InsuranceXdate.com Quick Start Guide (v. 2.0)
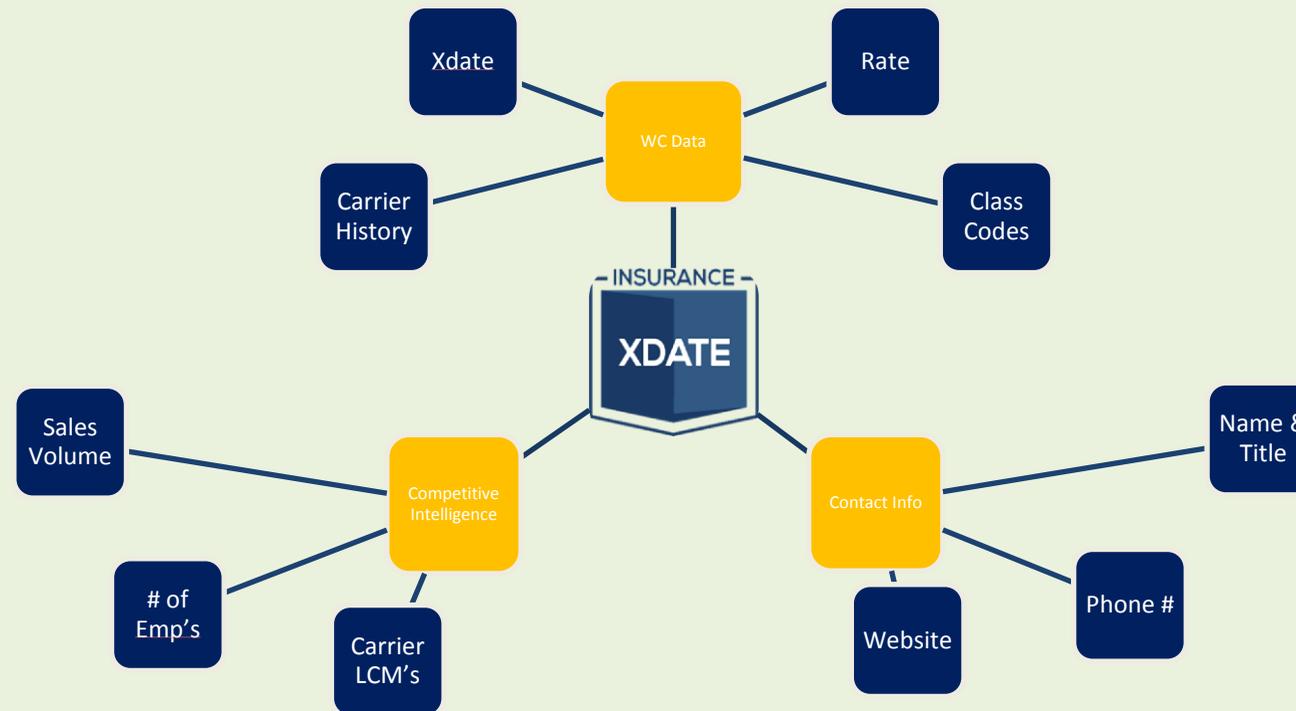
This guide is meant to help you make the most of your **Free Trial. It is only 2 hours so don't waste it!**

All features, data & states are available during the trial. You cannot Export during the Trial.

Works best on Chrome or Safari. Newer versions of IE as well.

The sections below are **abbreviated versions of the full User Guide** and many sections have been removed all together.

Please refer to the full version of the User Guide for further information.

Go to www.InsuranceXdate.com

The purpose of the trial is to **familiarize** yourself with our service and more importantly to **validate the accuracy** of our data

Complete the brief form and click 'Join Us'

This will take you to your Dashboard and your 2 hour trial begins!

Dashboard

Trial Expires in: 19065:14:33   Dashboard   Saved ▾   History ▾   Subscribe   ▾

Saved Searches   Last Run

San An	09-01-2016
AZ local contractors	09-01-2016
CT Contractors	09-01-2016
PA Carrier Chk - 140 days out (8/14/16)	09-01-2016
dallas hvac and electrical	08-31-2016
CO local restaurants and auto	08-29-2016
TN Health Care	08-21-2016
Reno show	08-19-2016
Brevard Renewals 1-1	08-19-2016
Ny - rtl/whl	00-00-0000
NY - service Ind	00-00-0000

Prospect Funnel

- 1284   Business Views
- 15   Contacted
- 6   Appt Scheduled
- 5   Quoting
- 4   Account Written

1 day | 7 day | 30 day | 60 day | 90 day

Latest Flags

Saved Contacted Follow Up Appt Quoting Written

ALLIED ELECTRICAL CONTRACTORS LLC	09-01-2016	contacted
AEROSPACE ALLOYS INC	09-01-2016	quoting
ADVANTAGE EYE CARE LLC	09-01-2016	contacted
ABRAHAM RICHARD I	09-01-2016	contacted
AAZ PAINTING LLC Appt: 9-02-2016 11:00 AM	09-01-2016	appt
A SPECIAL PLACE LLC	09-01-2016	quoting
B&E PUMP CO INC	08-31-2016	contacted
ACE WORLDWIDE ENTERPRISES INC Appt: 9-01-2016 1:15 PM	08-31-2016	appt
LMI LANDSCAPES	08-24-2016	followup
Advent Lutheran Church	08-20-2016	quoting
RURAL LIFE FOUNDATION INC	08-19-2016	quoting
Advent Lutheran Church Of Goschenhoppen	08-17-2016	contacted
Zottola Construction Inc	08-16-2016	followup
Eureka Metal & Glass Services Inc	08-16-2016	contacted
ANGEL GLOBAL GROUP INC	08-16-2016	quoting
AMICI MARKET LLC	08-16-2016	written
Baldoni Electric Inc	08-16-2016	appt
B&b Mini Mart Ellport Junction	08-16-2016	appt
Ardmore Animal Hospital Llc	08-16-2016	appt

SEARCH   Search   Reset   💾

📍 Location   Zipcode

| State | Texas ▾ |
| County | All ▾ |

ℹ️ Policy Info   Range

Effective Dates
MM-DD   To   MM-DD

Class Code
All ▾

SIC Code
All ▾

Current Carrier   Include
All ▾

📊 Company

Name
[   ]

Annual Premium
[   ]   To   [   ]

Employees
All ▾   To   All ▾

Company Size
All ▾   To   All ▾

Addl. Options
All ▾

Search   Reset

The Dashboard is the 'home' page for our members.
As long as you are logged in, you will arrive here when going to www.insurancexdate.com

Site Navigation Access other areas of the website via the navigation bar. Each button has a drop down menu.

Search Criteria for creating prospecting lists is available here.

Search Criteria

SEARCH — Search | Reset

Location — Zipcode
- State: Texas
- County: All

Policy Info — Range
- Effective Dates: MM-DD To MM-DD
- Class Code: All
- SIC Code: All
- Current Carrier: Include — All

Company
- Name:
- Annual Premium: To
- Employees: All To All
- Company Size: All To All
- Addl. Options: All

Search | Reset

Location -
- Search criteria adjusts based on what is available for the selected **state**
- Toggle between **County and Zip Code radius** for location based search criteria by clicking on the button

Policy Info -
- **WC policy Expiration Date Range**
- **Industry by Primary WC Class Code or SIC**
  - Search by **Pick List or Range**
- **Current Carrier**
  - Target businesses insured with specific Carriers or use the *Exclude* switch to exclude those businesses
- **Experience Mod Range (not available in all states)**

Company -
- Search by business Name (name only search)
- Manual WC Premium (not available in all states)
- # of Employees
- Gross Sales Volume
- Additional Options (Vary by state)
  - PEO Accounts
  - Assigned Risk Accounts
  - Filter businesses only with email or phone

Location — County
- State: Texas
- Within [Miles] of [Zipcod]

Policy Info — Multi
- Effective Dates: 10-01 To 11-30
- Class Code: 0 - All To 0 - All
- SIC Code: 0 - All To 0 - All
- Current Carrier: Include — All

Tip(s)-
- Toggling between zip code radius and county will reset the search fields. Same with switching between class code range & pick list
  - Make these selections before entering search criteria
- When both Class Codes and SIC codes are available it is best to use Class Codes for industry criteria
  - All businesses will have a Class Code whereas not all will have an SIC
  - Class Codes have been approved by the state's rating bureau as primary
- If you are unsure of the class code you want there is a search box in the Pick List option to search Codes by description

Search Results & Saving a Search for Future Use

Sort list ascending or descending by clicking any header (Name, Exp Date, etc)

Scroll your list results here

Tip(s):
- Sort your search BEFORE saving as this is what it defaults to for future use

Save your Search:
- **Name** your search something that describes it (e.g. local contractors)
- **Policy Expiration Dates** can be set 'statically' (set dates) or as a **Range** (the system treats the dates you entered as a cycle of time - e.g. today is 9/11/16, using Exp Dates of 10/11 to 12/31 saves a range of 30 to 111 days out, so tomorrow's list will be for Xdates 10/12 to 1/1)

Search Results – List View Navigation

1-10 Of 3438 Results				1 2 3 > >>

Name ▾	Address ▾	Class ▾	Exp. Date ▲	
22ND CENTURY STAFFING INC	35 GLENLAKE PKWY ATLANTA, GA 30328	8810 Clerical Office Employees. NOC	09-25-2016 AR	⚑ 1☎ 0✏
360 PAINTING OF NORTH GEORGIA TA www.Cumming.360painting.com	1530 LALEIAH DR CUMMING, GA 30041	5474 Painting or Paperhanging NOC	09-25-2015 AR	⚑ 1☎ 0✏
4228 BUENA VISTA RD LLC	4228 BUENA VISTA RD COLUMBUS, GA 31907	8006 Gas Station: Self-Service/Conv	09-25-2016	⚑ 1☎ 0✏
AAJC CONSTRUCTION LLC	2162 WEXFORD DR NORCROSS, GA 30071	5437 Carpentry - Interior Trim & Ca	09-25-2016	⚑ 1☎ 0✏
ABATEMENT CONTRACTORS UN LTD LLC www.abatementcu.com	4355 COBB PKWY SE, STE J-202 ATLANTA, GA 30339	5473 Asbestos Contractor NOC	09-25-2016 AR	⚑ 1☎ 0✏
ABBEY INSURANCE www.atlantaunity.org	7050 JIMMY CARTER BLVD, STE 206Q NORCROSS, GA 30092	8723 Insurance Co. - Including Cler	09-25-2016	⚑ 1☎ 0✏

Policy Type Indicator will display here (not available in all states)
- AR = Assigned Risk
- PEO = Professional Employer Org

The phone & notepad icons indicate if contact or note information is available.
- 1 = 1 contact/note

If a website is available, a link will be below the business name. Click to open in a new tab

Clicking anywhere on a business listing will display additional information for that business (Contact, Carrier, Notes, etc) – see the following page for further details

Viewing Business Details – Modal Window

This is a **Modal Window** – it displays the **details** for a business.

Flag Type

WC/Business Details

Demographic Info

Policy/Call Toggle

Business Info

Contact Info

The **[+]** button allows you to **add your own info** (contact, demographic and notes)

Current Term – Class Code by default (inc. LC). If Class not available displays **SIC**

Carrier History – includes available Carrier history and their current **LCM**

Notes & Flag diary

Scroll to prev/next business

Flag Acct

Print Page

BOARDWALK PIZZERIA **QUOTING**
1420 W 104TH AVE
NORTHGLENN, CO 80234
SIC: 5812, Eating Places
Class: 9083, Fast Food Restaurant

FEIN: 841336663
ID: 0331584
Expiration: 12-01-2016
Renewal Mod: 0

Employees   5-9
Company Size   < $1 Million
Standard Premium $1,633

Policy | Call   ✕

[+]

Contacts	[+]

LINDA GERCKEN, OWNER
Owner
303-280-2233
boardwalkpizzeria@gmail.com

303-280-2233

Current Term			
Class Code	Description	Loss Cost	Mod Rate
9083	Fast Food Restaurant	1.48	1.8648

Carrier History			
Policy Term	Exp. Mod	Carrier	LCM
12-01-2015 - 12-01-2016	-	PINNACOL ASSURANCE	1.26000
12-01-2014 - 12-01-2015	-	PINNACOL ASSURANCE	1.26000
12-01-2013 - 12-01-2014	-	PINNACOL ASSURANCE	1.26000
12-01-2012 - 12-01-2013	-	PINNACOL ASSURANCE	1.26000
12-01-2011 - 12-01-2012	-	PINNACOL ASSURANCE	1.26000
More			

Notes	[+]

Agent	Date	Note
Rob	09-12-2016	quoting flag

☐ Auto-Dial ?   Hangup   Not Calling   ?   ◢ Flag ▲   🖶 Print   ← Prev   Next →