

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.

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\*email is best!

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# Dashboard

WC & Benefit Data toggle switch

The dashboard interface includes several key sections:

- Saved Searches:** A list of search criteria such as 'Landscapers', '100k + Harris Co', and '2 county renewals' with their respective update times.
- Groups:** A list of business groups like 'ABC Grp', 'Auto Assn', and 'benefits' with counts.
- Prospect Funnel:** A funnel chart showing 2256 prospects.
- Calendar:** A monthly calendar for January 2019 showing appointments.
- Quarterly Leader Board:** A table showing top producers, with '#1 Rob Gifford' having a premium of \$56,750.
- Latest Flags:** A table of business flags with columns for company name, date, and flag type (e.g., 'contacted', 'nextyear', 'written').
- Search Criteria:** A detailed form for creating prospecting lists with fields for Location, State, County, Policy Info, Effective Dates, Class Code, SIC Code, Carrier Group, Current Carrier, Company Name, Standard Premium, Employees, Company Size, and Addl. Options.

Saved Searches

Latest Flags

Groups- see Bus. Details for more info

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

# Health - Search Menu

**State**  
Nevada

**County** Zipcode  
All

**Plan Features**  
All

**Industry**  
All

**Active Participants:**  
0 - ∞

**Contract Type**  
All

**Carrier**  
All

**Renewal Date**  
MM-DD - MM-DD

**Premium**  
0 - ∞

**Commission %**  
0 - 100

**Loss %:**  
0 - ∞

**Broker**  
Contains

**Plan Feature -**  
- Target by type(s) of plan- Health, Life, Disability, etc.

**Active Participants -**  
- Total within the org, not an individual coverage

**Carrier -**  
- Target by provider. (1/30/20-working to normalize names)

**Premium -**  
- Total premium for all contracts in a plan

**Loss Ratio -**  
- A calculated field available when plans are experience rated

**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.

Save Your Search

Name ⓘ

Save

**Location -**  
- Toggle County/Zip Code Radius using the toggle link

**Industry -**  
- 20 Industry Groups for targeting based on operations

**Contract Type -**  
- Redundant with Plan Features, will likely be removed

**Renewal Date -**  
- Target by contract renewal date

**Commission -**  
- Net commission for plan, inclusive of fees

**Broker -**  
- Target by Brokerage

Health Search Results/List View

Name ▼		Financials ▼	Commissions ▼	Renewal ▼	
ARARAT HOME OF LOS ANGELES, INC 15105 MISSION HILLS ROAD MISSION HILLS, CA 91345	EMPLOYEE BENEFITS PLAN	Premium: \$1,376,438 Liabilities: \$0 Net Assets: \$0	Commission: \$68,878 Comm % 5%	06-30-2019	⋮
BRAILLE INSTITUTE OF AMERICA, INC. 741 N VERMONT AVE LOS ANGELES, CA 90029	HEALTH AND WELFARE PLANS	Premium: \$2,250,117 Liabilities: \$0 Net Assets: \$0	Commission: \$113,203 Comm % 5.03%	06-30-2019	⋮
BRETHREN HILLCREST HOMES 2705 MOUNTAIN VIEW DRIVE LA VERNE, CA 91750	GROUP LIFE MEDICAL PLAN	Premium: \$1,664,078 Liabilities: \$0 Net Assets: \$0	Commission: \$63,503 Comm % 3.82%	06-30-2019	⋮
CENTINELA FEED AND PET SUPPLIES 2727 MARICOPA STREET TORRANCE, CA 90503	INC. WELFARE BENEFITS PLAN	Premium: \$732,005 Liabilities: \$0 Net Assets: \$0	Commission: \$50,612 Comm % 6.91%	06-30-2019	⋮
COMMUNITY HEALTH ALLIANCE OF PASADENA 455 W. MONTANA STREET PASADENA, CA 91103	WELFARE BENEFIT PLAN	Premium: \$1,160,184 Liabilities: \$0 Net Assets: \$0	Commission: \$77,084 Comm % 6.64%	06-30-2019	⋮
GOLDEN STAR TECHNOLOGY, INC. 12881 166TH STREET CERRITOS, CA 90703	HEALTH AND WELFARE PLAN	Premium: \$680,804 Liabilities: \$0 Net Assets: \$0	Commission: \$56,670 Comm % 8.32%	06-30-2019	⋮

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

List can be sorted by clicking on any of the header rows

Financial section includes total Premium paid

Commission section shows the net commission for the prospect’s plan

Export your list by clicking button at bottom of page

# Health Details – Overview

**BRILLE INSTITUTE HEALTH AND WELFARE PLANS**  
 BRILLE INSTITUTE OF AMERICA, INC.  
 741 N VERMONT AVE  
 LOS ANGELES, CA 90029  
 NAICS: 611000

EIN: 951641426  
 End Date: 06-30-2019

[Plan](#) [Call](#)

Contacts +

---

REZA RAHMAN  
Admin  
**(323) 663-1111**

Phone #'s are 'click to call' with a VOIP phone system

**Features**

- 4A - Health (other than vision or dental).
- 4B - Life insurance.
- 4D - Dental.
- 4E - Vision.
- 4H - Long-term disability.
- 4L - Death benefits (include travel accident but not life insurance).
- 4Q - Other.

**Participation**

	2019	2018	2017	2016	2015	2014	2013	2012	2011
Total Participants:	172	165	167	221	228	221	354	414	357
Active Part.:	170	159	166	214	224	217		358	352
Retired Part.:	2	6	1	7	4	4		56	5
Deceased Part.:	0	0	0	0	0	0		0	0

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

**Insurance Contracts**

CALIFORNIA PHYSICIAN'S SERVICE

Renewal: 2019-06-30    Retention:  
 Covered: 233    Claims:

Premium \$ 0  
 Non-exp Rated: \$ 2,018,817  
 Commission 5% \$ 100,941

Auto-Dial ⓘ

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

Use to add your own contact info

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

Print button

Scrolling buttons. USE THEM!

**Health Details – Features & Participation**

**Features** summarize the types of plans the Prospect has

Features	
4A - Health (other than vision or dental).	
4B - Life insurance.	
4D - Dental.	
4E - Vision.	
4H - Long-term disability.	
4L - Death benefits (include travel accident but not life insurance).	
4Q - Other.	

Participation									
	2019	2018	2017	2016	2015	2014	2013	2012	2011
Total Participants:	172	165	167	221	228	221	354	414	357
Active Part.:	170	159	166	214	224	217	341	358	352
Retired Part.:	2	6	1	7	4	4	13	56	5
Deceased Part.:	0	0	0	0	0	0	0	0	0

**Participation** this section breaks down participation – total, active, retired & deceased

# Health Details – Insurance Contracts

**Ins Contracts** breaks down the individual coverage making up the plan

Click 'Brokers' to display broker.

Insurance Contracts									
CALIFORNIA PHYSICIAN'S SERVICE									
Renewal:	2019-06-30	Retention:	\$	0	Premium	\$	0	Non-exp Rated:	\$ 2,018,817
Covered:	233	Claims:	\$	0	Commission	5%	\$	100,941	
1. Health		Loss Ratio:		NAN	Fees	0%	\$	0	
2. Prescription Drug									
<b>Brokers</b>									
UNITED AGENCIES, INC. 100 N 1ST ST BURBANK, CA 91502						Commission		\$100,941	
						Fees		\$0	
SUN LIFE ASSURANCE COMPANY OF CANADA									
Renewal:	2019-06-30	Retention:	\$	0	Premium	\$	0	Non-exp Rated:	\$ 130,540
Covered:	160	Claims:	\$	0	Commission	3.82%	\$	4,988	
1. Dental		Loss Ratio:		NAN	Fees	0%	\$	0	
<b>Brokers</b>									
VISION SERVICE PLAN									
Renewal:	2019-06-30	Retention:	\$	0	Premium	\$	0	Non-exp Rated:	\$ 38,383
Covered:	171	Claims:	\$	0	Commission	4.12%	\$	1,583	
1. Vision		Loss Ratio:		NAN	Fees	0%	\$	0	
<b>Brokers</b>									

Coverage Provider, type of coverage, & Covered EE's listed here.

Retention, Claims and Loss Ratio are populated for Experience Rated coverage.

This section breaks down premiums by non/exp rating, commissions and fees.



# Retirement - Search Menu

**State**

**County** Zipcode

**Plan Features**

**Industry**

**Active Participants:**  
 -

**Assets**  
 -

**Commission**  
 -

**Provider**

**Company Name** ?

**Location -**

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

**Plan Feature -**

- Target prospects based on plan features such as 401k, Profit-Sharing, ESOP, etc.

**Industry -**

- Prospects are grouped into 1 of 20 Primary Industry Groups for targeting based on operations

**Size -**

- Use any combination of Active Participants, Asset size, and Commissions to target based on size

**Provider -**

- Target prospects based on their current provider. This feature is still being developed but works appropriately.

**Name Search -**

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

**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.

# Retirement Search Results/List View

Record Count

List Scrolling

51-100 Of 1186 Results

Name ▲		Financials ▼	Commissions ▼	Renewal ▼	
ALLIANCE INSPECTION MANAGEMENT, LLC 330 GOLDEN SHORE SUITE 400 LONG BEACH, CA 90802	401(K) PLAN	Assets: \$12,507,424 Liabilities: \$0 Net Assets: \$12,507,424	Commission: \$36,748 Comm % 0.29%	12-31-2018	⋮
ALLIANT ASSET MANAGEMENT COMPANY, LLC 21600 OXNARD STREET SUITE 1200 WOODLAND HILLS, CA 91367	401(K) PROFIT SHARING PLAN	Assets: \$8,978,602 Liabilities: \$0 Net Assets: \$8,978,602	Commission: \$2,100 Comm % 0.02%	12-31-2018	⋮
ALLSTATE FLORAL, INC. 14038 PARK PL CERRITOS, CA 90703	INC. EMPLOYEES SAVINGS PLAN	Assets: \$6,684,438 Liabilities: \$0 Net Assets: \$6,684,438	Commission: \$1,678 Comm % 0.03%	12-31-2018	⋮
ALPERT & ALPERT IRON & METAL, INC. 1815 S. SOTO STREET LOS ANGELES, CA 90023	& PROFIT SHARING PLAN	Assets: \$15,601,270 Liabilities: \$41,187 Net Assets: \$15,601,270	Commission: \$103,671 Comm % 0.66%	12-31-2018	⋮
ALPINE ELECTRONICS OF AMERICA, INC. P.O. BOX 2859 TORRANCE, CA 90501	RETIREMENT SAVINGS PLAN	Assets: \$50,352,903 Liabilities: \$0 Net Assets: \$50,352,903	Commission: \$29,447 Comm % 0.06%	03-31-2018	⋮
AMADA MIYACHI AMERICA INC. 1820 S. MYRTLE AVENUE MONROVIA, CA 91017	401(K) PLAN & TRUST	Assets: \$29,346,626 Liabilities: \$0 Net Assets: \$29,346,626	Commission: \$11,457 Comm % 0.04%	12-31-2018	⋮
AMAG TECHNOLOGY, INC. 20701 MANHATTAN PLACE TORRANCE, CA 90501	TECHNOLOGY CASH SAVINGS PLAN	Assets: \$8,301,635 Liabilities: \$0 Net Assets: \$8,301,635	Commission: \$1,200 Comm % 0.01%	12-31-2018	⋮
AMAWATERWAYS, LLC 26010 MUREAU RD. CALABASAS, CA 91302		Assets: \$7,895,589 Liabilities: \$0 Net Assets: \$7,895,589	Commission: \$925 Comm % 0.01%	12-31-2018	⋮
AMERICA CHUNG NAM, LLC. 1163 FAIRWAY DRIVE CITY OF INDUSTRY, CA 91789	AND PROFIT SHARING PLAN	Assets: \$8,486,217 Liabilities: \$0 Net Assets: \$8,486,217	Commission: \$41,375 Comm % 0.49%	12-31-2018	⋮
AMERICAN BUSINESS BANK 523 WEST 6TH STREET SUITE 900 LOS ANGELES, CA 90014	401(K) PLAN	Assets: \$18,711,225 Liabilities: \$0 Net Assets: \$18,711,225	Commission: \$34,086 Comm % 0.18%	12-31-2018	⋮

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

State:

County:  Zipcode

Plan Features:

Industry:

Active Participants:  -

Assets:  -

Commission:  -

Provider:

Company Name <sup>?</sup>:

---

Name <sup>?</sup>

Export your list by clicking button at bottom of page

Financial section includes Net Assets and Liabilities

Commission Section. Does not include basis-points, see Provider details to view

Save Search – type a name to reference search, and click the 'Save' button.

# Retirement Details - Overview

AMERICAN GOLF 401(K) RETIREMENT SAVINGS PLAN  
 AMERICAN GOLF CORPORATION  
 909 N. SEPULVEDA BLVD SUITE 650  
 EL SEGUNDO, CA 90245  
 NAICS: 713900

EIN: 952875931  
 End Date: 12-31-2018

Plan Call

Contacts +

DENISE SCHLEGEL ✕  
 Admin  
 (310) 664-4085

Phone #'s are 'click to call' with a VOIP phone system

Related Plans  
 AD&D & HEALTH BENEFIT  
 401(K) RETIREMENT SAVINGS PLAN  
 401(K) RETIREMENT SAVINGS PLAN

Financials	2018	2017	2016	2015	2014	2013	2012	2011	2010
BOY Assets:	\$ 31,169,700	\$ 27,762,643	\$ 26,474,821	\$ 29,462,355	\$ 29,223,129	\$ 27,159,575	\$ 25,809,931	\$ 26,914,282	\$ 25,613,104
Liabilities:	\$ 61,029	\$ 25,611	\$ 28,482	\$ 29,211	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
EE Contrib:	\$ 1,513,941	\$ 1,403,354	\$ 1,245,261	\$ 1,204,482	\$ 1,278,373	\$ 1,354,540	\$ 1,250,305	\$ 1,287,723	\$ 1,395,053
Emp Contrib:	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Income/Loss:	(\$ 2,475,155)	\$ 3,197,525	\$ 1,337,142	(\$ 702,951)	(\$ 195,846)	\$ 3,073,650	\$ 1,467,234	(\$ 250,143)	\$ 2,136,385
Total Income:	\$ 313,280	\$ 5,539,114	\$ 3,218,474	\$ 817,536	\$ 2,671,817	\$ 5,409,020	\$ 3,396,858	\$ 1,400,678	\$ 3,969,617
Paid Benefits:	\$ 2,112,388	\$ 2,056,129	\$ 1,918,086	\$ 3,738,359	\$ 2,301,491	\$ 3,276,910	\$ 1,998,296	\$ 2,437,849	\$ 2,550,551
Expenses:	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commission:	\$ 71,332	\$ 50,317	\$ 12,566	\$ 66,711	\$ 41,116	\$ 39,947	\$ 33,207	\$ 5,048	\$ 5,048
Net Income:	(\$ 1,931,469)	\$ 3,407,057	\$ 1,287,822	(\$ 2,987,534)	\$ 239,226	\$ 2,063,554	\$ 404,351	\$ 1,301,178	\$ 1,301,178
Net Assets:	\$ 29,238,231	\$ 31,169,700	\$ 27,762,643	\$ 26,474,821	\$ 29,462,355	\$ 29,223,129	\$ 25,809,931	\$ 26,914,282	\$ 26,914,282

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

Features  
 2E - Profit-sharing

Auto-Dial

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

Use to add your own contact info

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

Group Flag Print Prev Next

Print button

Scrolling buttons. USE THEM!

# Retirement Details – Financials

Financials									
	2018	2017	2016	2015	2014	2013	2012	2011	2010
BOY Assets:	\$ 31,169,700	\$ 27,762,643	\$ 26,474,821	\$ 29,462,355	\$ 29,223,129	\$ 27,159,575	\$ 25,809,931	\$ 26,914,282	\$ 25,613,104
Liabilities:	\$ 61,029	\$ 25,611	\$ 28,482	\$ 29,211	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
EE Contrib:	\$ 1,513,941	\$ 1,403,354	\$ 1,245,261	\$ 1,204,482	\$ 1,278,373	\$ 1,354,540	\$ 1,250,305	\$ 1,287,723	\$ 1,395,053
Emp Contrib:	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Income/Loss:	(\$ 2,475,155)	\$ 3,197,525	\$ 1,337,142	(\$ 702,951)	(\$ 195,846)	\$ 3,073,650	\$ 1,467,234	(\$ 250,143)	\$ 2,136,385
Total Income:	\$ 313,280	\$ 5,539,114	\$ 3,218,474	\$ 817,536	\$ 2,671,817	\$ 5,409,020	\$ 3,396,858	\$ 1,400,678	\$ 3,969,617
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Expenses:	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Commission:	\$ 71,332	\$ 50,317	\$ 12,566	\$ 66,711	\$ 41,116	\$ 39,947	\$ 33,905	\$ 33,207	\$ 5,048
Net Income:	(\$ 1,931,469)	\$ 3,407,057	\$ 1,287,822	(\$ 2,987,534)	\$ 239,226	\$ 2,063,554	\$ 1,349,644	(\$ 1,104,351)	\$ 1,301,178
Net Assets:	\$ 29,238,231	\$ 31,169,700	\$ 27,762,643	\$ 26,474,821	\$ 29,462,355	\$ 29,223,129	\$ 27,159,575	\$ 25,809,931	\$ 26,914,282

The **Financials** section provides a historical view of the Prospect’s plan

**Contributions** are separated from the income field and broken down by Employer and Employee for a more granular view, and accurate representation of performance.

**Income/Loss** indicates the plan’s overall performance. It is the net gain or loss on investments.

**Total Income** is the bottom line. In this case, we can see that the total income was seriously eroded by the plan’s performance.

**Retirement Details – Plan Features & Participation**

**Features**

- 2E - Profit-sharing
- 2F - ERISA section 404(c) Plan - This plan, or any part of it is intended to meet the conditions of 29 CFR 2550.404c-1.
- 2G - Total participant-directed account plan - Participants have the opportunity to direct the investment of all the assets allocated to their individual accounts, regardless of whether 29 CFR 2550.404c-1 is intended to be met.
- 2J - Code section 401(k) feature - A cash or deferred arrangement described in Code section 401(k) that is part of a qualified defined contribution plan that provides for an election by employees to defer part of their compensation or receive these amounts in cash.
- 2K - Stock bonusCode section 401(m) arrangement - Employee contributions are allocated to separate accounts under the plan or employer contributions are based, in whole or in part, on employee deferrals or contributions to the plan. Not applicable if plan is 401(k) plan with only QNECs and/or QMACs. Also not applicable if Code section 403(b)(1), 403(b)(7) or 408 arrangements/accounts/annuities.
- 2S - Plan provides for automatic enrollment in plan that has employee contributions deducted from payroll.
- 2T - Total or partial participant-directed account plan - plan uses default investment account for participants who fail to direct assets in their account.
- 3D - Pre-approved pension plan - A master, prototype, or volume submitter plan that is the subject of a favorable opinion or advisory letter from the IRS.

**Participation**

	2018	2017	2016	2015	2014	2013	2012	2011	2010
Total Participants:	226	196	149	137	120	115	110	96	94
Active Part.:	192	152	137	121	107				
Retired Part.:	0	0	0	0					
Deceased Part.:	0	0	0	0					

**Plan Features** provide insight regarding the type of plan the Prospect has

**Participation** this section breaks down participation – total, active, retired & deceased

**Retirement Details – Provider Info**

Providers			
THE VANGUARD GROUP, INC.			
THE VANGUARD GROUP, INC.	Recordkeeping and information management (computing, tabulating, data processing, etc.) Consulting (general) Trustee (directed) Investment advisory (participants) Participant loan processing Investment management fees paid indirectly by plan	Compensation: Relation:	\$72,432 NONE
THE VANGUARD GROUP, INC Source: FIDELITY INVESTMENTS	Other (specify)	Compensation:	25 BPS

Notes		
<input type="text" value="Make a note..."/>		
Agent	Date	Note
None		

**Provider** this section tells you about the Prospect’s current providers, services provided, and compensation

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

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).

**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.

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

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 EXTE	10:05a P	10:05a M	
			10:02a M	10:06a LI		
			10:06a S			
20	21	22	23	24	25	26
27	28	29	30	31	1	2

# CRM Details - Groups

Groups		Filter: <input type="text"/>
⊗ Auto Assn	2	
⊗ benefits	3	
⊗ Contractors Assn	4	
⊗ cowest	1	
⊗ dead files	2	
⊗ Electrical Assn	2	
⊗ Erie	10	
⊗ GCBA-GC's	13	
⊗ Ins Mktng 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

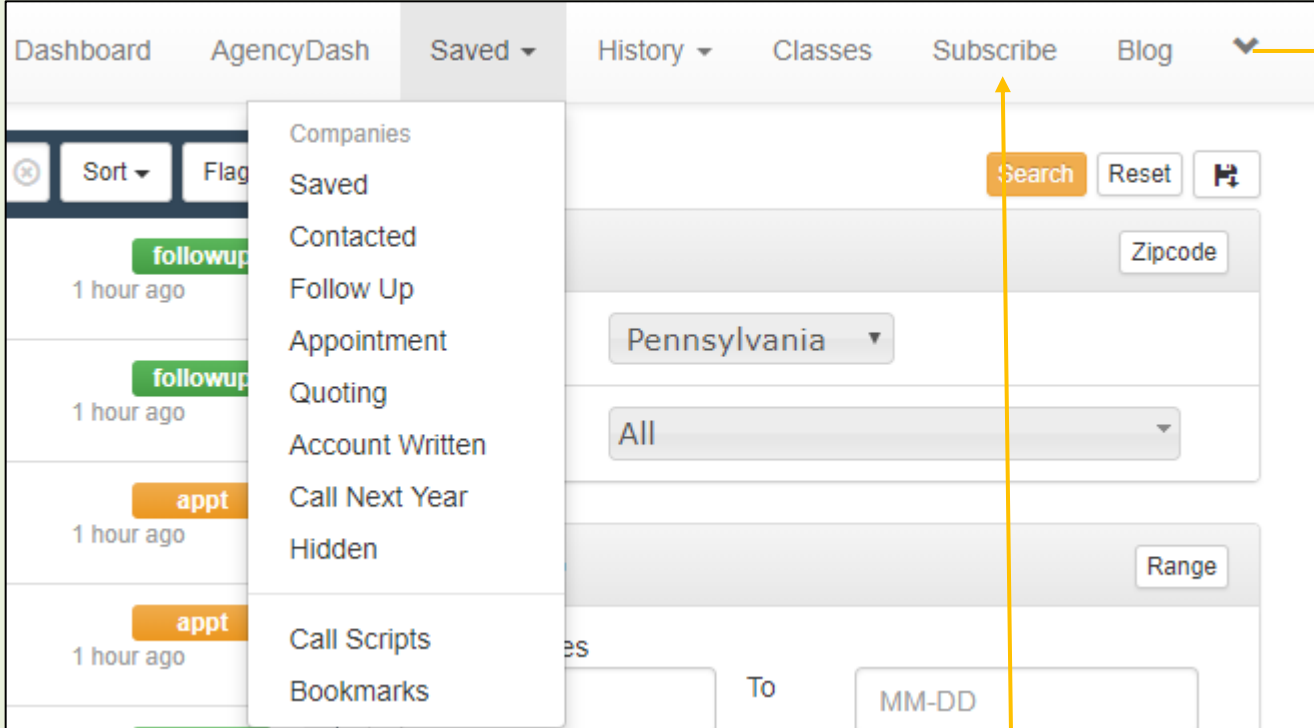
1-10 Of 13 Saved Companies

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

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



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.

# Settings

### Account Settings

Email:

Change Password:

### Account Preferences

Show Agent Activity

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	X
Nathanael Weber (Agent)	nathanaelcw@gmail.com	X

#### Add An Agent

First Name:

Last Name:

Email:

Password:

Account Type:

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.