



Renewal Intelligence

A guide to your monthly list

Every month you receive a list for your territory and line of business: every employer whose workers' comp term ends in the next 90 days, ranked by priority. Your own accounts are removed before you see it and watched in Book Watch instead.

The list is a working tool, not a spreadsheet. Open an account to see why it is there and what changed this term, mark what you did, leave a note for your team, and set a follow-up. Your marks carry forward from month to month.

This guide walks the page top to bottom in the same order as the walkthrough video. Each page shows a numbered view of the screen with notes underneath. The last page is a quick reference you can keep by the phone.

Signing in

Open the link from your email and sign in with your work email address. An 8-digit code arrives by email; there is no password. Anyone at your agency can be added, and you all share one pipeline of marks and notes.

The monthly rhythm

- 1st of the month: a new list is ready. You get an email with the link.
- Next 30 days: quote now. These accounts leave the list on the next send.
- 31 to 90 days: open the conversation; quote about 60 days ahead.
- Marks and notes stay with the account across sends.

1 · Your list



← Home

Sunshine State Insurance Group
Refreshed Oct 1 · next update Nov 1

Search business, principal,

1

Show hidden

2

Sample territory. Every business on this page is fictional; the layout, data layers and how are real. Marks and notes you make here stay in your browser.

Broward construction — accounts renewing in the next 90 days

Every construction-trades employer in Broward County with a workers' comp term ending in the next 90 days, ranked by priority. Your own accounts are already removed and watched in Book Watch. Scores rank accounts within a territory; they are not a percentage. Every business on this page is fictional.

3

20 renewing in 90 days 5 within 30 days 5 new this month 4 lapsed or stop-work 4 flagged 0 called 0 quoted 0 won 0 lost 0 skipped Export notes

4

Renewing in the next 30 days 5

5 to work select all Start calling

Quote now. These leave the list next send.

☐	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6–10 employees	Oct 14, 2026 comp renews	(954) 555-0120	▼
☐	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6–10 employees	Oct 7, 2026 comp renews	(954) 555-0119	▼
☐	Pelican Painting Contractors LLC Lauderhill	34 score	Coastal Bay Insurance Group FCCI	51–75 employees	Oct 12, 2026 comp renews	(954) 555-0114	▼
☐	Cypress Creek HVAC LLC Coconut Creek	23 score	Harbor & Main Insurance Amerisure	31–40 employees	Oct 21, 2026 comp renews	(954) 555-0111	▼
☐	Hallandale Elevator Service LLC Hallandale Beach	17 score	Riverbend Risk Partners Travelers	11–20 employees	Oct 22, 2026 comp renews	(954) 555-0129	▼

Renewing 31 to 90 days out 15

15 to work select all Start calling

- 1

Your agency and the issue date. A new list arrives on the 1st of every month.
- 2

One territory, one line of business. Every employer whose comp term ends in the next 90 days, ranked by priority.
- 3

At a glance: how many are renewing, how many are new this month, and what needs a second look.
- 4

Your pipeline. These counts update as you mark accounts.

2 · How the list is organised

20 renewing in 90 days
5 within 30 days
5 new this month
4 lapsed or
1 work
4 flagged
0 called
0 quoted
0 won
0 lost
0 skipped
[Export notes](#)

Renewing in the next 30 days 5

5 to work

☐ select all

Start calling

Quote now. These leave the list next send.

☐	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6–10 employees	Oct 14, 2026 comp renewals	(954) 555-0120	▼
☐	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6–10 employees	Oct 7, 2026 comp renewals	(954) 555-0119	▼
☐	Pelican Painting Contractors LLC Lauderhill	34 score	Coastal Bay Insurance Group FCCI	51–75 employees	Oct 12, 2026 comp renewals	(954) 555-0114	▼
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☐	Hallandale Elevator Service LLC Hallandale Beach	17 score	Riverbend Risk Partners Travelers	11–20 employees	Oct 22, 2026 comp renewals	(954) 555-0129	▼

Renewing 31 to 90 days out 15

15 to work

☐ select all

Start calling

Open the conversation this month; quote 60 days ahead.

☐	Parkland Landscape Construction LLC Parkland	41 score	Everbright Agency AmTrust	21–30 employees	Nov 7, 2026 comp renewals	(954) 555-0127	▼
☐	Everlast Drywall Construction Inc Pompano Beach	41 score	Coastal Bay Insurance Group FCCI	2–5 employees	Nov 30, 2026 comp renewals	(954) 555-0100	▼
☐	Coral Ridge Electric Co New Oakland Park	35 score	Seagrass Insurance Services Frank Winston Crum	11–20 employees	Dec 21, 2026 comp renewals	(954) 555-0103	▼
☐	Riverland Tile & Stone Inc Davie	33 score	Everbright Agency AmTrust	51–75 employees	Nov 25, 2026 comp renewals	(954) 555-0113	▼

1 Renewing in the next 30 days: quote now. These leave your list on the next send.

2 31 to 90 days out: open the conversation this month, quote about 60 days ahead.

3 · Reading a row

20 renewing in 90 days 5 within 30 days 5 new this month 4 lapsed or stop-work 4 flagged 0 called 0 quoted 0 won 0 lost 0 skipped Export notes						
Renewing in the next 30 days 5 5 to work ☐ select all Start calling						
Quote now. These leave the next send.						
☐	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6–10 employees	Oct 14, 2026 comp renews	(954) 555-0120
☐	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6–10 employees	Oct 7, 2026 comp renews	(954) 555-0119
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Renewing 31 to 90 days out 15 15 to work ☐ select all Start calling						
Open the conversation this month; quote 60 days ahead.						
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☐	Everlast Drywall Construction Inc Pompano Beach	41 score	Coastal Bay Insurance Group FCCI	2–5 employees	Nov 30, 2026 comp renews	(954) 555-0100
☐	Coral Ridge Electric Co New	35 score	Seagrass Insurance Services	11–20	Dec 21, 2026	(954) 555-0103

- 1 Business name, city and flags. Stop-work, Lapsed and New this month show up here.
- 2 Priority score: a ranking within your territory, not a percentage. Higher means more reasons to call.
- 3 Incumbent agency and carrier: who holds the account today.
- 4 Size band. The source is in the account panel.
- 5 Comp renewal date: the reason this account is on your list.
- 6 Best phone on file. Tap to call from a mobile.
- 7 Open the account for the full picture.

4 · Inside an account (1 of 2)

Quote now. These leave the list next send.

New River Excavation LLC

Plantation

41

score

Gulfstream Agency Inc

Hartford

6–10

employee

Oct 14, 2026

comp renews

(954) 555-0120

Why call

- Changed agents 4 times since 2021 (peer median 1) — ask what the last agent got wrong
- 14 permits in the last year, peer median 2 — ask whether the crew has grown with the work
- 3 lost-time claims in five years — ask how the mod moved at last renewal
- Incorporated 15 years ago, licensed in this trade for 9 — ask what else the entity

What's changed this term

Sep 4	Permit — commercial build-out, \$410k Broward County building permits
Jul 10	Notice of commencement recorded Broward County official records
Jun 24	Moved to Gulfstream Agency Inc from Palm Harbor Agency DWC proof of coverage
Mar 5	Stop-work order issued, lifted 9 days later DWC compliance
Oct 31, 2025	Lost-time claim reported DWC first reports of injury

Contact

Call (954) 555-0120

DWC policy · Apr 18 · matches website

Call (954) 555-0121

DBPR licence · May 29, 2025

Score, explained

Changed agency 4 times since 2021 +12

Permits, last 12 months · 14 +9

Lost-time claims, 5 years · 3 +4

Smaller signals +1

Score · higher than 88% of accounts in Broward 41

Includes +15 for signals with nothing on file (permit value, fleet, DBPR), scored at the territory median.

Size & shape

6–10 employees (business tax receipt)

Comp premium under \$5k

Governing class 5190 Electrical wiring

3 locations on the policy

tangible property \$212k

vs. Broward excavators of this size

switches	permits	tenure
4 ▲	14/yr ▲	9 yrs ▲
median 1	median 2/yr	median 3 yrs

Licence & registration

Licence DEM01260965 · Active

Business tax receipt Expired Sep 30

Sunbiz Inactive — administrative dissolution

- Why call: facts from public records, each paired with a question to ask.
- What changed this term: agency moves, permits, claims, stop-work orders. Every line names its source.

- Score, explained: every point behind the number, and where it sits among accounts in your territory.

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4 · Inside an account (2 of 2)

What's changed this term

- Sep 4: Permit — commercial build-out, \$410k Broward County building permits
- Jul 10: Notice of commencement recorded Broward County official records
- Jun 24: Moved to Gulfstream Agency Inc from Palm Harbor Agency DWC proof of coverage
- Mar 5: Stop-work order issued, lifted 9 days later DWC compliance
- Oct 31, 2025: Lost-time claim reported DWC first reports of injury

Contact

Call (954) 555-0120
DWC policy · Apr 18 · matches website

Call (954) 555-0121
DBPR licence · May 29, 2025

new@example.com

Address 273 SW 21st Ter, Plantation
Mailing PO Box 54232, Plantation
Ask for Ana Beltrán (qualifier)
[Find their website on Google](#)

Size & shape

6–10 employees (business tax receipt)
Comp premium under \$5k
Governing class 5190 Electrical wiring
3 locations on the policy
tangible property \$212k
vs. Broward excavators of this size

switches **4** ▲ median 1 yr
permits **14/yr** ▲ median 2/yr
tenure **9 yrs** ▲ median 3 yrs

Licence & registration

Licence DEMO1260965 · Active
Business tax receipt Expired Sep 30
Sunbiz Inactive — administrative dissolution
FEIN on file
Incorporated Jan 20, 2011 · Sunbiz
Licensed since Jun 28, 2017 · DBPR

Called C Quoted Q Won W Lost L Skip S My client

Already your client? Mark it and it moves to Book Watch next month.

Spoke with Ana. Renews Oct 14 — wants a quote by the 7th

Follow up

Miramar Masonry Corp 34 Northline Brokers 6–10 Oct 7, 2026 (954) 555-0120

4 Contact: phones and emails with their source and date, the qualifier to ask for, and the address.

5 Size and shape, then how this account compares with peers of the same trade and size.

6 Licence and registration status. Expired receipts and inactive Sunbiz filings are worth a question.

5 · Mark the outcome (1 of 2)

What's changed this term

Sep 4	Permit — commercial build-out, \$410k Broward County building permits
Jul 10	Notice of commencement recorded Broward County official records
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Oct 31, 2025	Lost-time claim reported DWC first reports of injury

Contact

Call (954) 555-0120
DWC policy · Apr 18 · matches website

Call (954) 555-0121
DBPR licence · May 29, 2025

new@example.com

Address 273 SW 21st Ter, Plantation
Mailing PO Box 54232, Plantation
Ask for Ana Beltrán (qualifier)

1 [their website on Google](#)

Size & shape

6–10 employees (business tax receipt)
Comp premium under \$5k
Governing class 5190 Electrical wiring
3 locations on the policy
tangible property \$212k
vs. Broward excavators of this size

switches 4 ▲ median 1	permits 14/yr ▲ median 2/yr	tenure 9 yrs ▲ median 3 yrs
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Licence & registration

Licence DEMO1260965 · Active
Business tax receipt Expired Sep 30
Sunbiz Inactive — administrative dissolution
FEIN on file
Incorporated Jan 20, 2011 · Sunbiz
Licensed since Jun 28, 2017 · DBPR

Called C

Quoted Q

Won W

Lost L

Skip S

2 My client

Clear

Already your client? Mark it and it moves to Book Watch next month.

3 Spoke with Ana. Renews Oct 14 — wants a quote

4 Follow up
2026-10-05

Miramar Masonry Corp

34 Northline Brokers

6–10

Oct 7, 2026

(954) 555-0120

- 1 Called, Quoted, Won, Lost, Skip. One click, or press C, Q, W, L or S while the account is open.
- 2 Already your client? Mark My client and it moves to Book Watch on the next send.

- 3 A note for your team: who you spoke to, quote details, next step. It saves as you type.
- 4 Set a follow-up date. It is kept with the note.

5 · Mark the outcome (2 of 2)

← Home

Sunshine State Insurance Group
Refreshed Oct 1 · next update Nov 1

Search business, principal, city

Show hidden

Sample territory. Every business on this page is fictional; the layout, data layers and workflow are real. Marks and notes you make here stay in your browser.

Broward construction — accounts renewing in the next 90 days

Every construction-trades employer in Broward County with a workers' comp term ending in the next 90 days, ranked by priority. Your own accounts are already removed and watched in Book Watch. Scores rank accounts within a territory; they are not a percentage. Every business on this page is fictional.

20 renewing in 90 days 5 within 30 days 5 new this month 4 lapsed or stop-work 4 flagged 1 called 0 quoted 0 won 0 lost 0 skipped [Export notes](#)

Renewing in the next 30 days 5

Quote now. These leave the list next send.

4 to work select all [Start calling](#)

New River Excavation LLC

Plantation Stop-work

41 score

Gulfstream Agency Inc
Hartford

6-10 employees

Oct 14, 2026
comp renews

(954) 555-0120

5

Called Oct 26

Why call

- Changed agents 4 times since 2021 (peer median 1) — ask what the last agent got wrong
- 14 permits in the last year, peer median 2 — ask whether the crew has grown with the work
- 3 lost-time claims in five years — ask how the mod moved at last renewal
- Incorporated 15 years ago, licensed in this trade for 9 — ask what else the entity does

What's changed this term

Sep 4

Permit — commercial build-out, \$410k Broward County building permits

Score, explained

Changed agency 4 times since 2021+12

Permits, last 12 months · 14+9

Lost-time claims, 5 years · 3+4

Smaller signals+1

Score · higher than 88% of accounts in Broward41

Includes +15 for signals with nothing on file (permit value, fleet, DBPR), scored at the territory median.

Size & shape

5 Your outcome and the date show on the row.

6 Counts roll up here. Export notes downloads every mark and note you have made.

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8

6 · Work a whole section

Renewing in the next 30 days 5

Quote now. These leave the list next send.

4 to work

select all

1 start calling

☐	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6–10 employees	Oct 14, 2026 comp renews	(954) 555-0120	Called Oct 26
☐	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6–10 employees	Oct 7, 2026 comp renews	(954) 555-0119	

Why call

- 14 permits in the last year, peer median 2 — ask whether the crew has grown with the work
- 2 lost-time claims in five years — ask how the mod moved at last renewal
name match — unverified
- Incorporated 9 years ago, licensed in this trade for 6 — ask what else the entity does

What's changed this term

Sep 11	● Permit — re-roof, 14 units	Broward County building permits
Aug 18	● Construction lien filed against — \$18,400	Broward County official records
Jul 2	● Lost-time claim reported name match — unverified	DWC first reports of injury
Jun 8	● Notice of commencement recorded	Broward County official records

Score, explained

Same agency 6 years -2

Permits, last 12 months · 14 +9

Lost-time claims, 5 years · 2 +3

Lien filed against +2

Score · higher than 75% of accounts in Broward **34**

Includes +22 for signals with nothing on file (permit value, fleet, DBPR), scored at the territory median.

Size & shape

6–10 employees (business tax receipt)

Comp premium \$25k–50k

Governing class 9015 Building operation

tangible property \$212k

1 of 25 · Renewing in the next 30 days · then 21 more in later sections

Walks every unworked account from this section onward · J / K next and previous · C Q W L S mark · N note · Esc exit

Exit

Previous

Next

1 Start calling opens the first unworked account in the section.

2 Then work it from the keyboard: J and K move next and previous, C Q W L S mark, N writes a note, Esc exits.

7 · Skipped accounts

← Home

Sunshine State Insurance Group
Refreshed Oct 1 · next update Nov 1

Search business, principal, city

☒ Show hidden

Sample territory. Every business on this page is fictional; the layout, data layers and workflow are real. Marks and notes you make here stay in your browser.

Broward construction — accounts renewing in the next 90 days

Every construction-trades employer in Broward County with a workers' comp term ending in the next 90 days, ranked by priority. Your own accounts are already removed and watched in Book Watch. Scores rank accounts within a territory; they are not a percentage. Every business on this page is fictional.

20 renewing in 90 days 5 within 30 days 5 new this month 4 lapsed or stop-work 4 flagged 1 called 0 quoted 0 won 0 lost 1 skipped [Export notes](#)

Renewing in the next 30 days 5

3 to work ☐ select all [Start calling](#)

Quote now. These leave the list next send.

☐	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6–10 employees	Oct 14, 2026 comp renews	(954) 555-0120	Called Oct 26
☐	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6–10 employees	Oct 7, 2026 comp renews	(954) 555-0119	Skip Oct 26

Why call

- 14 permits in the last year, peer median 2 — ask whether the crew has grown with the work
- 2 lost-time claims in five years — ask how the mod moved at last renewal
name match — unverified
- Incorporated 9 years ago, licensed in this trade for 6 — ask what else the entity does

What's changed this term

Score, explained

Same agency 6 years -2

Permits, last 12 months · 14 +9

Lost-time claims, 5 years · 2 +3

Lien filed against +2

Score · higher than 75% of accounts in Broward 34

Includes +22 for signals with nothing on file (permit value, fleet, DBPR), scored at the territory median.

- 1 Skip an account and it drops off the list; it still counts in your pipeline.
- 2 Show hidden brings skipped accounts back.
- 2 Open it and clear the mark to put it back on the list.

8 · Export a call list

Renewing in 30 days

within 30 days

new this month

lapsed or stop work

lagged

renewed

quoted

won

lost

skipped

Export notes

Renewing in the next 30 days 5

Quote now. These leave the list next send.

4 to work

select all

Start calling

☒	New River Excavation LLC Plantation Stop-work	41 score	Gulfstream Agency Inc Hartford	6-10 employees	Oct 14, 2026 comp renews	(954) 555-0120	Called Oct 26
☒	Miramar Masonry Corp Miramar	34 score	Northline Brokers Zenith	6-10 employees	Oct 7, 2026 comp renews	(954) 555-0119	
☒	Pelican Painting Contractors LLC Lauderhill	34 score	Coastal Bay Insurance Group FCCI	51-75 employees	Oct 12, 2026 comp renews	(954) 555-0114	
☒	Cypress Creek HVAC LLC Coconut Creek	23 score	Harbor & Main Insurance Amerisure	31-40 employees	Oct 21, 2026 comp renews	(954) 555-0111	
☒	Hallandale Elevator Service LLC Hallandale Beach	17 score	Riverbend Risk Partners Travelers	11-20 employees	Oct 22, 2026 comp renews	(954) 555-0129	

Renewing 31 to 90 days out 15

Open the conversation this month; quote 60 days ahead.

15 to work

select all

Start calling

☐	Parkland Landscape Construction LLC Parkland	41 score	Everbright Agency AmTrust	21-30 employees	Nov 7, 2026 comp renews	(954) 555-0127	
☐	Everlast Drywall Construction Inc Pompano Beach	41 score	Coastal Bay Insurance Group FCCI	2-5 employees	Nov 30, 2026 comp renews	(954) 555-0100	

5 selected

Export a call list with names, phones, licence numbers and renewal dates. Exporting doesn't change any outcome.

Clear

Copy for Excel

Download CSV

- 1 Select a whole section, or tick accounts one by one.
- 2 Copy for Excel or download a CSV: names, phones, licence numbers and renewal dates. Exporting never marks anything as called.



[← Home](#)

Sunshine State Insurance Group
Refreshed Oct 1 · next update Nov 1

roof

1

☐ Show hidden

Sample territory. Every business on this page is fictional; the layout, data layers and workflow are real. Marks and notes you make here stay in your browser.

Broward construction — accounts renewing in the next 90 days

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20 renewing in 90 days 5 within 30 days 5 new this month 4 lapsed or stop-work 4 flagged 1 called 0 quoted 0 won 0 lost 0 skipped [Export notes](#)

Renewing 31 to 90 days out 1

1 to work ☐ select all [Start calling](#)

Open the conversation this month; quote 60 days ahead.

☐

Blue Heron Roofing LLC

Fort Lauderdale

21

score

Riverbend Risk Partners

Travelers

~45 employees

Nov 2, 2026

comp renews

(954) 555-0101

▼

Worked — rotated out 1

1 to work ☐ select all [Start calling](#)

Accounts you marked in an earlier issue that have left the 90-day window. Your outcome and note are kept here until they bind or six months pass.

☐

Oakland Park Roofing Co

Oakland Park

Direct-written

FCCI

Sep 1, 2026

left the list

(954) 555-0134

▼

Sources: Florida Division of Workers' Compensation proof-of-coverage and compliance filings · Broward County building permits and official records · Sunbiz · county business tax receipts · OSHA 300A ·

1 Search by business, principal or city. The list filters as you type.

10 · The rest of the list

Coverage lapsed — nothing on the book after it 2						
Comp cancelled with no replacement filed. Often paperwork lag; sometimes distress. Verify before outreach.						
☐	Southport Marine Construction Inc Lapsed Fort Lauderdale	32 score	Seagrass Insurance Services Frank Winston Crum	6–10 employees	Jul 22, 2026 lapsed	(954) 555-0132
☐	Wilton Manors Solar LLC New Lapsed Wilton Manors	32 score	Palm Harbor Agency Builders Mutual	~45 employees	Aug 24, 2026 lapsed	(954) 555-0131
Stop-work order in the last 12 months 2						
Issued by DWC for operating without coverage. Ask whether it has been lifted and who wrote the replacement.						
☐	Griffin Road Demolition Inc Davie Stop-work	30 score	Coastal Bay Insurance Group FCCI	51–75 employees	Aug 17, 2026 order date	(954) 555-0128
☐	Broward Steel Erectors Inc Pembroke Pines Stop-work	8 score	Palm Harbor Agency Builders Mutual	31–40 employees	Mar 15, 2026 order date	(954) 555-0116
Worked — rotated out 2						
Accounts you marked in an earlier issue that have left the 90-day window. Your outcome and note are kept here until they bind or six months pass.						
☐	Oakland Park Roofing Co Oakland Park		Direct-written FCCI		Sep 1, 2026 left the list	(954) 555-0134
☐	Deerfield Fire Protection LLC Deerfield Beach		Northline Brokers Zenith		Oct 1, 2026 left the list	(954) 555-0133

1 Coverage lapsed: comp cancelled with nothing filed after it. Often paperwork lag, sometimes distress. Verify before outreach.

2 Stop-work orders in the last 12 months. Ask whether it has been lifted and who wrote the replacement.

3 Worked, rotated out: accounts you marked that have left the 90-day window. Your outcome and note stay until they bind or six months pass.

11 · Signing in

The screenshot displays the ClearPath Renewal Intelligence web application. At the top, there is a navigation bar with a 'Home' link and the text 'Sunshine State Insurance Group' and 'Refreshed Oct 1 · next update Nov 1'. Below this is a search bar labeled 'Search business, principal, city' and a 'Show hidden' checkbox. A sample territory notice states: 'Sample territory. Every business on this page is fictional; the layout, data layers and workflow are real. Marks and notes you make here stay in your browser.' The main content area is titled 'Broward construction' and includes a section for 'Renewing in the next 30 days' with a list of businesses. A modal window is overlaid on the page, titled 'Sign in to your agency' with the ClearPath INSIGHTS logo. The modal text reads: 'We emailed you an 8-digit code. It expires in 10 minutes.' Below this is a text input field containing 'ana@sunshinestateins.com' and a blue 'Send code' button. Two numbered callouts are present: '1' points to the email input field, and '2' points to the 'Send code' button.

1

2

1 Sign in with your work email. An 8-digit code arrives by email. There is no password.

2 Marks, notes and follow-ups are saved to your agency account, so your whole team works one pipeline.

Quick reference

Keyboard

J / K next and previous account
(in Start calling)

C Called

Q Quoted

W Won

L Lost

S Skip

N write a note

Esc exit Start calling

Marks

Called, Quoted, Won, Lost: your outcome, shown on the row with the date.

Skip: hides the account. Show hidden brings it back; Clear puts it back on the list.

My client: already yours. It moves to Book Watch on the next send.

Follow up: a date kept with your note.

Sections

Renewing in the next 30 days: quote now; these leave on the next send.

Renewing 31 to 90 days out: open the conversation, quote 60 days ahead.

Coverage lapsed: comp cancelled with nothing filed after it. Verify first.

Stop-work order in the last 12 months: ask if lifted and who wrote the replacement.

Worked, rotated out: accounts you marked that left the window. Notes kept until they bind or six months pass.

Exporting

Tick accounts or select a section, then Copy for Excel or Download CSV.

Exports carry names, phones, licence numbers and renewal dates.

Exporting never marks anything as called.

Export notes (top of page) downloads every mark and note you have made.

Every business in the sample list is fictional; the layout, data layers and workflow are what you receive. Questions? Reply to any ClearPath email.

