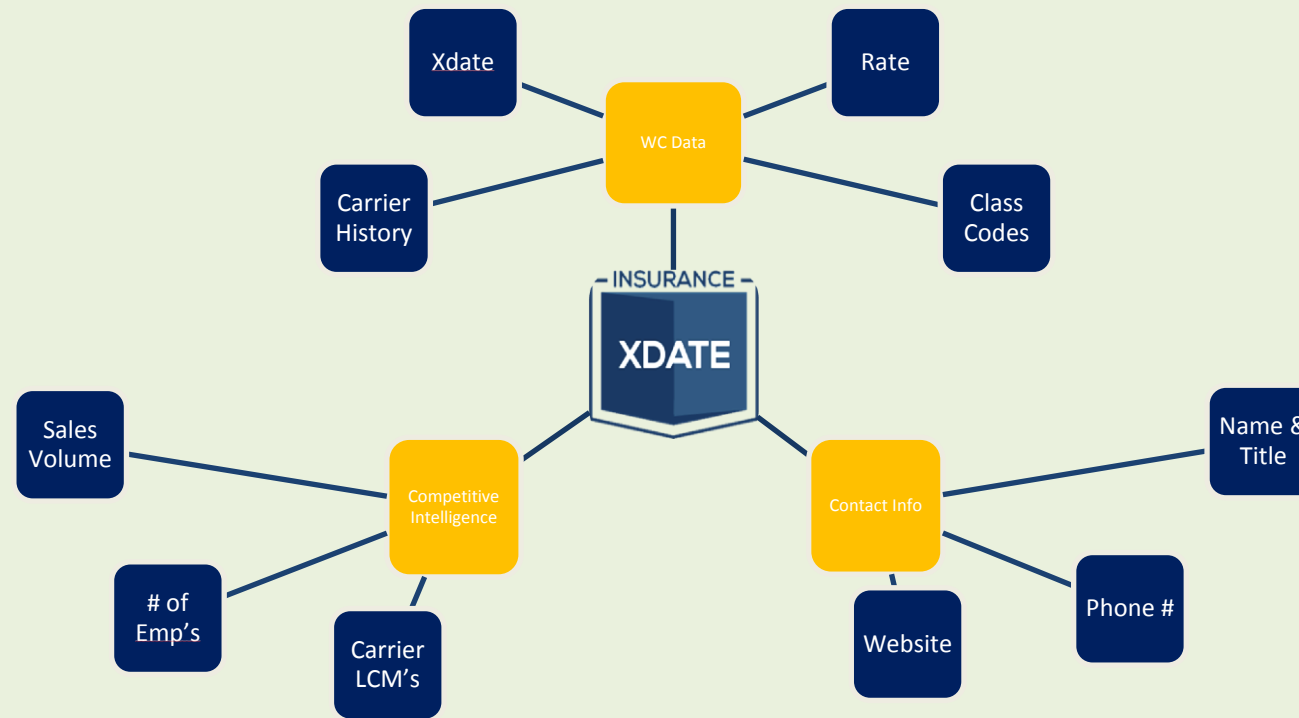


InsuranceXdate.com User Guide (v. 2.0)



This guide is a lot of **screen shots** and 

It is best to have handy while actually navigating the site.

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

Contact:

Office: 215-839-9991

Email: support@insuranceXdate.com

***email is best!**

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Dashboard

The dashboard screenshot shows the following sections:

- Saved Searches:** A list of search criteria with columns for the search name and the last run date. Searches include "San An", "AZ local contractors", "CT Contractors", "PA Carrier Chk - 140 days out (8/14/16)", "dallas hvac and electrical", "CO local restaurants and auto", "TN Health Care", "Reno show", "Brevard Renewals 1-1", "Ny - ft/whl", and "NY - service lnd".
- Prospect Funnel:** A funnel chart showing the number of prospects at different stages: Business Views (1284), Contacted (15), Appt Scheduled (6), Quoting (5), and Account Written (4). Time filters for 1 day, 7 day, 30 day, 60 day, and 90 day are available.
- Latest Flags:** A table of flagged prospects with filter buttons (Saved, Contacted, Follow Up, Appt, Quoting, Written) at the top. The table lists company names, dates, and flag types (e.g., contacted, quoting, appt, followup).
- SEARCH:** A search filter panel with sections for Location (State: Texas, County: All), Policy Info (Effective Dates, Class Code, SIC Code, Current Carrier), and Company (Name, Annual Premium, Employees, Company Size, Addl. Options).

Saved Searches on your Dashboard are sorted in the order you have last used them. So your most frequently used searches will be available here.

Prospect Funnel gives you a snapshot of your activity based on flagging companies

Latest Flags show your flagged prospects. The list is ordered with the most recently flagged prospects at the top.

Click a flag button on top of the list to **filter** the window.

You can view prospects' data directly from the dashboard by clicking on the prospect. The display is called a modal.

Each 'Flag' has its own page accessed via the Site Navigation menu.

(Flag functionality and usage will be explained later)

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

Tip(s) -

- In **Mod states (PA, NJ, DE)** you can remove **Merit/NQ accounts from your list** using the Mod Range criterion and entering a range of 0.1 to 4.9 – this will eliminate non-Mod rated results

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

Export Call Sheets Bookmark

SEARCH

Location Zipcode

State Arizona

County All

Policy Info Range

Effective Dates 01-01 To 12-31

SIC Code 7641 - Reupholstery and Furniture Rep

Current Carrier Include All

Company Name

Employees All To All

Company Size All To All

Addl. Options All

Search Reset

10 Listing

Export, Print or Bookmark buttons (explained in further detail later)

Save Your Search

Name AZ - Furniture Repair Stores

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

Adjust number of results per page here (10, 25 or 50 listings per page)

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	
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	
4228 BUENA VISTA RD LLC	4228 BUENA VISTA RD COLUMBUS, GA 31907	8006 Gas Station: Self-Service/Conv	09-25-2016	
AAJC CONSTRUCTION LLC	2162 WEXFORD DR NORCROSS, GA 30071	5437 Carpentry - Interior Trim & Ca	09-25-2016	
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	
ABBEY INSURANCE www.atlantaunity.org	7050 JIMMY CARTER BLVD, STE 206Q NORCROSS, GA 30092	8723 Insurance Co. - Including Cler	09-25-2016	

Policy Type Indicator will display here (not available in all states)

- AR = Assigned Risk
- PEO = Professional Employer Org

Click the **flag button** to flag an account using one of the available options from the drop down menu (explained later)

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)

Enable/disable **Auto-Dial**

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

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

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

Call Status

Flag Acct

Print Page

When **Auto-Dial** is enabled the next call to the next prospect in your list is done **automatically** after ending your call.

Flagging Functionality - In Modal Window

The screenshot shows a 'Carrier History' table with columns: Policy Term, Exp. Mod, Carrier, and LCM. Below the table is a 'Notes' section with columns: Agent, Date, and Note. A context menu is open over the 'Flag' button, listing options: Save, Contacted, Follow Up, Appointment, Quoting, Account Written, Call Next Year, Hide, and Remove Flag.

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

Agent	Date	Note
Rob	09-12-2016	Appointment set for 9-13-2016 12:00 PM

Flagging an account will date/time stamp when the flag was made along with the user who flagged the account. This way others within your agency will know you are actively working it.

Flags are meant to mimic the sales cycle for Commercial Insurance. Here is what each is meant to represent:

- **Save:** a catch-all flag for general purposes
- **Contacted:** you contacted the account
- **Follow Up:** needs...don't make me repeat myself
- **Appointment:** allows you to add a date/time for the scheduled appointment – displays in Dashboard and Notes sections (does NOT actually remind you)
- **Quoting:** they've passed your rigorous qualification, time to go to work
- **Account Written:** BOOM! Go get that deposit check

Alternatively...

- **Call Next Year:** can't write them all the 1st year
- **Hide:** so the buyer was a liar..tell'em off, burn the bridge and throw them in the trash where they belong
 - o You can **Unhide** a business from the Hide page, accessed via Site Navigation menu

Tip(s):

- From the **Dashboard** you can filter your Latest Flags as an effective way to **blow** through your Follow Up list, among other benefits.

To **flag** an account simply click on the Flag button and choose the appropriate flag.

The 'Latest Flags' filter bar contains buttons for: Saved, Contacted, Follow Up, Appt, Quoting, and Written.

Each Flag category (Save, Follow Up, etc.) has its own **dedicated page**; accessible from **Site Navigation** menu under the Saved drop down tab. (see Navigation Bar section of guide for more info)

The Site Navigation menu shows 'Dashboard', 'Saved', 'History', and 'Subscribe'. The 'Saved' dropdown is open, showing 'Companies', 'Saved', and 'Contacted'.

Exporting

This is the bottom of your **Search Results** page

ARROW ELECTRIC SERVICES INC 2903 NATIONAL DR GARLAND, TX 75041 5190 Electrical Wiring - Within Bui 10-02-2016

Export Call Sheets ▾ Bookmark

1 2 3 > >>

Clicking on the **Export** button will download an **Excel CSV file** to your hard drive

Call Sheets

ARROW ELECTRIC SERVICES INC 2903 NATIONAL DR GARLAND, TX 75041 5190 Electrical Wiring - Within Bui 10-02-2016

Export Call Sheets ▾ Bookmark

Short
Long

1 2 3 > >>

Clicking on the **Call Sheets** button will download a **PDF file** to your hard drive

Short = 1 business per page
Long = 5 businesses per page

Bookmark

ARROW ELECTRIC SERVICES INC 2903 NATIONAL DR GARLAND, TX 75041 5190 Electrical Wiring - Within Bui 10-02-2016

Export Call Sheets ▾ Bookmark

1 2 3 > >>

Clicking on **Bookmark** will **save the page you were on** for that search so you can quickly pick up where you left off

Bookmark page is accessible from the Site Navigation under the Saved drop down tab

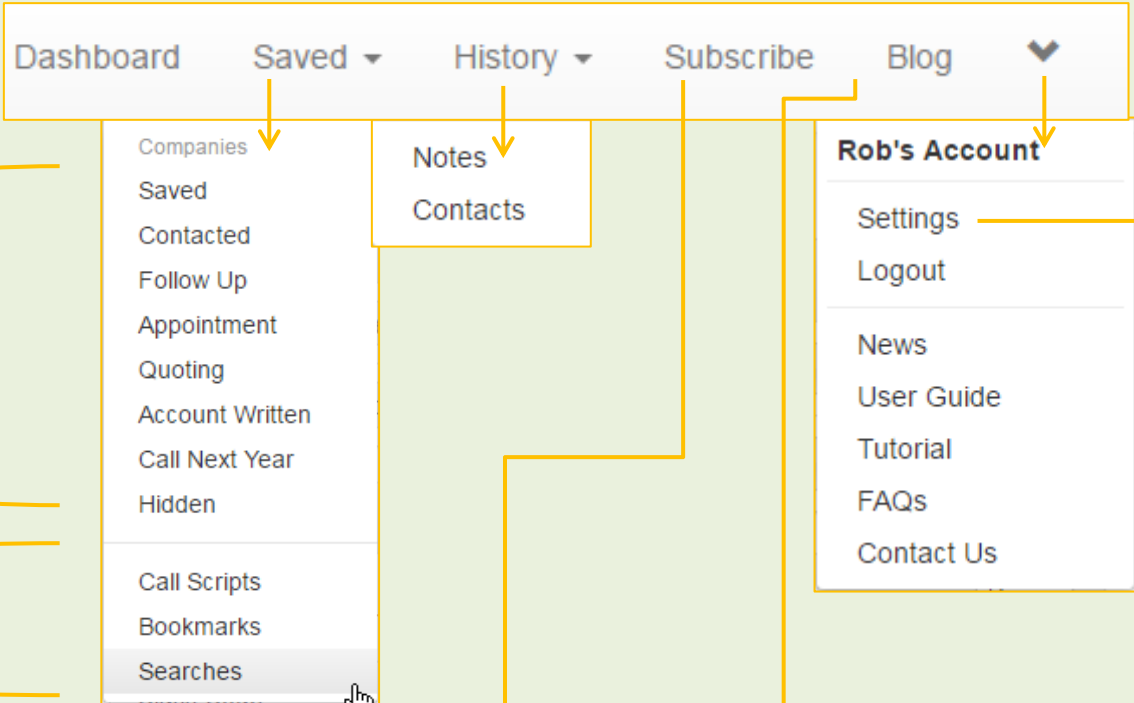
Tip(s):

There is a **90 day restriction** to exporting for monthly billed accounts. Meaning you cannot export more than 90 days in advance of the current date.

Tip(s):

These buttons (**Export, Call Sheets & Bookmark**) are available at the bottom of any page in your search results.

Navigation Bar



Accesses Flag **Folders**

Access Call Scripts, Bookmarks and Searches

Settings menu:

- **Change password**

Master Accts only:

- **Add/delete Agent Accts**

Subscription menu, add/modify service, give us \$\$\$\$

Yup, we have a **Blog**

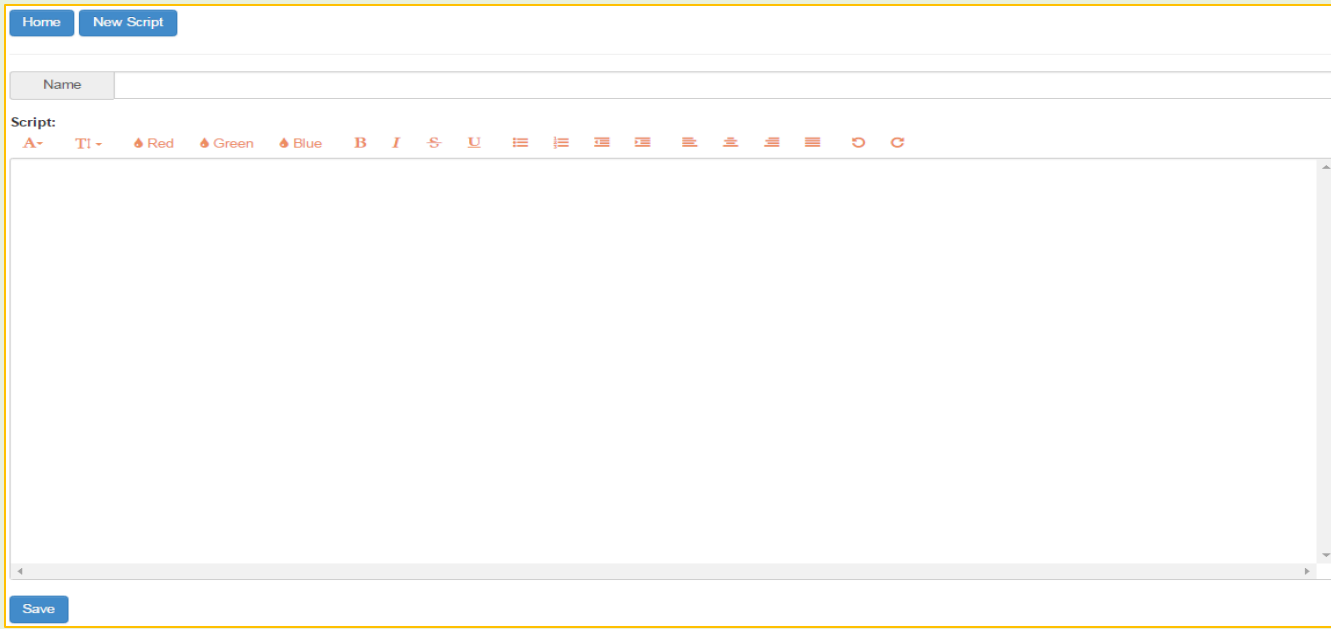
Tip(s):

All Notes, Contacts (added by you or a user within your agency), Flag options, Searches, Bookmarks and Call Scripts **have their own page**

- From here you can view them as a list
- Also you can **delete** from these pages

Call Scripts

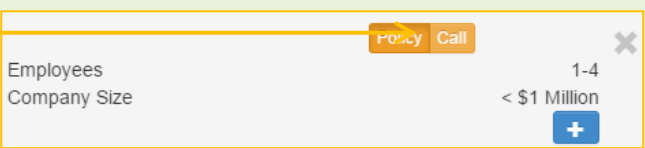
Access Call Scripts in the Navigation Bar under the **Saved** tab to access/create a script



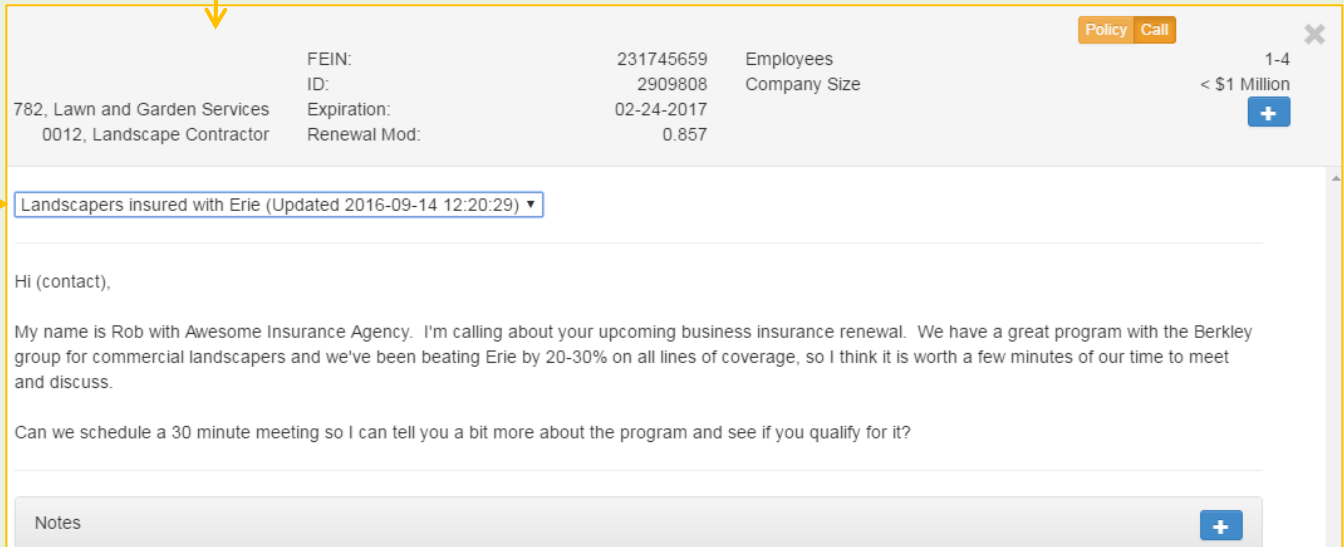
Name your Script; this is how you will identify for use

This is where the magic happens
- Write your pitch word for word or make an outline using the basic formatting options available

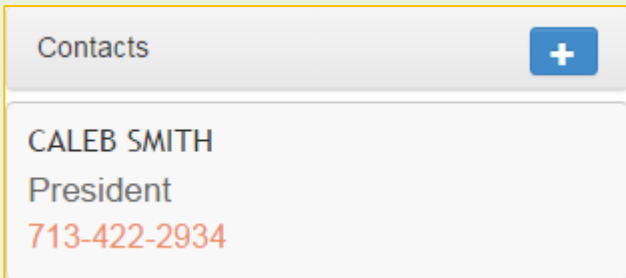
Call Scripts are available under the 'Call' toggle while viewing a business in the Modal window for fast access.



Click on the Call toggle to load a Call Script
Contact info will remain available on the left side of the Modal, where it normally displays
You can switch back to the policy view by clicking on the Policy toggle



Auto-Dial & Click-to-Call Telephone Links



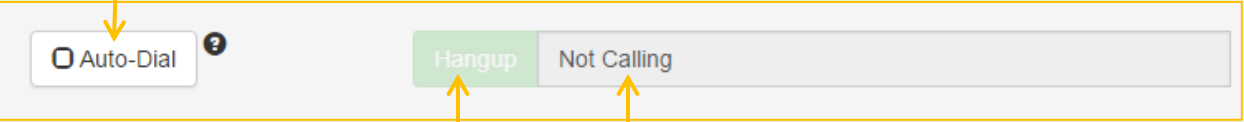
Contact portion of Modal

If your agency uses a VOIP service you can simply **click the phone # to call**

If the Telephone link is not working it is a problem on your end. We do not offer any help for setting up the feature. If you require assistance your IT dept should be able to help...good luck with that.

With Auto-Dial enabled the site will **automatically bring the next prospect in view and dial the #**
Click button to turn on/off

Bottom portion of Modal



Hang Up button

Call Status

If your work station is set up with the required media (headset, software) but you do not have a VOIP service, **we have an integrated provider you may use.**

You will need to verify the phone # you wish to use and can then purchase minutes for calling. Further instructions can be found on in the **Subscriptions menu** of the website where this can be set up and purchased.

Note that that phone # must be a direct dial # - the verification is automated and cannot dial an extension.

Mobile Site

ADVANCED OPTICAL SYSTEMS INC
5050 POWDER MILL RD
BELTSVILLE, MD 20705
SIC: 1731, Electrical Work
Employees: 1-4
Company Size: < \$1 Million

ID: zdu4mja3gz
Expiration: 01-03-2016
Renewal Mod: 0

JOHN NARRON, PRESIDENT
President
301-595-1933

Current Term

Class: 1731

Tip(s):

You can use Insurance Xdate from any smart phone using the Safari or Chrome web browser app just as you would on a desktop.

If you have trouble navigating the site on mobile, it is probably because you have fat fingers and there is nothing we can do about that. Sorry sausage fingers!

1-50 Of 1229 Results

Name: ADVANCED OPTICAL SYSTEMS INC
Cablingsystemsinc.net

Address: 5050 POWDER MILL RD
BELTSVILLE, MD 20705

Class: 1731
Electrical Work

Xdate: 01-03-2016

Name: AMPCO SIGN & ELECTRIC CO INC
ampcoelectric.com

Address: 5350 WENDY RD
SYKESVILLE, MD 21784

Class: 1731

ADVANCED OPTICAL SYSTEMS INC
5050 POWDER MILL RD
BELTSVILLE, MD 20705
SIC: 1731, Electrical Work
Employees: 1-4
Company Size: < \$1 Million

ID: zdu4mja3gz
Expiration: 01-03-2016
Renewal Mod: 0

JOHN NARRON, PRESIDENT
President
301-595-1933

Current Term

Class: 1731
Desc: Electrical Work

Carrier History

Modal view in portrait and landscape

List view in portrait and landscape

Navigation Menu

INSURANCE XDATE

1-50 Of 1229 Results

Name: ADVANCED OPTICAL SYSTEMS INC
Cablingsystemsinc.net

Address: 5050 POWDER MILL RD
BELTSVILLE, MD 20705

Class: 1731
Electrical Work

Xdate: 01-03-2016

Just the Tip(s):

Searching:

- Use **Mod Range** to eliminate Merit accts
- 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
- **Company Name searches** can be tricky. To improve results we added a list of possible matches that automatically populates based on what you type into the search field.

List Results/Sorting:

- When sorting a list with Exp Dates that cross into a new year the Xdates do not display linearly. Example:
 - o 11/15/16 to 2/15/17 will sort list starting with 1/1 up to 2/15 and then 11/15 to 12/31

Flags & Dashboard:

- From the **Dashboard** you can filter your Latest Flags as an effective way to **blow** through your Follow Up list, among other benefits. Click on a flag filter to pull up that list and start calling!



Exporting/Printing Lists:

- These buttons (Export, Call Sheets & Bookmark) are available at the bottom of any page in your search results.
- If you have monthly billing there is a 90 day restriction to exporting. So if you do a Name search and try to export that business you will receive an error. **Adding the Xdate to the search criteria will allow for exporting.**

Dedicated Pages:

- All Notes, Contacts (added by you or a user within your agency), Flag options, Searches, Bookmarks and Call Scripts **have their own page**
 - o From here you can view them as a list
 - o Also you can **delete** from these pages

Mobile Access:

- You can use Insurance Xdate from any smart phone using the Safari or Chrome web browser app **just as you would on a desktop.**
- If you have trouble navigating the site on mobile, it is probably because you have **fat fingers** and there is nothing we can do about that. Sorry sausage fingers!

Integrated VOIP Service:

- Phone # verification requires a direct dialed #. It is automated and cannot ask your receptionist to be put through.
- We provide no support for setting up this feature.

Saving & Sorting a Search:

- Sort your search **BEFORE** saving as this is what it defaults to for future use (e.g. by Exp Date)
- When you open a Saved Search the **search criteria repopulates the fields**. So if you have a really good search set up but need to modify it you can run it, edit the criteria, run it again, and save it as a new search instead of reinventing the wheel.