

STUDENT USER GUIDE

Getting started resources to assist in purchasing through to accessing your training

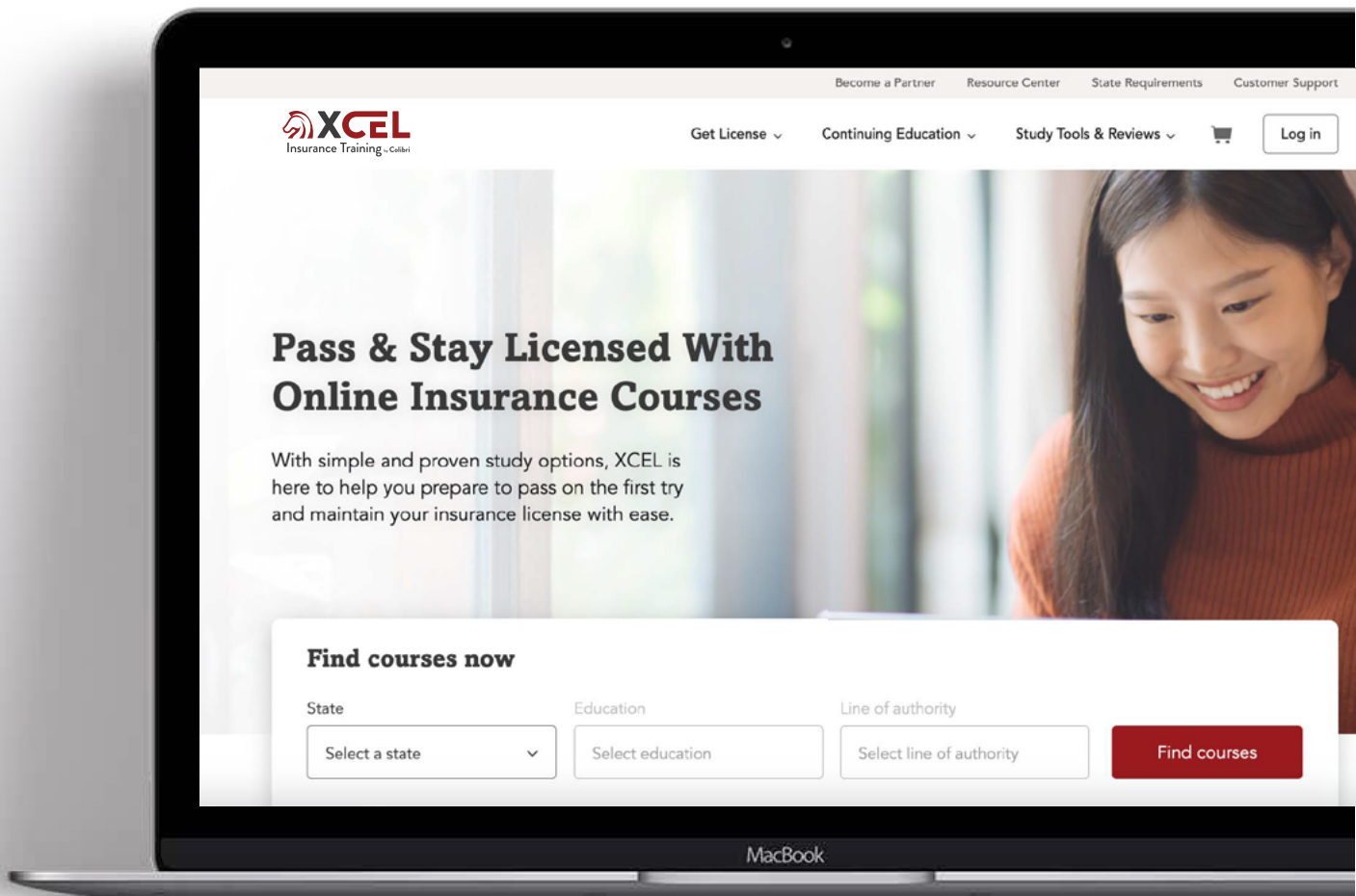
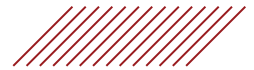


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INTRODUCTION



XCEL Solutions was founded on the principle of preparing students to pass standardized insurance exams online – on the first try. Since our beginning in 2012, we’ve helped millions of students learn exactly what they need to know to pass their state’s licensing exam for various insurance products. With XCEL you can easily find and purchase the training needed for your insurance licensing preparation.

This guide will walk you through the experience from purchasing to accessing your training.

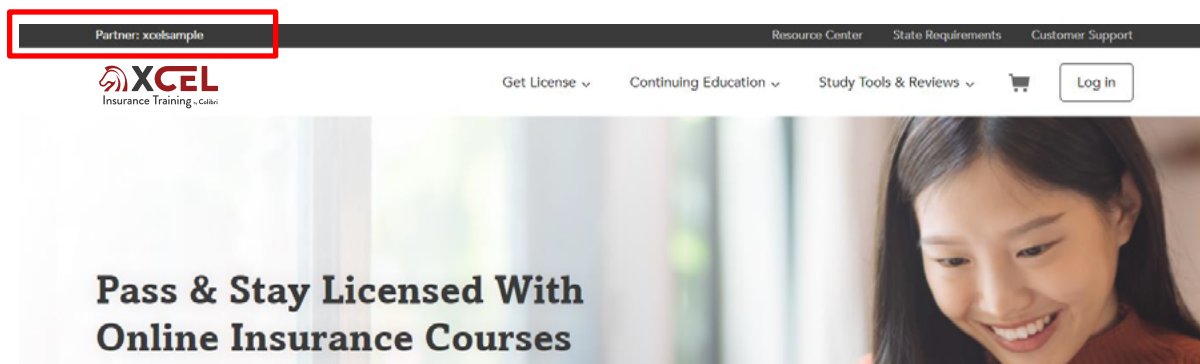
ACCESSING YOUR PARTNER SITE

XCEL provides each of our trusted Partners access to their own site (called Partner Sites) for a unique purchasing experience for their recruits. With Partner Sites, the process of viewing and purchasing courses has never been smoother, more transparent, or clearer, and managers will be able to easily track course progress through the Partner Code usage. Your Partner Site is your one-stop shop to access to your company’s exclusive pricing and products, and to log in to the Student Portal and Manager Portal.

IMPORTANT: Partner Codes were previously called Discount Codes. Users must use their Partner Site and/or Partner Code before adding products to the cart to ensure the correct products and pricing are reflected. Additionally, users must navigate to their Partner Site before attempting to log in.

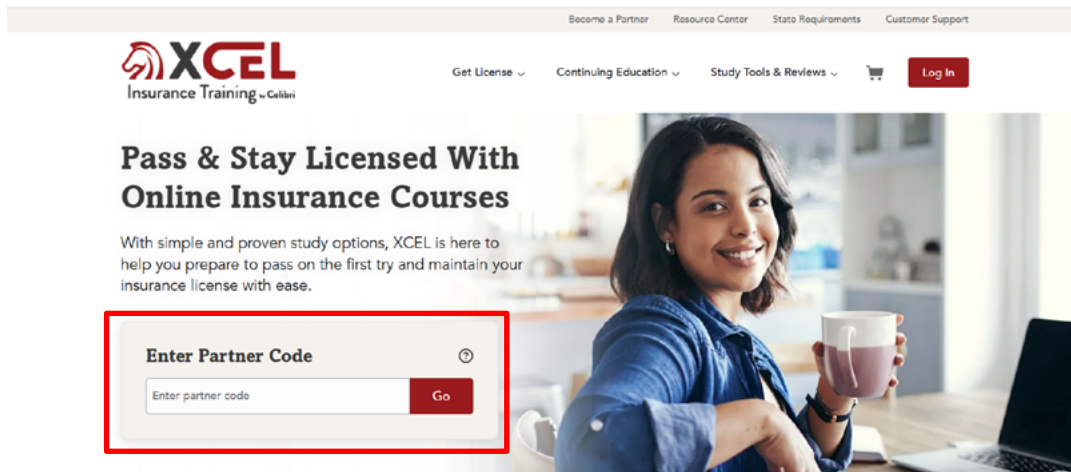
Accessing your Partner Site is easy! There are many ways to access your Partner Site:

1. Navigate to your Partner Site using your direct URL via your XCEL Enrollment Guide or other partner communications.
 - a. Your Partner Site URL will follow this format: `partners.xcelsolutions.com/{PartnerCode}`
 - b. You can identify if you have landed on your partner site, by confirming your Partner Code is in the top left corner in the grey bar. An example is below.

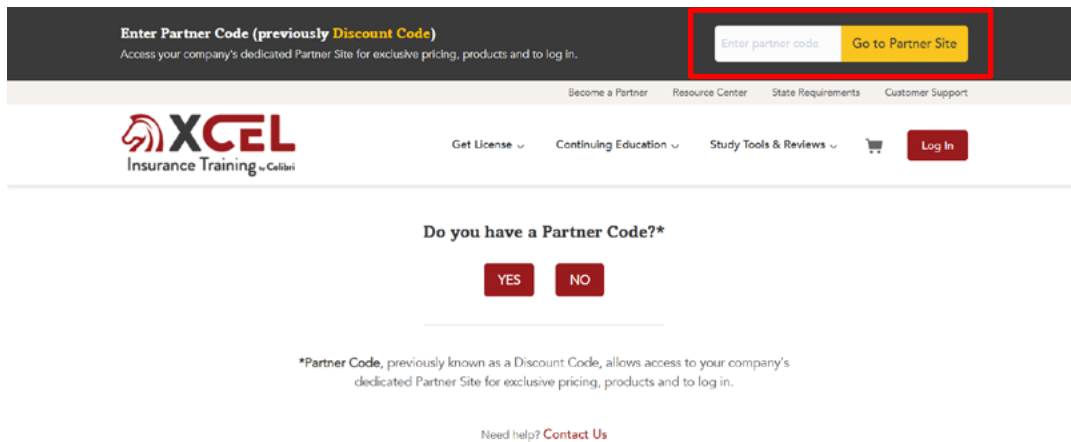


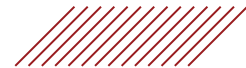


- When users navigate to xcel solutions.com, they may enter their Partner Code in the pop-up. An example is below.



- When on xcel solutions.com, enter your Partner Code at the top of the screen in the grey banner. An example is below.





PURCHASE EXPERIENCE

Finding Your Courses

XCEL makes it easy to find the courses you need for your insurance licensing preparation. From the homepage, use the **Find Courses Now** drop downs to select the desired **State**, **Education Type** and **Line of Authority**.

Find courses now

State

Select a state
▼

Education

Select education
▼

Line of authority

Select line of authority
▼

Find courses

From the result page, you can select from the recommended packages which offer the most value for your purchase or filter on or select from individual courses of interest in the results listing section.

California Life and Health Pre-licensing Premier

Our Premier package adds flashcards, a recorded review class, and our Prepared to Pass Promise to the standard package and is ideal for those looking to maximize their studying with various learning formats.

\$299.00

What's Included ▼

Add to cart

California Life and Health Pre-licensing

Our standard Life and Health Pre-licensing course includes XCEL's proven 3-part training system that has been carefully designed to cover every topic of the exam while preparing you to pass in as little as 2 weeks.

\$199.00

What's Included ▼

Add to cart

Filter

Format

Classroom

Online Instructor-Led

Online Self-Paced

Blended

Language

English

Spanish

Korean

Mandarin

Vietnamese

California Code and Ethics Pre-licensing

Life and Health

Online Self-Paced

12 Hours

English

\$199.00

Approved Course ID Update Course Number Required State Reporting Fee: \$6

Add to cart

California | Vida y Salud | Curso Educativo - Life and Health Pre-licensing

Life and Health

Online Self-Paced

52 Hours

Spanish

\$199.00

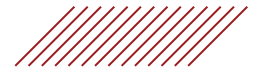
Approved Course ID 383034 Required State Reporting Fee: \$6

Add to cart

5

www.xcelsolutions.com

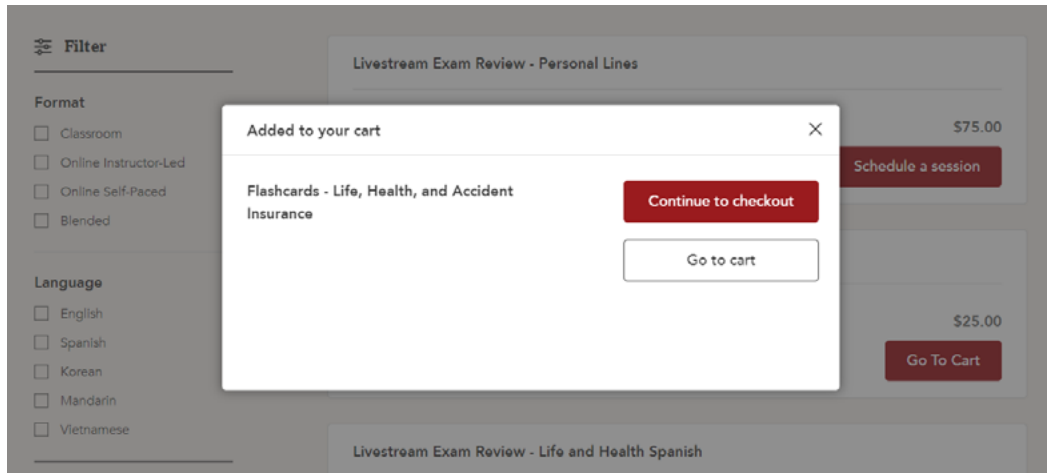
XCEL
Insurance Training by Colibri



Adding to Cart

Courses can be immediately added to your cart for purchase from any course card by clicking the **Add to cart** button. After adding a product to your cart you can **Continue to checkout** and complete your purchase or **Go to cart** to review your selections.

NOTE: If a course contains live classes, a *Schedule a session* button will be present where you can add the desired session dates to your course. After selecting your session you will be able to add the course to your cart and checkout.

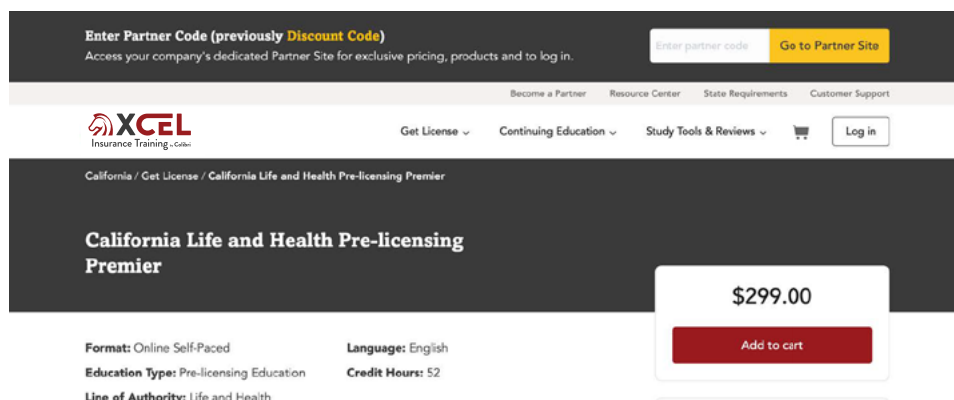


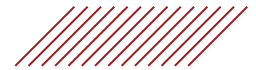
Reviewing Course Details

Complete course details can be reviewed by clicking into any course card. Product Detail Pages allow you to review information on the course including:

- Descriptions
- Formats
- Credit Hours
- State Requirements
- Any applicable State fees
- And more!

You can also **Add to cart** or **Schedule a session** from the **Product Detail Page**.

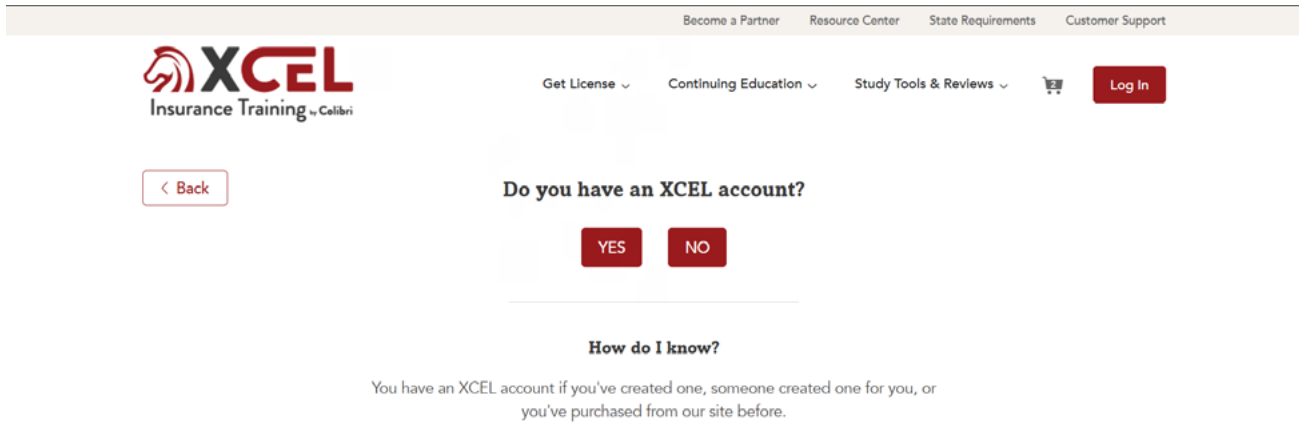




Signing up or Logging in

Before completing your purchase, you will need to either:

- Sign up by creating a new account once on your Partner Site (if applicable).
- Log in using an account you have created once on your Partner Site (if applicable).



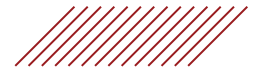
NOTE: While you are required to be logged in to complete your purchase, you can log in at any point in your purchase journey. XCEL recommends creating an account after entering your Partner Code or landing on your Partner Site to be sure your company's exclusive products and pricing are reflected. Additionally, you must be on your Partner Site before attempting to log in.

IMPORTANT: Students who enrolled in a course prior to July 25, 2024 must access their training using our legacy student dashboard. [Access your training](#)

Checking Out

Completing the checkout process is simple and payment options are flexible. If you are not already logged in, then you will first be prompted to Sign up or Log in.

IMPORTANT: Students who have created an account prior to July 25, 2024 will be required to create a new account. Managers who have created an account prior to July 25, 2024 may select *Forgot Password* to create a new password on their new Partner Site using their previous username.



Once logged in you will be able to checkout and will be prompted to complete the following sections:

Student Information – Select from the Myself or Someone else radio buttons and fill in the fields with the information for the individual who will be completing the course. Select Save & Continue to enable the Payment section.

IMPORTANT: When making a purchase for "Someone else" you will enter the information pertaining to that person (Name, Email etc.). Purchases can only be made for one student at a time.

Payment – XCEL offers two payment options for you to choose from: Credit Card and PayPal Express Checkout. Select a payment method and enter any updated billing information if needed.

Order Summary – Review the courses in your cart as well as your total. Promo Codes can be applied in this section. Complete your order by clicking Place your order or Continue to PayPal.

IMPORTANT: Promo Codes are limited time offers and are not the same as Partner Codes (previously called Discount Codes). If a Partner or Discount Code is entered in the Promo Code field, it will be invalid. Partner Codes should be entered before the checkout process upon landing on xcel solutions.com.

The screenshot shows the XCEL checkout process. At the top left is the XCEL logo (Insurance Training w/ Calibri). At the top center is 'SECURE CHECKOUT' with a lock icon. At the top right is a 'Return to cart' link.

1. Student information

I'm purchasing for:
 Myself Someone else

First name * Peter Last name * Parker
Street address *
(Optional) Apartment, Building, etc.
Country * United States State/Province * Select
City * Zip/Postal Code *
Phone number *
 Use this as billing address
Save & Continue

2. Payment

Credit Card PayPal Express Checkout

Card number * Security code *
Expiration date *
Month Year
 Save for later use
First name * Peter Last name * Parker
Street address *
(Optional) Apartment, Building, etc.
Country * United States State/Province * Select
City * Zip/Postal Code *
Phone number *
Save And Continue
Cancel

Order summary

California Life and Health Pre-licensing Premier	\$269.10
California Life and Health Pre-licensing	
Flashcards - Life, Health, and Accident Insurance	
Recorded Livestream Exam Review - Life and Health English	
State Reporting Fee	\$6.00
What is this fee?	
Promo code	Apply
Subtotal	\$275.10
Grand Total	\$275.10

Place your order

By completing your purchase, you agree to our [Terms of Service](#)



An **Order Confirmation** Page will display upon completion of your order. The purchaser will also receive an email from XCEL with the subject line: **Order Confirmation from XCEL Solutions. Please check your SPAM mail if you do not receive the email.** The student will receive an email notification from XCEL titled **Training and Login Details for <Student Name>** with more information on how to access the course.

NOTE: If you are purchasing for yourself, you will receive both the Order Confirmation and Training and Login Details emails.

Order History

When logged in, you can review your orders by hovering over the user avatar in the upper right corner and then selecting **Orders**. Here you will see summary information for each of your orders.

XCEL
Insurance Training w/ Colibri

Get License ▾ Continuing Education ▾ Study Tools & Reviews ▾ **My Training**

My Orders

Address Book
Payment Methods

Order #	Date	Order Total	Action
XLP0004413	3/6/24	\$275.10	View Order

1 Item Show 10 per page

More information for a specific order can be found by clicking on the associated **View Order** link.

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Insurance Training w/ Colibri

Get License ▾ Continuing Education ▾ Study Tools & Reviews ▾ **My Training**

My Orders

Address Book
Payment Methods

Order # XLP0004413

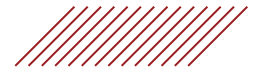
March 6, 2024

Items Ordered

Product Name	SKU	Price	Subtotal
California Life and Health Pre-licensing Premier	611CA040002P00	\$269.10	\$269.10
1 x California Life and Health Pre-licensing \$0.00	611CA040001A00		
1 x Flashcards - Life, Health, and Accident Insurance \$0.00	615US040007A00		
1 x Recorded Livestream Exam Review - Life and Health English \$0.00	615US040009A00		
State Reporting Fee	618US009000F00	\$6.00	\$6.00
		Subtotal	\$275.10
		Grand Total	\$275.10

Order Information

Billing Address	Customer Address	Payment Method
Caroline Cantorani 399 S Spring Ave Suite 108 St. Louis, Missouri, 63110 United States T: 000.000.1234	Caroline Cantorani 399 S Spring Ave Suite 108 St. Louis, Missouri, 63110 United States T: 000.000.1234	Credit Card Credit Card Type Visa Credit Card Number xxxx-1111

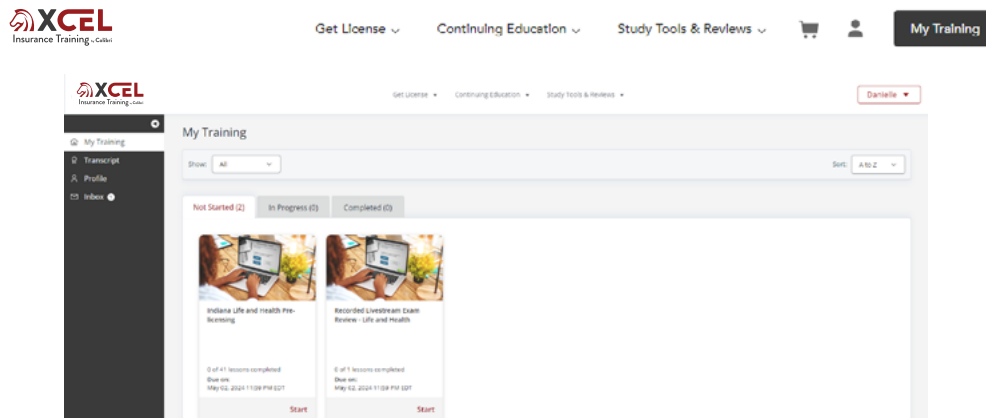


COURSE ACCESS AND EXTENSIONS

XCEL's learning management system (LMS) provides several benefits including access to: your course content, ability to purchase extensions, download and print completion certificates, and view your transcript for a historical record of your training completions.

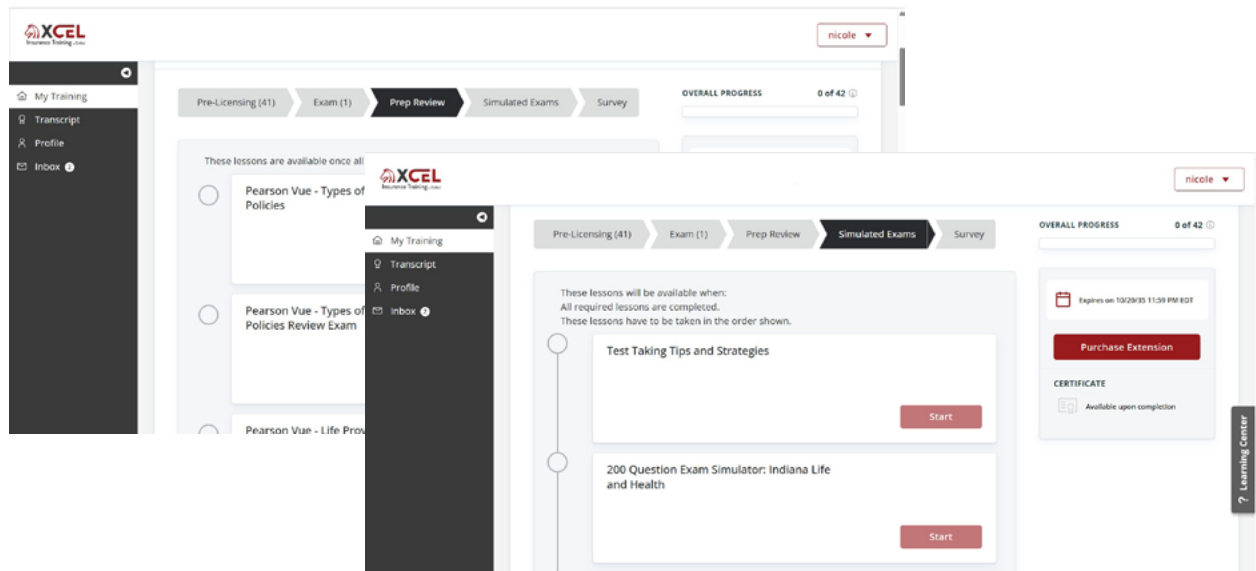
Accessing Courses

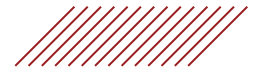
When logged into your XCEL Partner Site, click the **My Training** button in the top right of any page. You will then be taken into the **My Training Page** in the Student Portal where you can access your courses in the **My Training** Tab.



How to Access Your Prep Review and State Exam Simulator

Once you have passed your final exam, click on the **My Training Page** on your student dashboard. The third and fourth tabs unlock after you finish the exam on the second tab.

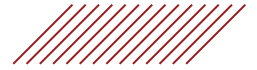




Purchasing Course Extensions

The purchase of additional course access can be initiated in LMS from either the Transcript tab or Training Details page of a course by clicking on the **Purchase Extension** button. After initiating the extension, you will be taken to checkout to complete the purchase. Click on **My Training** to access your course.

The screenshot displays the XCEL Insurance Training LMS interface. At the top left is the XCEL logo and 'Insurance Training .com'. The top navigation bar includes 'Get License', 'Continuing Education', and 'Study Tools & Reviews'. A user profile dropdown for 'Danielle' is in the top right. A left sidebar contains 'My Training', 'Transcript', 'Profile', and 'Inbox'. The main content area shows a course progress bar with 'Pre-Licensing (40)', 'Exam (1)', 'Prep Review', and 'Simulated Exams'. Below this, a list of lessons is shown with 'Start' buttons: 'Basic Principles of Life and Health Insurance', 'Chapter Exam: Basic Principles of Life and Health Insurance', and 'The Nature of Insurance'. On the right, an 'OVERALL PROGRESS' section shows '0 of 41' and a 'Purchase Extension' button. Below that, a 'CERTIFICATE' section indicates it is 'Available upon completion'.



STILL HAVE QUESTIONS?

Find answers to common questions on our Customer Support page. Or, contact our support team Monday through Friday 8:00am to 7:00pm by calling 866-559-9235 or emailing support@xcelsolutions.com.