

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, even Edge. Stop using Explorer! Edge replaced it.

Contact:

Office: 888-567-4119

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***email is best!**

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Click on a Title to jump to that section.

Search by keyword using the ctrl+f function.

Dashboard

Workers Comp

WC & Benefit Data toggle switch

Saved Searches

Filter:

Landscapers49 mins ago

100k + Harris Co4 hours ago

2 county renewals4 hours ago

butler c4 hours ago

Nassau1 day ago

3 county contractors2 days ago

30 mile Automotive Repair2 days ago

Cook Co Printers, Scrap3 days ago

cook co beauty salons4 days ago

Groups

Filter:

ABC Grp3

Auto Assn2

benefits3

Contractor4

cowest1

dead files2

Electrical Assn2

Erie10

Ins Mktng Pros3

Prospect Funnel

90 day

2256

Business Views

Latest Flags

Sub Activity

Filter:

Search

Reset

Location

Zipcode

State

Texas

County

All

Policy Info

Range

Effective Dates

MM-DD

To

MM-DD

Class Code

All

SIC Code

All

Carrier Group

Include

All

Current Carrier

All

Company

Name

Contains

Standard Premium

To

Employees

All

To

All

Company Size

All

To

All

Addl. Options

All

FR DIXIE ACQUISITION CORP

notes

03-01-2019

4 hours ago

contacted

JRN CARPENTRY INC

note

02-01-2020

5 hours ago

nextyear

DUNCAN INSURANCE AGENCY INC

01-08-2019

19 hours ago

written

FBA OF SYOSSET LLC

01-2019

1 day ago

written

GREAT QUOTES INSURANCE AGENCY INC

08-01-2018

2 days ago

followup

PHOENIX INSURANCE GROUP INC

left message, wants to touch base

01-01-2020

3 days ago

quoting

MORROW INSURANCE GROUP

05-26-2019

1 week ago

quoting

JOHN DEVAE & ROSS CAIN INS GOOSEHEAD

02-08-2019

1 week ago

written

CSI RISK MANAGEMENT LLC

12-03-2018

1 week ago

written

ALLEN TATE CO

01-01-2019

1 week ago

written

LEWIS & WALLACE ASSOCIATES INC

02-06-2019

2 weeks ago

appt

SYNERGY GROUP INSURANCE

12-09-2018

2 weeks ago

quoting

AHEDD

can we get rid of the canceled policy - granite state term was canceled 1/1...

01-01-2020

2 weeks ago

save

ACCELERATED FIRE SUPPRESSION SYSTEMS INC

03-01-2020

3 weeks ago

save

Calendar

today

January 2019

month

week

day

Sun

Mon

Tue

Wed

Thu

Fri

Sat

30

31

1

2

3

4

5

Quarterly Leader Board

#1 Rob Gifford

Premium:

5

9

6

\$ 66,750

Sub Activity

Displays your team's activity (flags) in Latest Flags window. Click on a business to view details, notes, etc. for Master Accts only

Search Criteria

for creating prospecting lists is available here.

Latest Flags

show your flagged prospects and can be filtered/sorted.

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)

Prospect Funnel

gives you a snap shot of your activity based on flagging companies

Calendar

Follow ups & appointments scheduled show up here

Quarterly Leader Board

shows the active pipeline of other Producers in the agency

Saved Searches

Latest Flags

Groups- see Bus. Details for more info

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

Calendar Follow ups & appointments scheduled show up here

Quarterly Leader Board shows the active pipeline of other Producers in the agency

Search Menu

Search

SearchReset

Location

Zipcode

State

Texas

County

All

Policy Info

Range

Effective Dates

MM-DD

To

MM-DD

Class Code

All

SIC Code

All

Carrier Group

Include

All

Current Carrier

All

Company

Name

Contains

Standard Premium

To

Employees

All

To

All

Company Size

All

To

All

Addl. Options

All

Location -

- Switch between County and Zip Code Radius using the toggle switch

Class/SIC -

- Switch between a Class Pick-List or Range using the toggle switch

Carrier Search Options -

- Carrier Group targets all carriers within the group
- Current Carrier lists each underwriting co

Name Search -

- Can be used as a keyword lookup (e.g. search 'church' and all businesses w/ church in the name result)

Size -

- EE & Gross Sales are available in all states.
- *Standard* WC premium is not available in all states

Include/Exclude -

- If you want to EXCLUDE prospects based on carrier click the Include/Exclude toggle
- You're welcome captive agents

Additional Options -

- Filters for contact info
- As available: Assigned Risk, PEO (very limited)

Notes -

- Toggling between zip code/county, and class pick-list/range resets the search menu. So, make these choices BEFORE entering your criteria.
- Using Class Code and SIC in the same search can be overly restrictive because the system is requiring both of those items be met, not one or the other. Same for Size criteria.

Saving Search -

- After you execute a search the results will load. There is a box below the Search menu where you can name and save the search for future use (retrieved on the dashboard). See next pg.

Search Results/List View

1-10 Of 985 Results

Record Count

1

2

3

>

>>

Name ▾	Address ▾	Class ▾	Exp. Date ▲	
A&B CRANE SERVICES LLC abcraneservices.com	13601 FM 529 RD HOUSTON, TX 77041	3724 MACHINERY OR EQUIPMENT ERECTION OR REPAIR NOC & DRIVERS	07-01-2019	<div><div></div><div>2 0</div></div>
ACCESSESP LLC www.accessesp.com	3656 WESTCHASE DR HOUSTON, TX 77042	6213 OIL OR GAS WELL: SPECIALTY TOOL OPERATION NOC-BY CONTRACTOR-ALL EMPLOYEES	07-01-2019	<div><div></div><div>2 0</div></div>
ACME BRASS & ALUMINUM MFG CO acmebrasshouston.com	5406 ELM ST HOUSTON, TX 77081	3066 SHEET METAL WORK-SHOP	07-01-2019	<div><div></div><div>2 0</div></div>
ACOUSTICAL SURFACES MANAGEMENT INC www.acousticgeo.com	PO BOX 7687 HOUSTON, TX 77270	5437 CARPENTRY-INSTALLATION OF CABINET WORK OR INTERIOR TRIM	07-01-2018	<div><div></div><div>1 0</div></div>
ADVANCED BUSINESS COPIERS LP www.advancedbusinesscopier.com	14925 STUEBNER AIRLINE R HOUSTON, TX 77069	5191 OFFICE MACHINE OR APPLIANCE INSTALLATION, INSPECTION, ADJUSTMENT OR REPAIR	07-01-2019	<div><div></div><div>1 0</div></div>
ADVANCED COMPRESSED AIR SOLUTIONS LL www.advancedcompressedair.com	9421 FM 2920 RD TOMBALL, TX 77375	3724 MACHINERY OR EQUIPMENT ERECTION OR REPAIR NOC & DRIVERS	07-01-2018	<div><div></div><div>2 0</div></div>
ADVANCED WEIGH TECHNOLOGIES INC www.awtscale.com	500 W DONOVAN ST HOUSTON, TX 77091	3724 MACHINERY OR EQUIPMENT ERECTION OR REPAIR NOC & DRIVERS	07-01-2019	<div><div></div><div>1 0</div></div>
AFTON PUMPS INC www.aftonpumps.com	PO BOX 9426 HOUSTON, TX 77261	3126 TOOL MFG-AGRICULTURAL, CONSTRUCTION, LOGGING, MINING, OIL OR ARTESIAN WELL	07-01-2019	<div><div></div><div>2 0</div></div>
AIR VALUE INC airvalueinc.com	PO BOX 596 LA PORTE, TX 77572	5183 PLU	07-01-2019	<div><div></div><div>2 0</div></div>
ALLOY & STAINLESS FASTENERS INC www.goasf.com	11625 CHARLES RD JERSEY VILLAGE, TX 77041	3132 NUT	07-01-2019	<div><div></div><div>2 0</div></div>

Export

Call Sheets ▾

Bookmark

1

2

List Scrolling

Sort by clicking on header row (ascending or descending)

Icons indicate available contact info and notes made by you or someone within the agency

Save Search – type a name to reference search. You can save xdates as searched or treat them as a Range (e.g. 60-90)

Click on a business to view details – see next page for more info

Excel CSV

PDF/ Print

Bookmark Saves the page you're on for later

Save Your Search

Name

July-Harris Co

Set dates as 07-01 to 07-31

Set dates as range for 171 to 201 days out.

Save

Business Details – Overview

EXCEL STAMPING & MANUFACTURINGINC
20101 SCHIEL RD
CYPRESS, TX 77433
SIC:
Class:

3466, Crowns and Closures
3146, HARDWARE MFG NOC

ID:
Expiration:

760043908
07-01-2019

Employees
Company Size
Standard Premium

20-49
\$1 - \$4.9 Million
\$65,482

Policy Carrier Class SIC PEO Call

WC Premium Enter WC Premium
Other Prem. Enter Other Premiums

Contacts

http://Excelstamping-Mfg.com

Frank Yaggi, Owner
Owner
281-304-0771

DEBRA YAGGI
Admin
2813044480

Current Term

Class Code	Description	Loss Cost	Rate
3146	HARDWARE MFG NOC	1.33	3.49125

Carrier History

Policy Term	Exp. Mod	Carrier	LCM
07-01-2018 - 07-01-2019	-	TRAVELERS CASUALTY AND SURETY	2.62500
07-01-2017 - 07-01-2018	-	TRAVELERS CASUALTY AND SURETY	2.48800
07-01-2016 - 07-01-2017	-	CHARTER OAK FIRE INS CO	2.25500
07-01-2015 - 07-01-2016	-	PHOENIX INS CO	2.02200
07-01-2014 - 07-01-2015	-	PHOENIX INS CO	-

More

Notes

Make a note...

Agent	Date	Note
None		

Auto-Dial

Hangup

Not Calling

Group

Flag

Print

Prev

Next

'Admin' contacts have been matched from 5500 datasets

Use to add your own contact info

Make notes here. Notes are date and agent stamped.

Print button

LCM filings are historical

Policy terms are color-coded to indicate change in Carrier Grp – note all carriers are part of Travelers

Scrolling buttons. USE THEM!

Business Details – Features

EXCEL STAMPING & MANUFACTURINGINC
20101 SCHIEL RD
CYPRESS, TX 77433
SIC:
Class:

3466, Crowns and Closures
3146, HARDWARE MFG NOC

ID:
Expiration:

760043908
07-01-2019

Employees
Company Size
Standard Premium

20-49
\$1 - \$4.9 Million
\$65,482

Policy Carrier Class SIC PEO Call

WC Premium Enter WC Premium

Other Prem. Enter Other Premiums

Contacts

http://Excelstamping-Mfg.com

Joseph Yaggi
CFO
281-304-0771

Frank Yaggi, Owner
Owner
281-304-0771

Current Term

Class Code	Description	Loss Cost	Rate
3146	HARDWARE MFG NOC	1.33	3.49125

Carrier History

Policy Term	Exp. Mod	Carrier	LCM
07-01-2018 - 07-01-2019	-	TRAVELERS CASUALTY AND SURETY	2.62500
07-01-2017 - 07-01-2018	-	TRAVELERS CASUALTY AND SURETY	2.48800
07-01-2016 - 07-01-2017	-	CHARTER OAK FIRE INS CO	2.25500
07-01-2015 - 07-01-2016	-	PHOENIX INS CO	2.02200
07-01-2014 - 07-01-2015	-	PHOENIX INS CO	-

Notes

Make a note...

Agent	Date	Note
None		

Auto-Dial

Hangup Not Calling

Group

Flags

Print

Prev

Next

Report Tabs

User Fields
-Works with
Flags, Dashboard
-When flagged as
'Written' these
premium fields
are added to
'Leader Board'
and AgencyDash

See CRM
Details – Notes
& Flags for
more info

- Save
- Contacted
- Follow Up
- Appointment
- Quoting
- Account Written
- Call Next Year
- Hide
- Remove Flag

Up Vote/ Down
Vote Xdate's
contact info for
future
reference

Phone #'s are
'click to call'
with a VOIP
phone
system
See next pg. for
more info

Auto-Dial
automates the
dialing process.
When enabled
the next
business is
dialed after
you hang up

Create Groups by clicking on the
Group button and typing in the
text field

Groups – Let
you segment
prospects
manually, into
a group, for
very specific
marketing lists

Flags - Stay on
track from
Contact to
Writing the
account. Links
with your
Dashboard and
AgencyDash

Business Details – Contact Info

CENTURY MECHANICAL CONTRACTORS INC

3008 WICHITA CT

FORT WORTH, TX 76140

SIC:

Class:

appt

FEIN:

751469157

Expiration:

09-30-2019

Employees

Company Size

Standard Premium

100-249

\$75 - \$199.9 Million

\$139,726

Policy

Carrier

Class

SIC

PEO

Call

✕

238220,

5183, PLUMBING NOC & DRIVERS

WC Premium

Enter WC Premium

Other Prem.

Enter Other Premiums

Contacts

+

http://Centurymech.com

Rod Campbell, Owner

Owner

817-293-3803

DIANE MILLS

Admin

9726416636

Current Term

Class Code

5183

Carrier History

Policy Term

09-30-2018 - 09-30-2019

Contacts

+

Name

Position

Phone

Email

+

Add Contacts - Click the blue '+' button to open contact fields.

An 'x' appears on contacts you add, instead of the up/down vote buttons. This will delete a contact, after confirmation.

LM INS CORP

1.23500

AMERISURE INS CO

1.85000

LM INS CORP

1.23500

Make a note...

Note

appt set for 1-25-2019 11:00 AM

spoke to Diane, said I have to meet w/ Rod, which she scheduled for Friday.

Auto-Dial

Hangup

Not Calling

Group

Flag

Print

Prev

Next

We update contact info annually for all businesses. Sometimes we get a wrong name or #. Sometimes we have two or more appropriate contacts (like an owner and treasurer). To keep track of the correct contact you can use the **Up-Vote** button to move the correct contact to the top. A **Down-Vote** will not delete the info, but will move it down the list.

Voting on contact info will not affect subsequent updates of the contact data. If a new piece of info is added it will appear below an Up-Voted contact and above a Dow-Voted piece of info. It does not reset, so you are not guessing next year.

Admin contacts are appended from 5500 datasets (Benefit plans). Admin contacts, plan administrators, are executives of the company. This data is **VERY** reliable. Note the # formatting sometimes does not have hyphens, CTC still works.



Click to Call means you can click on the # to dial out. You need a VOIP phone system (phone connected to your computer) for it to work. It otherwise requires no additional set up.

Class Reports – LCM Heat Map & Volatility Graph

EXTERIOR INC
673 PAN WILL RD
MINERAL BLUFF, GA 30559
SIC:
Class:

781, Landscape Counseling and Planning
0042, LANDSCAPE GARDENING & DRIVERS

FEIN:
ID:
Expiration:

453935564
0036135
01-01-2019

Employees
Company Size
Standard Premium

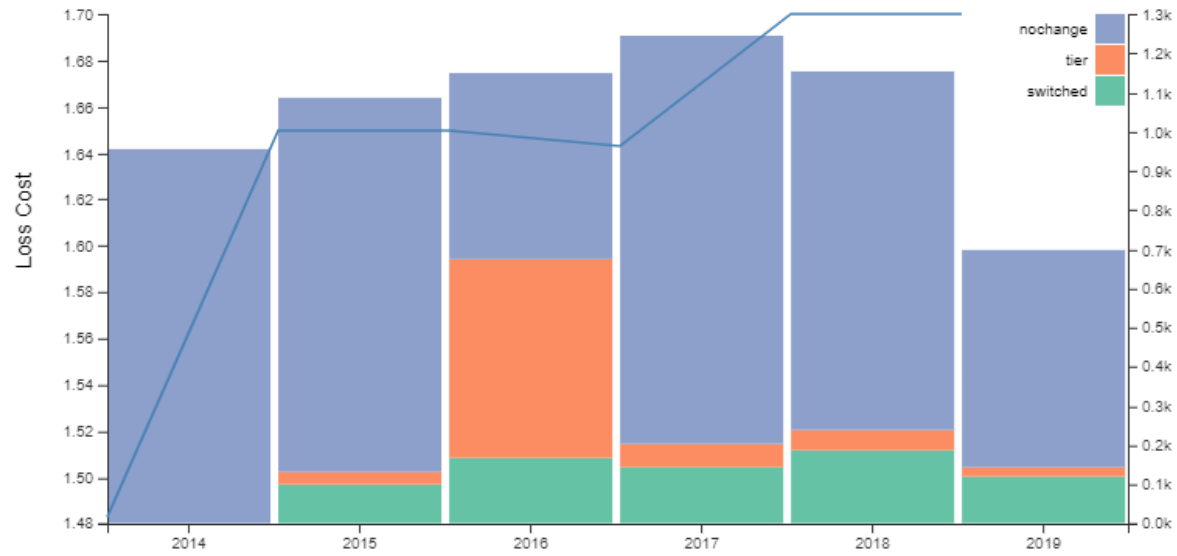
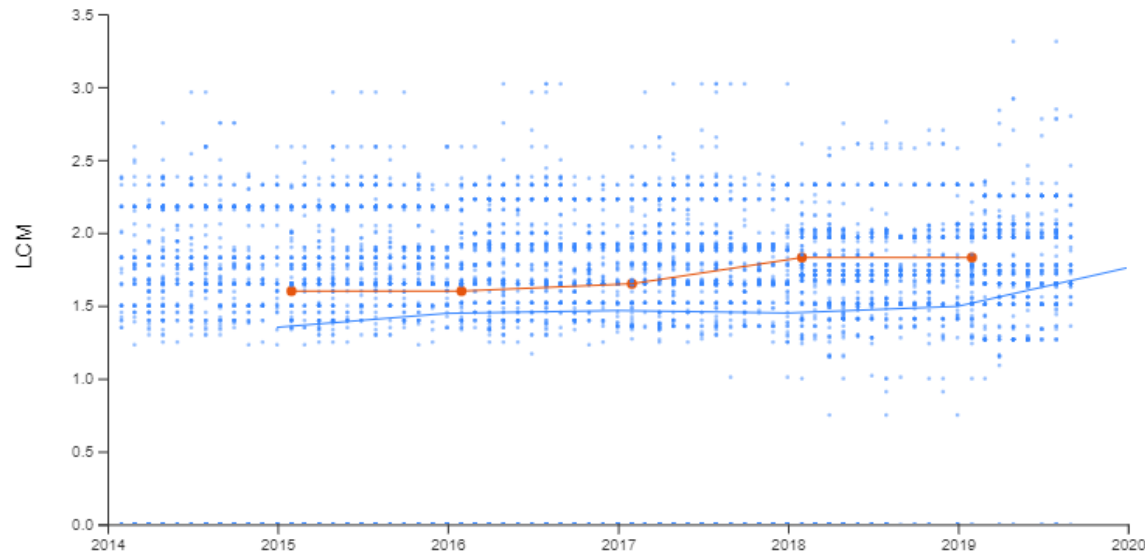
10-19
\$1 - \$4.9 Million
\$29,980

WC Premium
Other Prem.

Enter WC Premium
Enter Other Premiums

Class Code 0042 (Landscape Gardening & Drivers) Report for Georgia

This report is fully interactive, click on the bars in a graph to filter the other graphs by the clicked parameter. A preview of our Industry-wide and State-wide Visualization Package is available for agencies and carriers.



The **LCM Heat Map** shows all businesses in the prospect's class and plots the LCM filings used on their policy. The orange line is the prospect's LCM trend, the blue line is the industry average. The higher the line the higher the prospect's rate relative to peers.

A **Carrier Breakdown** report is further down the page

The **Market Volatility Graph** shows all businesses in the prospect's class and divides them into 3 segments – nonchanged (renewed); tier (change in u/w co) and switched (went to a new market). Inner-company and switching markets may represent changes occurring in the industry.

Class Report – Carrier Breakdown

EXTERIOR INC
673 PAN WILL RD
MINERAL BLUFF, GA 30559
SIC:
Class:

781, Landscape Counseling and Planning
0042, LANDSCAPE GARDENING & DRIVERS

FEIN:
ID:
Expiration:

453935564
0036135
01-01-2019

Employees
Company Size
Standard Premium

10-19
\$1 - \$4.9 Million
\$29,980

Policy

Carrier

Class

SIC

Call

WC Premium

Enter WC Premium

Other Prem.

Enter Other Premiums

Carrier Breakdown By Class

Carrier	This Year	Last Year	%±	Share
Amtrust Group	245	221	10.86%	21.43%
Auto-Owners Ins Co	109	122	-10.66%	9.54%
Berkshire Hathaway	84	118	-28.81%	7.35%
Markel Corp Group	75	45	66.67%	6.56%
Liberty Mutual Group	68	59	15.25%	5.95%
St Paul Travelers Group	68	73	-6.85%	5.95%
Blue Cross & Blue Shield of MI Group	44	20	120%	3.85%
BUILDERS INSURANCE A MUTUAL C	41	76	-46.05%	3.59%
Hartford Fire & Casualty Group	41	43	-4.65%	3.59%
American Financial Group	40	29	37.93%	3.5%

Showing 1 to 10 of 65 entries

Previous

1

2

3

4

5

6

7

Next

Carrier Breakdown lists all groups/carriers writing the class of business and are ordered by volume.

A snap-shot of the most recent 365 days of renewals vs. the preceding 365 days of renewals.

% Gain/Loss in Volume

Market Share for class

*in case you are wondering, this prospect’s carrier is in the back of the pack, with 2 accounts. Prospect might find this interesting.

CRM Details – Notes & Flags

Notes

Make a note...

Agent	Date	Note
Rob	01-12-2019	appt set for 1-16-2019 10:00 AM
Rob	01-12-2019	spoke to Jeremy. Appt set. no claims, premium has increased past 4yrs

alling

?

Group

Flag

Print

Prev

Next

Save

Contacted

Follow Up

Appointment

Quoting

Account Written

Call Next Year

Hide

Remove Flag

The **Notes** section displays all notes and flags logged by all users within the agency. This provides built in communication for active Producers (i.e. it prevents a co-worker from contacting your prospect).

When you Flag a company, it is logged in the notes to keep track of activity

Follow Up & Appointment flags can be scheduled to a calendar (located on Dashboard)

Download & Import scheduled events to Outlook using the arrow icon in upper right corner. Other calendar applications (google, etc) are being developed.

Calendar

<

>

today

January 2019












month

week

day

















Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
		10:02a G	10a EXT	10:05a P	10:05a M	
			10:02a M	10:06a L		
		10:06a S				
20	21	22	23	24	25	26
27	28	29	30	31	1	2

CRM Details – Groups

Groups		Filter: 
 Auto Assn	2	
 benefits	3	
 Contractors Assn	4	
 cowest	1	
 dead files	2	
 Electrical Assn	2	
 Erie	10	
 GCBA-GC's	13	
 Ins Mkting Pros	3	

Groups are set up within the business details view and are available for selection once created.

Groups can be retrieved as a list for export or printing from the Dashboard by clicking the group

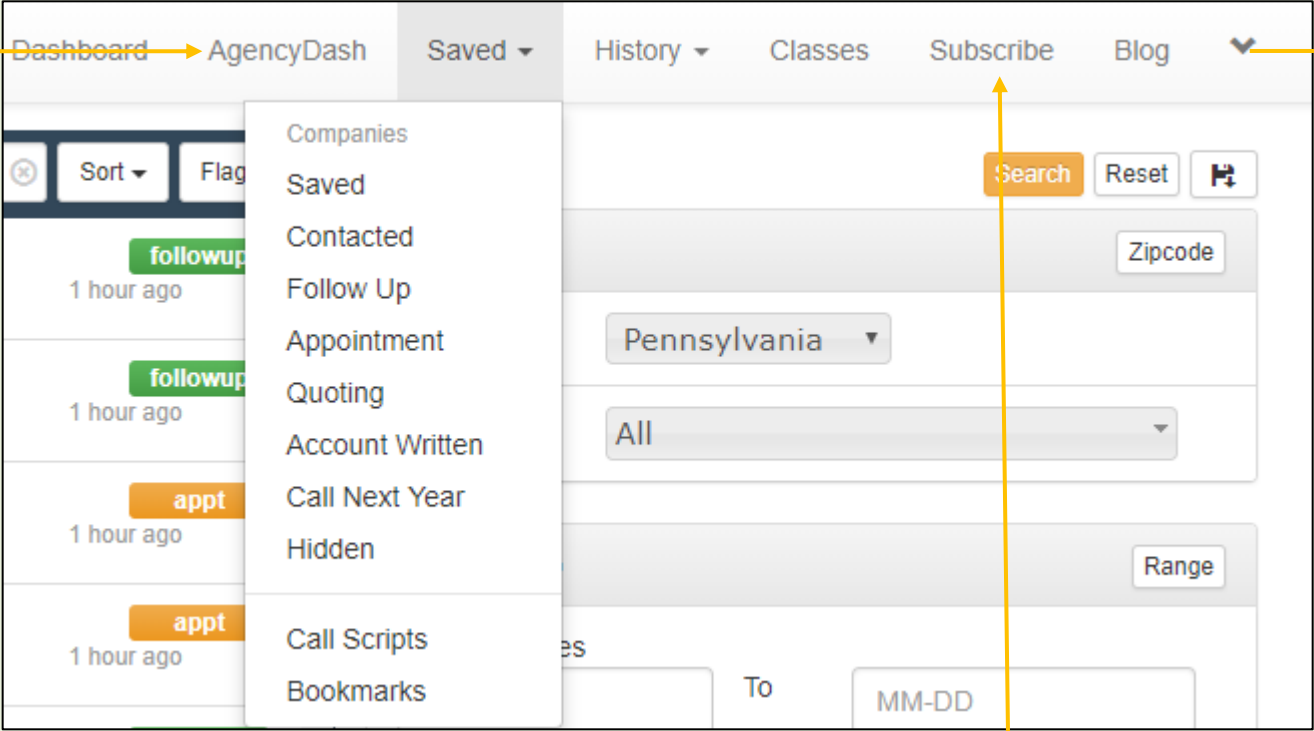
1-10 Of 13 Saved Companies						<div>12>></div>
Name ▾	Address ▾	Class ▾	MOD ▾	Exp. Date ▲		
G & D General Contracting www.ganddcontracting.com	315 N Scenic Str Allentown, Pa 18104	652 Carpentry- Residential Structures	-5 %	2019-01-01		<div>20</div> 
LOU KABELLO GENERAL CONTRACTOR	2004 11TH AVE ALTOONA, Pa 16601	652 Carpentry- Residential Structures	0.853	2020-01-01		<div>10</div> 
PREFERRED BUILDERS & GENERAL CONTRACTORS	251 LINDY ACRE RD ELYSBURG, Pa 17824	652 Carpentry- Residential Structures	0.864	2020-01-01		<div>10</div> 
SOLITRIN GENERAL CONTRACTING LLC	229 BARKER ROAD WYNCOTE, Pa 19095	652 Carpentry- Residential Structures	0.841	2020-01-01		<div>20</div> 
TIMS GENERAL CONTRACTING INC	4507 MARINA DR HOMESTEAD, PA 15120	652 Carpentry- Residential Structures	0.868	2020-01-01		<div>20</div> 
ROBS GENERAL CONTRACTING	722 BEAR VALLEY AVE SHAMOKIN, Pa 17872	651 Carpentry- Commercial Structures	0.861	2020-01-01		<div>10</div> 
A J GUZZI GENERAL CONTRACTORS INC	17 SKYLINE DR CLARKS SUMMIT, Pa 18411	645 Wallboard Installation	0.831	2020-01-01		<div>10</div> 
AZJ GENERAL INC CONTRACTORS	616 CAROLINE DRIVE NORRISTOWN, Pa 19401	652 Carpentry- Residential Structures	0.868	2020-01-01		<div>20</div> 

Groups allow you to manually add prospects to a defined list in a manner that is unavailable with traditional search criteria. For example, if you are part of a trade association and want to market to those members, it can be accomplished by assigning them to a Group.

Site Navigation Bar

AgencyDash is available for Master Acct holders and accessed here

Flagged companies can be accessed as a list from the Site Navigation bar - click on the Saved tab

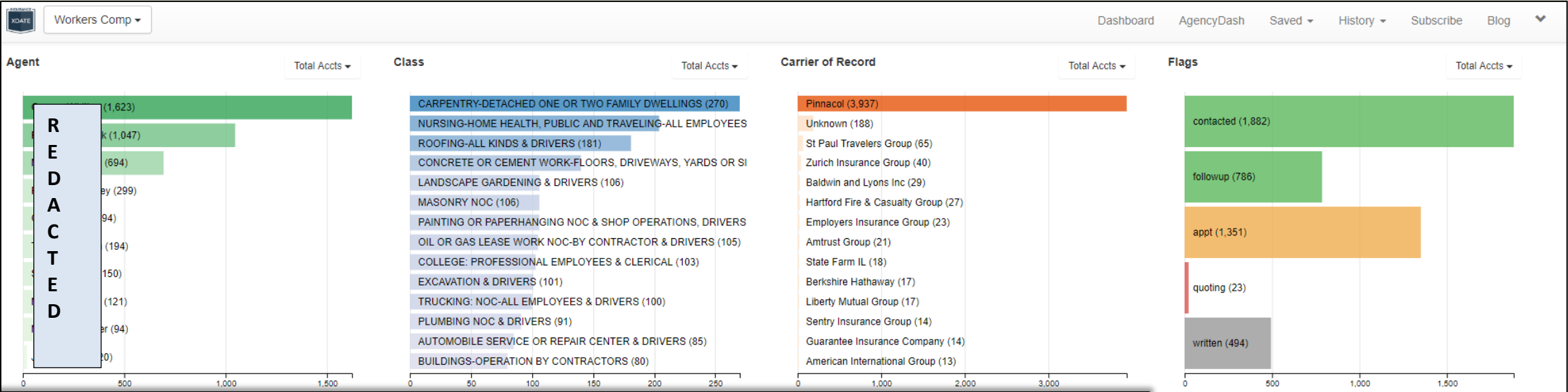


- Rob's Account
- Settings
 - Billing History
 - Logout
 - User Guide
 - Tutorial
 - FAQs
 - Contact Us

Access Settings, Billing History, etc using the drop-down arrow

Purchases made from the Subscribe page.

You can also view active subscriptions, update payment information, and purchase additional services.



WORKERS COMP

XDATE

Workers Comp ▾

Trial Expires in: 6002:37:32

Dashboard

AgencyDash

Saved ▾

History ▾

Classes

Subscribe

Blog

▾

Subscribe

State Selection

What Data is Available? → AL ▾

Master Account

Provides unlimited web access (including printing and basic exporting) to a single state's data set and includes 3 user licenses. Subscription is billed annually or monthly and automatically renews unless canceled. Monthly requires a 2 month cancellation period, which is included in the first installment. Note there is a 90 day limit to exporting with the monthly subscription. Please refer to our [Terms of Service](#) and [FAQ](#) for more information.

Subscribed

Additional Services

Agent Sub Account

Adds an additional user license to your account. Users can be added/deleted in the Settings menu. Discounted pricing available for three or more additional Agent Accounts.

\$75 / \$25

\$250

Setup / Monthly

Yearly

Additional States

Adds access to an additional state's data set. Select a state and click Purchase. States must be purchased one at a time.

\$75 / \$25

\$250

Setup / Monthly

Yearly

Carrier Search

Adds the current Carrier as searchable criteria for all states you are subscribed to.

\$75 / \$25

\$250

Setup / Monthly

Yearly

Export Package

Adds more data to the Excel CSV export. The Export Package includes 3 year term (billed annually). Refer to our [FAQ](#) for more information.

Contact Us

Data Analysis

We can spot trends and answer your most pressing questions.

Contact Us


Custom Data Requests

We provide carriers and agencies custom data for analysis. Some examples of the data we have available are historical, market share, trends, and won or lost business.

Contact Us

Your Payment Method

Update CC here

Visa  Update

Confirmation Code: (optional)

Submit

Your Service

Renews

Master Account PA

03-11-2099

Sub Account

02-06-2099

Sub Account

02-06-2099

Sub Account

05-07-2099

Premium Dataset export

10-27-2099

Premium Dataset vis

01-27-2019

Active Subscriptions and their renewal date are shown here

Settings

Account Settings

Email

giffrij@gmail.com

Update

Change Password

Update

Account Preferences

Show Agent Activity

☒

Save

Update email address and password here

Master Acct has option to view agent activity in Dashboard (check box)

Agent Accounts

Account Type:

Master

Available Agent Accounts:

3 Available

Your Agents

Name	Email	
bob gifford (Agent)	rob@insurancexdate.com	✕
Nathanael Weber (Agent)	nathanaelcw@gmail.com	✕

Add An Agent

First Name

First Name

Last Name

Last Name

Email

Email

Password

Password

Account Type

Agent

Add

Master Acct can add users with the provided fields.

Click on the orange ‘X’ next to a user to delete their account.

- Notes/contacts will be retained.

When adding users, your (you being the Master acct holder) email should NOT be in the email field. This is the email address of the user you are adding.

Tutorial Links, Self-Serve

Check out our Tutorial page at - <https://insurancexdate.com/tutorials.php> - for some helpful resources...like this user guide? Oh, and we have some videos. TONS of them, and I'm constantly cranking them out, too. Just like the blog posts, lol.

Seriously though, in a given year we shoot for 3-4 updates that will have a significant impact on your experience. What have we done this year; you say? Here goes...

2019 –
Revamped LCM and WC Premium for historical display (look for more developments on this)
Cross-referenced employee benefit data to append (match) contact info (all those Admin contacts)
Added Health & Retirement Tabs for quick access to this data from the details screen (for free)
Number four is in the works

Point is we do update this guide every 7-8 months and will be available on this page. More videos will follow thanks to the positive feedback 😊