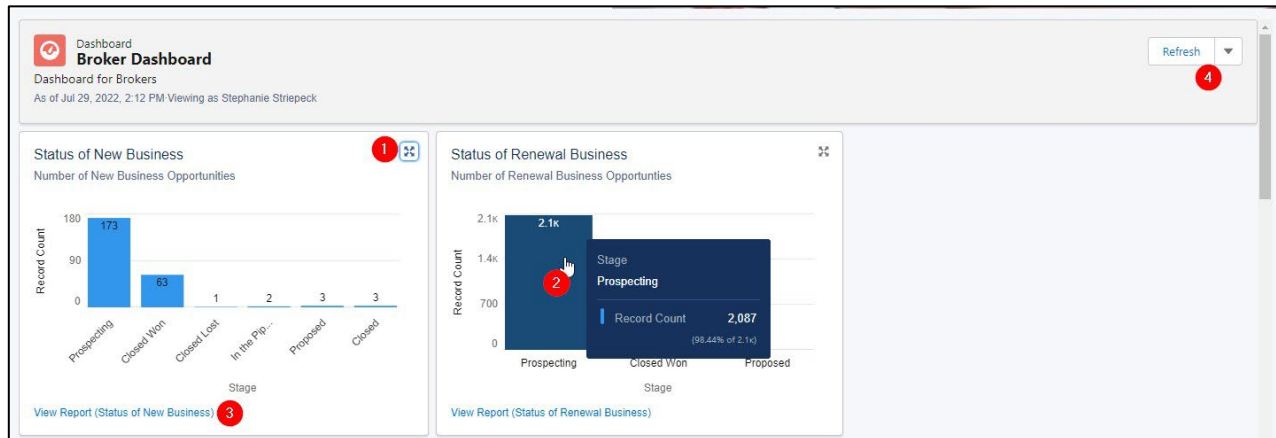
Current dashboards include:

- Status of New Business
- Status of Renewal Business
- Retention Rate of Brokers
- Renewals by Account, and
- Quotes Converted to Active Enrollment

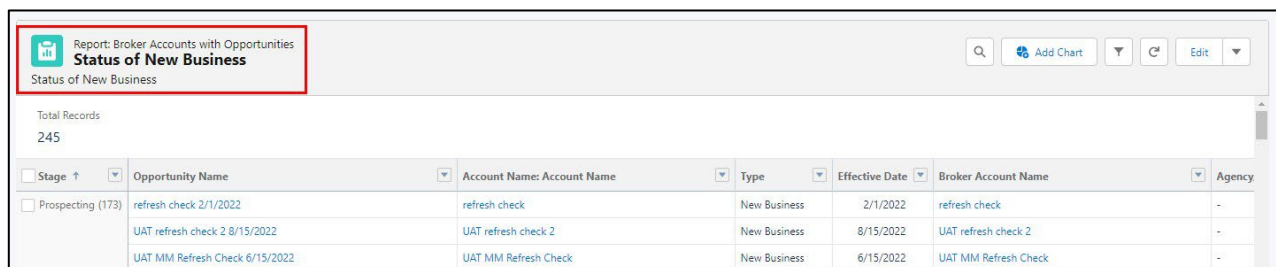
All dashboards are:

1. expandable to a larger view
2. interactive; hover over a graphical element to learn more
3. viewable on a new screen (clicking “View Report” will lead you to the detailed information; see example below)
4. refreshable

Note: Click the arrow to the right of the Refresh button to download an image of all your dashboards.



Below is the detailed report generated upon clicking **View Report (Status of New Business)** below the associated dashboard. From this page you can access a variety of functions.



Stage	Opportunity Name	Account Name: Account Name	Type	Effective Date	Broker Account Name	Agency
Prospecting (173)	refresh check 2/1/2022	refresh check	New Business	2/1/2022	refresh check	-
	UAT refresh check 2 8/15/2022	UAT refresh check 2	New Business	8/15/2022	UAT refresh check 2	-
	UAT MM Refresh Check 6/15/2022	UAT MM Refresh Check	New Business	6/15/2022	UAT MM Refresh Check	-