



## ESB Surety Bond Producer Dashboard Guide

The Surety Bond Producer Dashboard provides surety bond producers with summary information for bonds where the producer is the active producer on the bond. Users can use links from the Dashboard to access relevant pages in NMLS. See *Figure 1* for an image of the *Surety Bond Producer Dashboard*, located under the Home Tab.

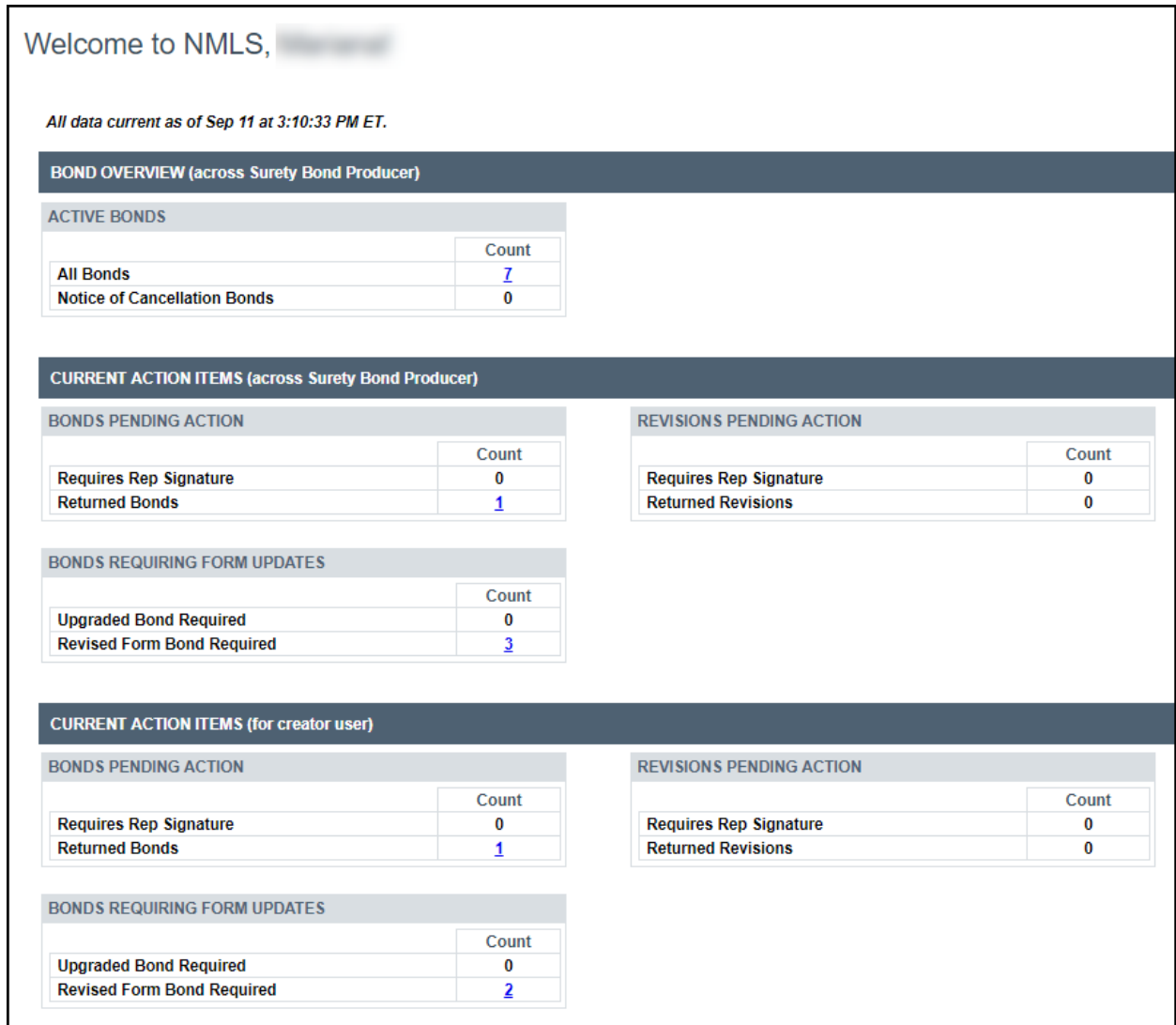


Figure 1: ESB Industry Dashboard

Below is a breakdown of each section, including link destinations and common usage.

## Bond Overview (across Surety Bond Producer)

BOND OVERVIEW (across Surety Bond Producer)	
ACTIVE BONDS	
	Count
All Bonds <b>A</b>	<a href="#">7</a>
Notice of Cancellation Bonds <b>B</b>	0

Figure 2: Active Bonds

### Active Bonds (see Figure 2)

	Heading	Used To	Destination
<b>A</b>	All Bonds	View the number of active bonds	"Manage Bonds" page
<b>B</b>	Notice of Cancellation Bonds	View the number of bonds in <i>Notice of Cancellation Status</i>	"Manage Bonds" page

Table 1: Active Bonds

## Current Action Items (across Surety Bond Producer)

BONDS PENDING ACTION	
	Count
Requires Rep Signature <b>C</b>	0
Returned Bonds <b>D</b>	<a href="#">1</a>

Figure 3: Bonds Pending Action

### Bonds Pending Action (see Figure 3)

	Heading	Used To	Destination
<b>C</b>	Requires Rep Signature	View the number of bonds in <i>Requires Rep Signature</i> status	"Manage Bonds" page
<b>D</b>	Returned Bonds	View the number of bonds in <i>Returned to Safety</i> status	"Manage Bonds" page

Table 2: Bonds Pending Action

REVISIONS PENDING ACTION		Count
Requires Rep Signature <b>E</b>		0
Returned Revisions <b>F</b>		0

Figure 4: Revisions Pending Action

**Revisions Pending Action (see Figure 4: Revisions Pending Action)**

	Heading	Used To	Destination
<b>E</b>	Requires Rep Signature	View the number of riders/revised form bonds in <i>Requires Rep Signature</i> status	"Manage Bonds" page
<b>F</b>	Returned Revisions	View the number of riders/revised form bonds in <i>Returned to Surety</i> status	"Manage Bonds" page

Table 3: Revisions Pending Action

BONDS REQUIRING FORM UPDATES		Count
Upgraded Bond Required <b>G</b>		0
Revised Form Bond Required <b>H</b>		3

Figure 5: Bonds Requiring Form Updates

**Bonds Requiring Form Updates (see Figure 5: Bonds Requiring Form Updates)**

	Heading	Used To	Destination
<b>G</b>	Upgraded Bond Required	View the number of bonds in <i>Requires Rep Signature</i> or <i>Returned to Surety</i> status requiring upgrade to a new form version	"Manage Bonds" page
<b>H</b>	Revised Form Bond Required	View the number of bonds requiring surety action for issuance of a revised form bond (bonds requiring revised form bond issuance that do not have a revised form bond in <i>Pending Principal Signature</i> status or an "Undelivered" revised form bond in <i>Executed</i> status)	"Manage Bonds" page

Table 4: Bonds Requiring Form Updates

**NOTE:** This section will only display if at least one row count is > 0.

## Current Action Items (for creator user)

BONDS PENDING ACTION	
	Count
Requires Rep Signature	0
Returned Bonds J	1

Figure 6: Bonds Pending Action

### Bonds Pending Action (see Figure 6: Bonds Pending Action)

	Heading	Used To	Destination
I	Requires Rep Signature	View the number of bonds created by the logged-in user in <i>Requires Rep Signature</i> status	"Managed Bonds" page
J	Returned Bonds	View the number of bonds created by the logged-in user in <i>Returned to Surety</i> status	"Managed Bonds" page

REVISIONS PENDING ACTION	
	Count
Requires Rep Signature K	0
Returned Revisions L	0

Figure 7: Revisions Pending Action

### Revisions Pending Action (see Figure 7: Revisions Pending Action)

	Heading	Used To	Destination
K	Requires Rep Signature	View the number of riders/revised form bonds created by the logged-in user in <i>Requires Rep Signature</i> status	"Managed Bonds" page
L	Returned Bonds	View the number of riders/revised form bonds created by the logged-in user in <i>Returned to Surety</i> status	"Managed Bonds" page

BONDS REQUIRING FORM UPDATES	
	Count
Upgraded Bond Required <b>M</b>	0
Revised Form Bond Required <b>N</b>	<u>2</u>

Figure 8: Bonds Requiring Form Updates

**Bonds Requiring Form Updates (see Figure 8)**

	Heading	Used To
<b>M</b>	Upgraded Bond Required	View the number of bonds created by the logged-in user in <i>Requires Rep Signature</i> or <i>Returned to Surety</i> status requiring upgrade to a new form version
<b>N</b>	Revised Form Bond Required	View the number of bonds created by the user requiring surety action for issuance of a revised form bond (bonds requiring revised form bond issuance that do not have a revised form bond in <i>Pending Principal Signature</i> status or an undelivered revised form bond in <i>Executed</i> status)

For assistance, please contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123).