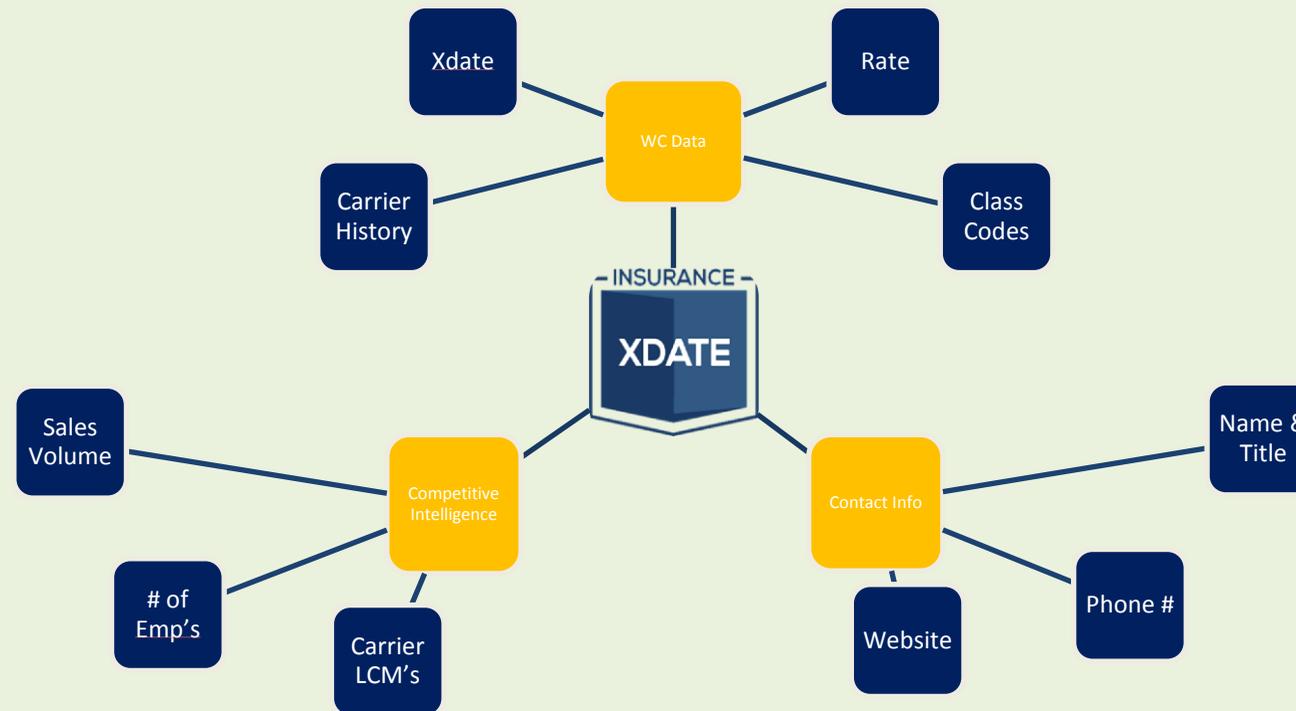


InsuranceXdate.com Quick Start Guide (v. 2.0)



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



EVERYTHING A COMMERCIAL INSURANCE AGENT NEEDS TO MAKE THE CALL

Email Password

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INNOVATIVE LEADS FOR COMMERCIAL INSURANCE AGENTS

InsuranceXdate.com is a prospect and lead management system for commercial insurance agencies that is designed to bring more efficiency to the new business production process. Whether you are at the office, home or on the road you can access any business's information and immediately know when their policy renews, their industry, the rate they're paying, their current WC Carrier, their contact information and more. Agencies using our system are more productive because they generate a higher volume of qualified opportunities and spend less time on prospecting tasks, leaving them with more time for actual selling.

TRY IT NOW WITH THESE XDATES

From: To:

JOIN NOW FOR FREE

*This will be your name for Login

How did you hear about us?
 Request Demo

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

The dashboard is divided into several sections:

- Saved Searches:** A table listing various search criteria and their last run dates.
- Latest Flags:** A table listing companies with their status (e.g., contacted, quoting, appt) and dates.
- Prospect Funnel:** A funnel chart showing the progression of prospects through different stages: Business Views (1284), Contacted (15), Appt Scheduled (6), Quoting (5), and Account Written (4).
- SEARCH:** A search filter section with various criteria like Location, Policy Info, Class Code, SIC Code, Current Carrier, and Company.

Search Name	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 - ft/whl	00-00-0000
NY - service lnd	00-00-0000

Company Name	Date	Status
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

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

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

Location County

State Texas

Within Miles of Zipcod

Policy Info -

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

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

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)
 - o PEO Accounts
 - o Assigned Risk Accounts
 - o Filter businesses only with email or phone

Tip(s)-

- Toggling between zip code radius and county will reset the search fields. Same with switching between class code range & pick list
 - o 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
 - o All businesses will have a Class Code whereas not all will have an SIC
 - o 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

See **total # of businesses** for your list here

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

Scroll your list results here

1-10 Of 34 Results

Name	Address	Class	Exp. Date	
FORWARD MFG Forwardmfginc.com	3454 N SAN MARCOS PL CHANDLER, AZ 85224	7841 Reupholstery and Furniture Repair	01-01-2017	
HEADWAITER furnituremedicalsolutions.com	2540 N 35TH AVE PHOENIX, AZ 85009	7841 Reupholstery and Furniture Repair	01-01-2017	
P D M REFURBISHING Restor-To-Nu.com	4011 E COLUMBIA ST TUCSON, AZ 85714	7841 Reupholstery and Furniture Repair	01-01-2017	
PDM REFURBISHING Restor-To-Nu.com	4011 E COLUMBIA ST TUCSON, AZ 85714	7841 Reupholstery and Furniture Repair	01-01-2017	
RESTOR TO NU www.restortonu.com	4011 E COLUMBIA ST TUCSON, AZ 85714	7841 Reupholstery and Furniture Repair	01-01-2017	
CREATIVE COLORS INTL www.creativecolorsintl.com	5547 E DOLPHIN AVE MESA, AZ 85206	7841 Reupholstery and Furniture Repair	03-01-2017	
P & L AUTO UPHOLSTERY www.pandlauto Upholstery.com	616 N STONE AVE TUCSON, AZ 85705	7841 Reupholstery and Furniture Repair	03-01-2016	
PHOENIX FURNITURE REPAIR & REPLACEMENT	2901 W OSBORN RD PHOENIX, AZ 85017	7841 Reupholstery and Furniture Repair	03-10-2016	
CRANSON CUSTOM UPHOLSTERY www.cransonupholstery.com	2127 S PRIEST DR TEMPE, AZ 85282	7841 Reupholstery and Furniture Repair	04-01-2017	
DAVE RICE UPHOLSTERY www.davericeupholstery.com	13200 N 113TH AVE YOUNGTOWN, AZ 85383	7841 Reupholstery and Furniture Repair	04-01-2017	

Export Call Sheets Bookmark

SEARCH

Location Zipcode

State

County

Policy Info

Effective Dates To

SIC Code

Current Carrier

Company

Name

Employees To

Company Size To

Addl. Options

Search Reset

Save Your Search

Name

Set dates as 10-11 to 12-31

Set dates as range for 30 to 111 days out.

Save

Save Your Search

Name

Set dates as 01-01 to 12-31

Set dates as range for 112 to 477 days out.

Save

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

Header Row Contains:

- Business Name
- Address (typically mailing, varies by state)
- Primary Class Code or SIC Code if Class is not available
- WC Exp Date

1-10 Of 3438 Results

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

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

The **phone & notepad icons** indicate if contact or note information is available.

- 1 = 1 contact/note

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

BOARDWALK PIZZERIA QUOTING

1420 W 104TH AVE
NORTHGLENN, CO 80234
SIC:
Class:

5812, Eating Places
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 5-9

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 →

Flag Acct

Print Page