

WITH AMANDA RICHARDS  
MONDAY NOVEMBER 2, 2020

# Daily Bite Size Training

Topic:  
Segmentation List

## Save List as Report from the following modules:

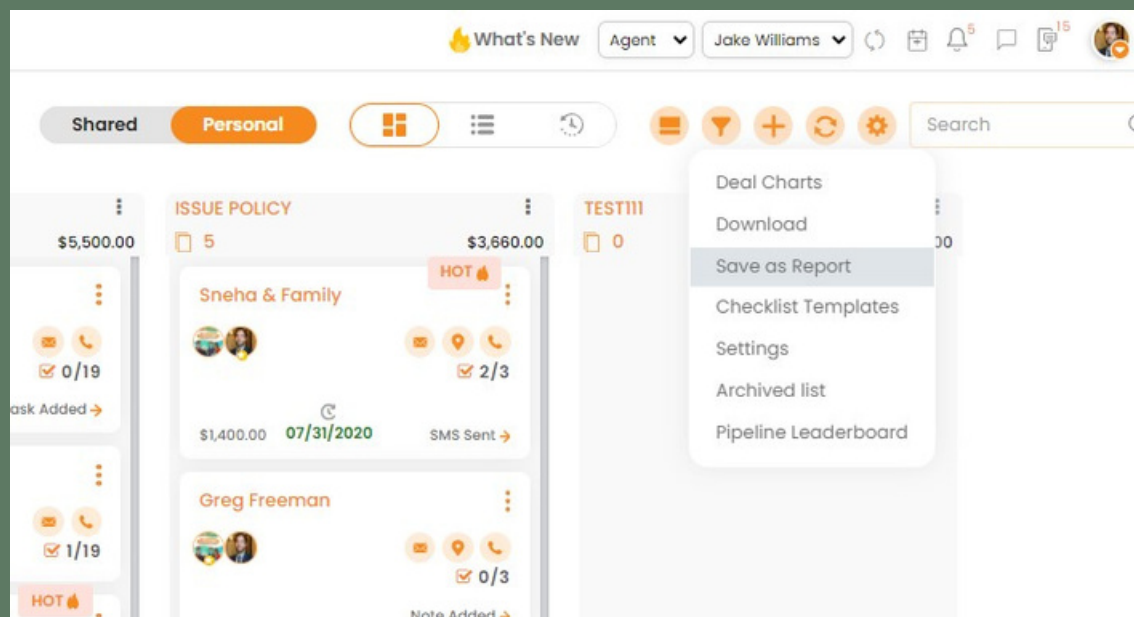
1. Pipeline manager
2. Opportunities
3. Policies
4. Accounts

# Segmentation List

## Why does this matter?

- Target a specific audience
- Add filters to selective list
- Use these lists for campaigns

# List in Pipeline Manager



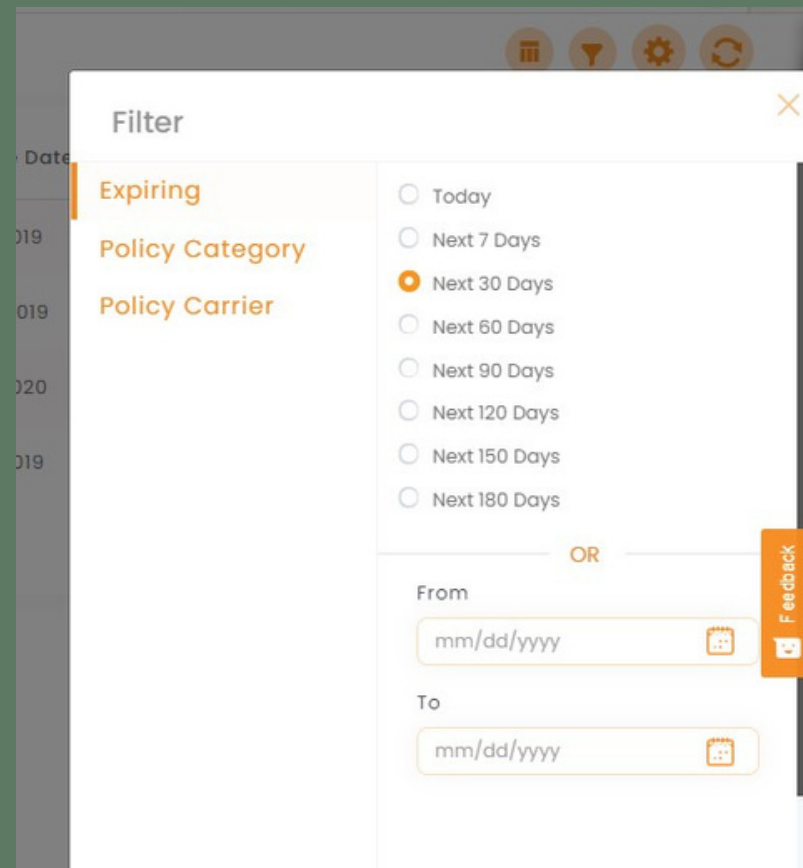
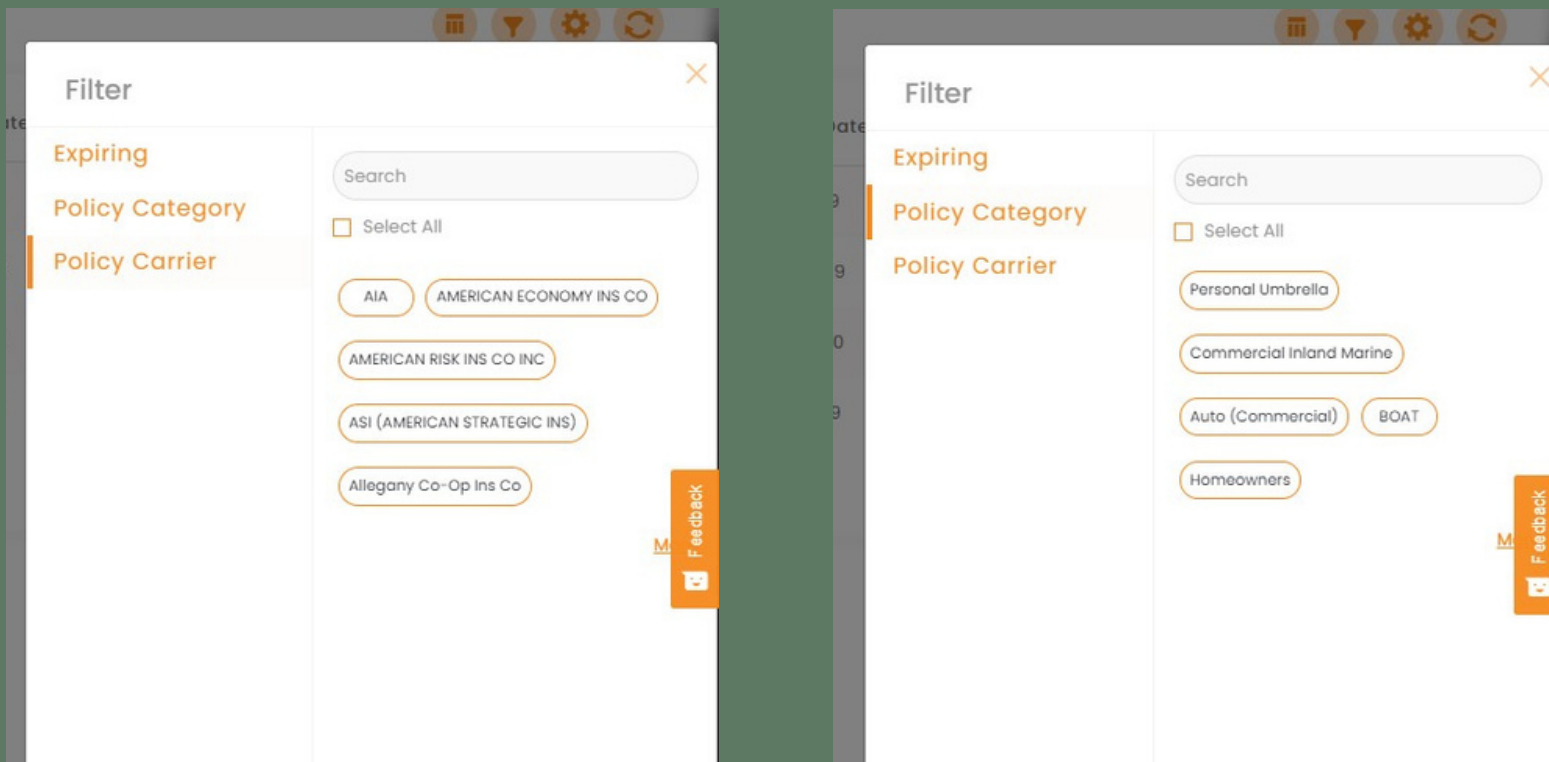
To Save the list in Pipeline Manager module follow the steps mentioned below:

*You must be logged in as Agent*

1. Navigate to Pipeline Manager
2. Click the Filter icon to apply filters for
  - a. Status
  - b. Assignee
  - c. Label
  - d. Deal Healthy
  - e. Due date
  - f. Created date
3. After your required list appears, click on the gear icon and select Save As Report
4. On the Save List screen, enter the List Name and click Save

# List in Opportunities

1. Navigate to Opportunities Module and select the relevant segment from Renewals, X-dates, Cross Sell and Win back.
2. Apply filters to obtain the required data list.
3. Click on the gear icon and select Save As List as shown above.
4. On the Save List screen, enter a list name and click Save.



Opportunities > Renewals

Next 30 Days Renewals : 592 Policies

	Contact Name	LOB	Policy Number	Carrier Name	Effective Date	Expiration Date	
1	Mohammad Sullivan	Business Owners	RNVKWPDKKZM5	Utica National Insurance Group	Sep 16, 2019	Sep 16, 2020	<div style="border: 1px solid red; padding: 2px;">Download Save as Report Save as List</div>

# HOW TO USE?

Go to the Policies module by clicking on Active Policies in the left navigation panel.

Apply filters for Category and Carriers as required

Click the gear icon for settings and select Save as Report

On the Save List screen enter the list title and click Save.

Policies

Policies : 29 Premium : \$25,385.12 + Add Policy

Active X dates

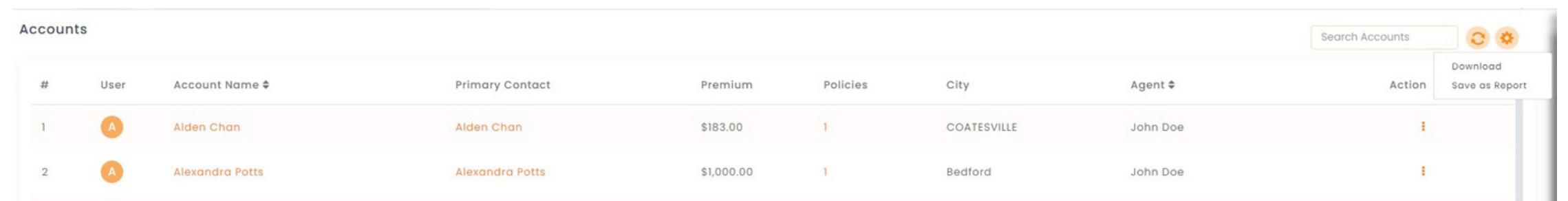
#	Policy No. ⌵	Account Name	Contact Name	Category	Carrier	Premium ⌵	Effective Date ⌵	Expiration Date ⌵
1	100	Test 1 Account	Test 1	Auto (Commercial)	American Risk Ins Co Inc	\$100.00	04/24/2020	04/24/2021
2	111AAA2w232	Douglas Gomez	Douglas Gomez	Homeowners	Aia	\$1,200.00	01/01/2020	01/01/2021
3	111AAAABNG	Jenifer Mclaughlin	Jenifer Mclaughlin	Homeowners	Allied	\$2,000.00	04/22/2020	04/22/2021
4	2232ssddsd	Alexandra Potts	Alexandra Potts	Homeowners	Aia	\$1,000.00	01/03/2020	01/03/2021

Download Save as Report

# LISTS IN POLICIES

# Lists in Accounts

1. Go to the Accounts module by clicking on Active Accounts in the left navigation panel.
2. Click the gear icon for settings and select Save as Report.
3. On the Save List screen enter the list title and click Save.



The screenshot shows the 'Accounts' module interface. At the top right, there is a search bar labeled 'Search Accounts' and two icons: a refresh icon and a gear icon. Below the search bar is a table with the following columns: '#', 'User', 'Account Name', 'Primary Contact', 'Premium', 'Policies', 'City', 'Agent', and 'Action'. The table contains two rows of data. The first row shows account #1 for user Alden Chan, with a primary contact of Alden Chan, a premium of \$183.00, 1 policy, located in Coatesville, and agent John Doe. The second row shows account #2 for user Alexandra Potts, with a primary contact of Alexandra Potts, a premium of \$1,000.00, 1 policy, located in Bedford, and agent John Doe. To the right of the table, there is a 'Download' button and a 'Save as Report' button.

#	User	Account Name	Primary Contact	Premium	Policies	City	Agent	Action
1	A	Alden Chan	Alden Chan	\$183.00	1	COATESVILLE	John Doe	⋮
2	A	Alexandra Potts	Alexandra Potts	\$1,000.00	1	Bedford	John Doe	⋮

# THANK YOU!

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Say or type your  
question when  
are ready.