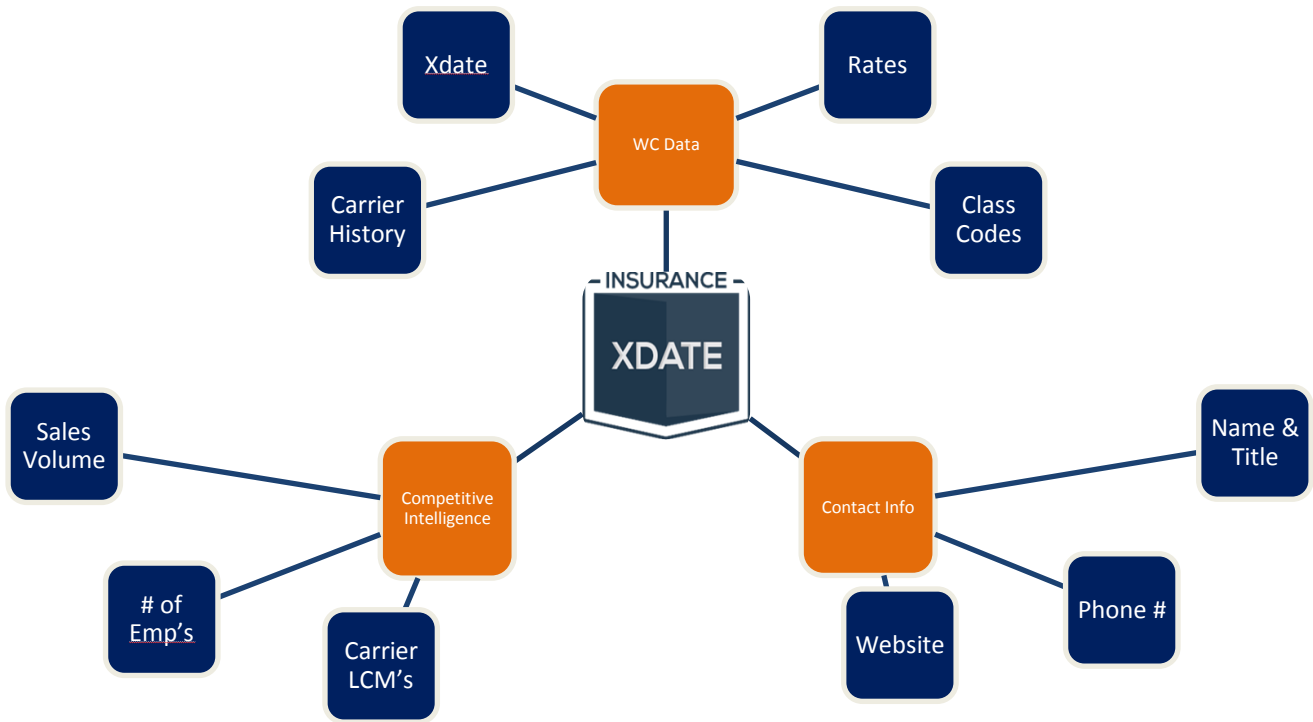


InsuranceXdate.com User Guide



Contact:

Email – support@insurancexdate.com

Phone – 215-839-9991

*Search by key word or phrase in this document using ctrl+f

*Click on any Heading the in the Table of Contents to go directly to section

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Getting Started

Free Trial Sign up – home page for www.InsuranceXdate.com

INNOVATIVE PROSPECTING FOR THE COMMERCIAL INSURANCE AGENT

InsuranceXdate.com is a prospect and lead management system for commercial insurance agencies that is designed to bring more efficiency to the new business production process. Whether you are at the office, home or on the road you can access any business's information and immediately know when their policy renews, their industry, the rate they're paying, their current WC Carrier, their contact information and more. Agencies using our system are more productive because they generate a higher volume of qualified opportunities and spend less time on prospecting tasks, leaving them with more time for actual selling.

See for yourself by signing up for our free 3 day trial or just give it a try with these Xdates right now:

From: To:

JOIN NOW FOR FREE

First Name


Last Name

Email
*This will be your name for Login

Password

- To sign up for a free 3 day trial, enter your First name, Last name, Email address, create a Password and click "Join Us"
- Your email address is your User ID

Logging In – top of home page for www.InsuranceXdate.com

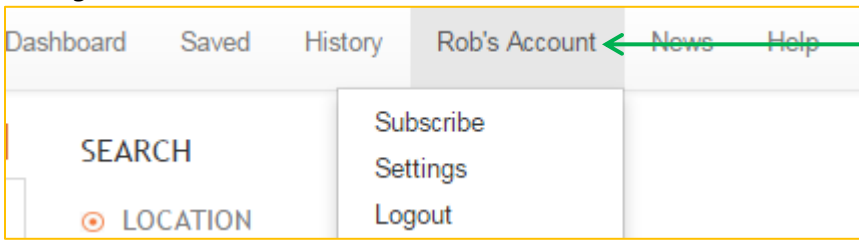
 EVERYTHING A COMMERCIAL INSURANCE AGENT NEEDS TO MAKE THE CALL

Email Password

[Home](#) [Join Free](#) [States](#) [Tutorial](#) [FAQs](#) [News](#) [Contact Us](#)

- Whether you are using a Trial account or a Subscriber, you will login here with your email address and the password you created
- Once logged in you will be taken directly to your Dashboard
- Forgotten Password? Email support@insurancexdate.com to have it reset

Settings Menu



To Access your Settings click on “(your name’s) account” and choose “Settings” from the dropdown menu

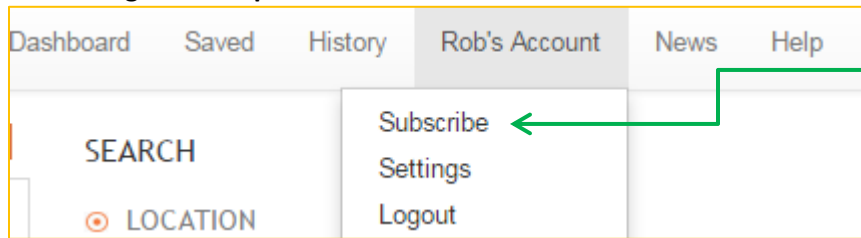
Master Subscription Settings Menu – Adding/Deleting/Updating User Information

Master Subscribers have the option of viewing Agent Users’ activity (notes & contacts) in their Dashboard by checking this box

Master Subscribers can add or delete Agent Users here
-To Delete a user click on the **x** to the right of their name

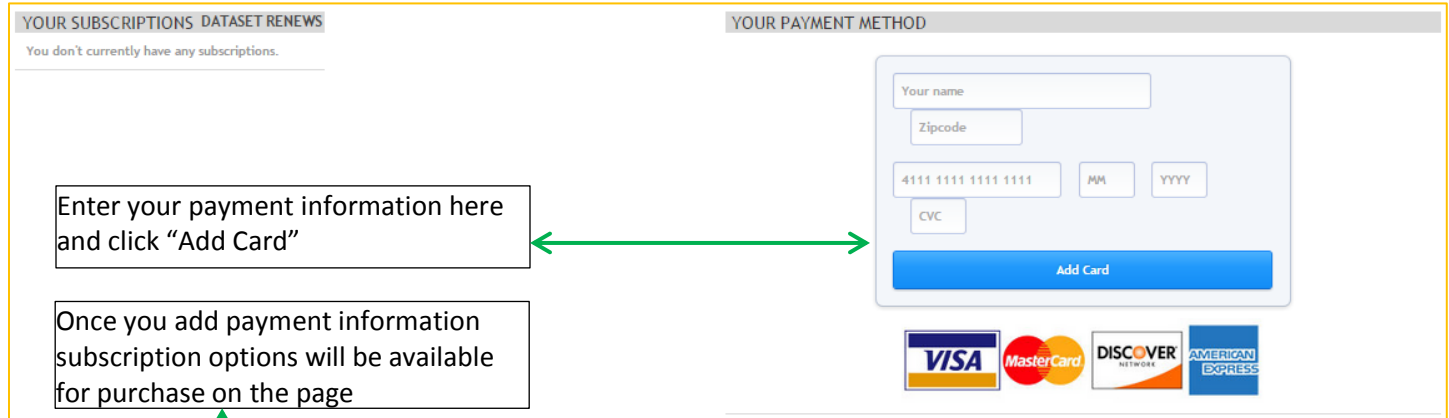
Users can update their email address and password here (available for all users)

Purchasing a Subscription



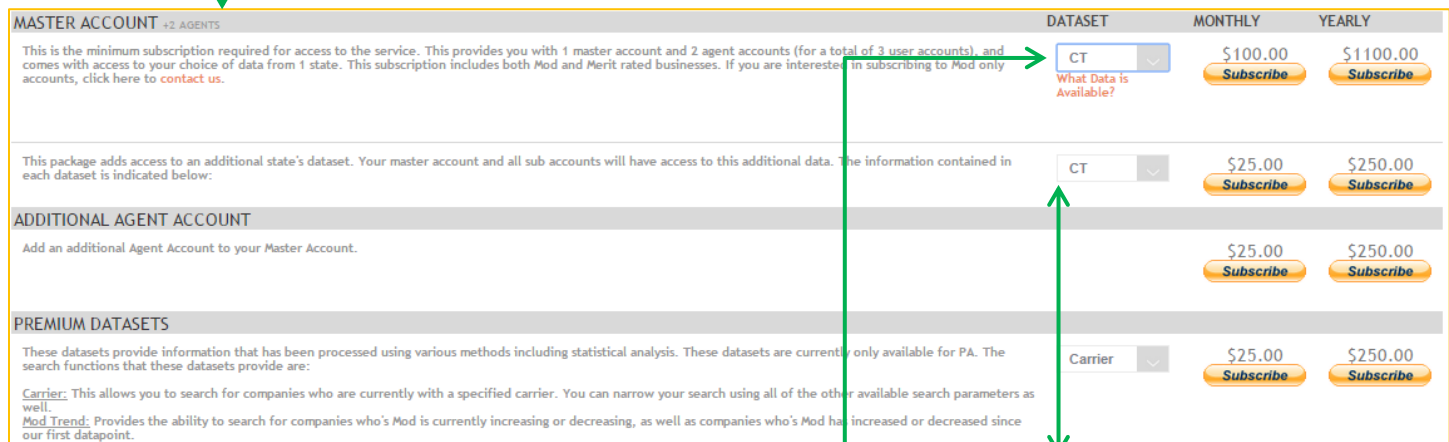
After logging in click on “(your name’s) account” and choose “Subscribe” from the dropdown menu

Subscriptions Page



Enter your payment information here and click “Add Card”

Once you add payment information subscription options will be available for purchase on the page



A **Master Account** is the minimum requirement for access and must be purchased first – choose your state from the dropdown box and click the **Subscribe** button that matches your preferred billing cycle (monthly or annual)

To add an additional **State’s** data set, choose state from dropdown box and click the **Subscribe** button that matches the billing cycle of your Master Account

A Master Account includes a total of 3 user Licenses
 -To purchase additional Licenses click the **Subscribe** button in the “**Additional Agent Account**” section
 -Pricing discounts are available if more than 4 additional licenses are required, contact us to discuss

Premium Datasets:
 1) Carrier Search – Enables you to search for businesses with a specific insurance Carrier
 2) Mod Trends – Enables you to search for businesses who’s Mod is trending up or down over a specified period of time (available PA only)

Information Availability by State

STATE	NAME	ADDRESS	XDATE	CLASS	MOD	CONTACTS	CARRIER	EMPLOYEES	SALES	PREMIUM	MOD TREND
Connecticut	✓	✓	✓	✓		✓	✓	✓	✓		
Florida	✓	✓	✓	✓		✓	✓	✓	✓		
Georgia	✓	✓	✓	✓		✓	✓	✓	✓	✓	
South Carolina	✓	✓	✓	✓		✓	✓				
New Jersey	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Pennsylvania	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Texas	✓	✓	✓	✓		✓	✓	✓	✓	✓	

Search Capability by State

	CT	FL	GA	NJ	PA	SC	TX
County	☒	☒	☒	☒	☒	☒	☒
Zip Code	☒	☒	☒	☒	☒	☒	☒
Xdate	☒	☒	☒	☒	☒	☒	☒
Class Code	☒	☒	☒	☒	☒	☒	☒
Mod Range				☒	☒		
Carrier	☒	☒	☒	☒	☒	☒	☒
Name	☒	☒	☒	☒	☒	☒	☒
Premium			☒	☒			☒
# EE's	☒	☒	☒	☒	☒	☒	☒
Gross Sales	☒	☒	☒	☒	☒	☒	☒
Assigned Risk	☒		☒	☒			
Mod Trend				☒	☒		

*NJ – Carrier & Premium information limited to Assigned Risk Accounts only

*Premium estimates for all states do not include all rating factors



Creating & Saving a Search

Search dialogue displays on the right hand side of your screen or on the bottom of your screen page, depending on your monitor size. Here is an overview of how to create a search:

LOCATION
State County
CT
Within Miles Of Zipcode

EFFECTIVE DATES
From MM-DD To MM-DD

POLICY INFO
Class Code Multi | Sort
From 0 - All To 0 - All

Current Carrier
All

COMPANY
Name
Name
Employees
From All To All
Co. Size
From All To All

ASSIGNED RISK
Assigned Risk Only

Search Reset

Location –

- 1) Select State
- 2) You may choose a County or Zip Code Radius (this is detailed in the following page) – this example shows the Zip Code Radius option

Effective Dates –

- 1) Enter your dates in MM-DD format, do not include the year
- 2) If you want to search based on 1 day, enter that date in both fields

Class Codes – This example shows the Range option for choosing Class Codes

- 1) Make sure codes are sorted numerically, by code # (sorting is detailed in following page)
- 2) Choose codes – ensure your ‘from’ and ‘to’ codes are in order
 - Example: 0601 to 0681 (correct)
 - Example: 0681 to 0601 (incorrect, will result in error)

Current Carrier – (Premium Feature)

- 1) Simply choose the Carriers you’d like to target by checking them in the drop down box, you may choose a maximum of 10 carriers per search

Company Name –

- 1) Type the name of the company you are searching for, it is recommended you clear all other search fields when using this method

Demographics - # of Employees & Gross Sales Estimates –

- 1) Choose your ranges using the available options in the drop down box
- 2) Make sure you choose a value for both the ‘from’ and ‘to’ fields

Assigned Risk – availability depending on state –

- 1) Checking this box will limit your search to Assigned Risk businesses only

Saving a Search –

- 1) **AFTER** clicking on the “Search” button, your results will appear, and you will notice a “Save Search” dialogue appear below the search menu
- 2) **Before** saving your list, ensure it is **sorted** the way you want, for details on sorting see the “List View” section
- 2) You have the option of saving your Xdates “statically” or as a “range”
 - Static** – dates remain the same each time you open the search
 - Range** – dates are treated as a range (i.e. 30 to 90 days from the day you open the search)
- 3) Name your search by typing a name in the text box
- 4) Click “Save”

SAVE SEARCH

Set dates as 02-05 to 04-05

Set dates as range for 31 to 90 days out.

Name this search

Save

Creating a Search – Additional Features

You have several different options for Location and Class Code search criteria as indicated below:

LOCATION
 State [County](#)
 CT
 Within Miles Of Zipcode

EFFECTIVE DATES
 From MM-DD To MM-DD

POLICY INFO
 Class Code [Multi](#) | [sort](#)
 From 0 - All To 0 - All

Current Carrier
 All

COMPANY
 Name
 Name

Employees
 From All To All

Co. Size
 From All To All

ASSIGNED RISK
 Assigned Risk Only

LOCATION
 State [Zipcode](#) [County](#)
 CT All

Location – You may toggle between a Zip Code Radius or County search by clicking on the ‘link’ above the State selection drop down box, indicated here with a green arrow (“County” or “Zipcode”)

Multiple Code Selection Display

POLICY INFO
 Class Code [Multi](#) | [sort](#)
 All
 Enter keywords Clear
 5 - FARM NURSERY EMPLOYEES & DRIVE
 8 - FARM PRODUCTS - RAISING, HARVE
 16 - FARM ORCHARD OR GROVE & DRIVER
 34 - FARM POULTRY OR EGG PRODUCER &

Class Codes – You may toggle between a Range of Class Codes or selecting individual Class Codes by clicking on the ‘link’ to the right of the heading “Class Code”, indicated here with the green arrow (“Multi”)

Sorting Class Codes – You may sort class codes by clicking on the “sort” link to the right of the “Multi” link. Options are to sort numerically by Class Code # or alphabetically by Class Code Description

Important Notes about changing Search Fields –

- 1) When changing between Zip Code Radius or County, class code Range or Multi select, or Sorting class codes - **previously entered search criteria will be erased**
- 2) It is advised that you determine which type of search you will use before inputting your search criteria to avoid this
- 3) For example – if you enter your effective dates, then choose to switch from Class Code Range to Multi Select, your effective dates will be erased

SAVE SEARCH

Set dates as 02-05 to 04-05
 Set dates as range for 31 to 90 days out.

Name this search

Important Notes about Replicating a Saved Search –

- 1) When loading a Saved Search, your search criteria will reload into the search fields
- 2) You can quickly create a new search by editing the fields you wish to change, rerun the search and saving it

List View

Sorting your list

NAME	ADDRESS	CLASS	MOD	EXP. DATE		
HADCO METAL TRADING CO LLC http://www.hadco-metal.com/	2811 CHARTER RD PHILADELPHIA, PA 19124	857 Metal Service Center	1.180	2016-03-01	4	0
HATZEL & BUEHLER INC http://www.hatzelandbuehler.com/	1600 MARKET ST PHILADELPHIA, PA 19103	660 Alarm And Sound System	0.809	2016-03-01	2	0
HAY GROUP INVESTMENT HOLDING LTD http://www.caretolearn.net/	100 E PENN SQ PHILADELPHIA, PA 19107	953 Office	1.006	2016-03-01	3	0
HAYDON BOLTS INC http://www.haydonbolts.com/	ADAMS AVENUE & UNITY STREET PHILADELPHIA, PA 19124	926 Hardware Stores - Wholesale	0.799	2016-03-01	4	0

- List is **sortable** by clicking on any of the header rows, highlighted in **green**, in ascending or descending order

Basic Information Display

HATZEL & BUEHLER INC http://www.hatzelandbuehler.com/	1600 MARKET ST PHILADELPHIA, PA 19103	660 Alarm And Sound System	0.809 Print *Beta	2016-03-01	2	0
---	--	-------------------------------	----------------------	------------	---	---

1- Business Name
2- Website (as available)

Business Address

1- Primary Class Code
2- Description

Renewal Exp Mod
(as available)

Expiration
Date

Contact Information
- The # (2) refers to the #
of contacts available

Notes Section
- The # (0) refers to the #
of notes made by agents
within your organization

Options

LEM MANAGEMENT LP	2929 ARCH STREET PHILADELPHIA, PA 19104	953 Office	NQ-ER	2015-03-01	1	0
<p>Export Bookmark</p> <p><< < 2 3 4 5 6 7 8 > >></p> <p>10 Listing 10 Listing 25 Listing 50 Listing</p>						

1- This allows scrolling
through pages
2- Function is available at the
top and bottom right corners
of your list

1- Allows you to change the #
of listings per page
2- Available at the bottom
right corner of your list

Viewing Detailed Account Information

Each listing has additional information available and is accessed by clicking on the listing with your mouse. Below are further details on how to access and what information is available.

Demographic Info

- Clicking on the area highlighted in **green** (name and address area) will display available demographic information (# of Employee, Gross Sales & Premium estimates – as available)
- Users have the option to add information to their database using the drop down selection box and clicking the 'add' button
 - o Fields available: # of Employees, Gross Sales, Payroll, Losses and Premium

Detailed Workers Comp Info

CLASS CODE	DESCRIPTION	BASE RATE	MODIFIED RATE
603	Sewer Construction	5.16	9.5718
617	Gas Steam Or Water Main Const.	3.43	6.36265
951	Salesperson - Outside	.32	0.5936
953	Office	.15	0.27825
9046	Construction Class Premium Credit	.14	0.2597
9890	Safety Committee Credit 5%	.05	-

POLICY TERM	EXP. MOD	CARRIER	LCM
2014-03-01 - 2015-03-01	0.792	ZURICH AMERICAN INSURANCE CO	1.85500
2014-02-24 - 2015-02-24	0.792	ARCH INSURANCE CO	1.71000
2014-01-03 - 2014-11-13	0.792	LIBERTY INSURANCE CORPORATION	1.53600
2014-02-15 - 2014-04-15	-	AMERICAN ZURICH INSURANCE CO	1.29900

- Clicking on the area highlighted in **green** (Class, Mod and Exp Date area) will display available Workers Comp information (See Information Availability section for a list of what is available by state)

Viewing Detailed Account Information (continued)

Contact Information

JPC GROUP INC
<http://www.jpccgroupinc.com/>

1309 S HARMONY ST 1309 11 13 1
PHILADELPHIA, PA 19146

603
Sewer Construction

0.744

2016-03-01

3 0

Contacts

info@jpccgroupinc.com 215-339-9404 Joseph Petrongolo Jr
President
215-243-9660

Name	Position	Phone	Email
------	----------	-------	-------

Add

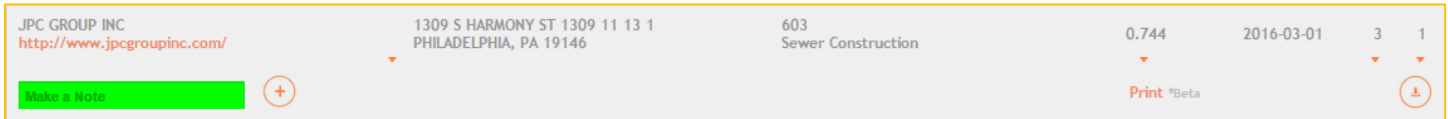
Make a Note (+)

Print *Beta

- To view Contact information, click on the area highlighted in green
- The # (3) shown in this field relates to the # of contact information available
- Users can add their own contact information to their database using the structured contact fields

User Tools

Making a Note



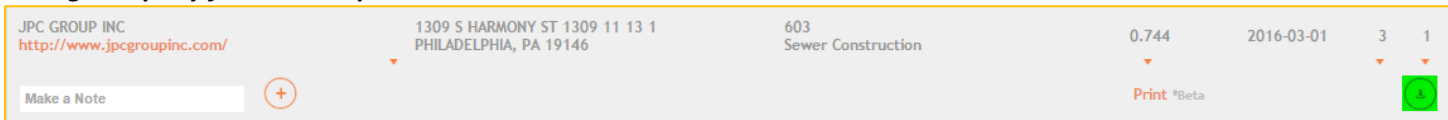
- To make a Note, simply type in the “**Make a Note**” field in the lower left corner of a listing and hit enter or click the **+** button to save

Accessing Notes



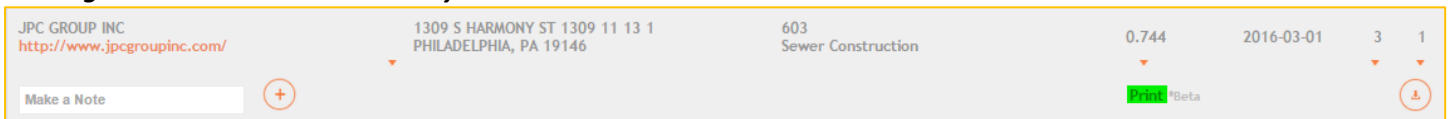
- To view notes click on the area highlighted in **green**
- Notes will display below the listing including the day/time the note was made and the person who made the note
- To delete a note, click on the **x** button
- The # **(1)** indicates the # of notes made for this business listing

Saving Company for Follow Up



- To save a company click on the **↓** button, highlighted in **green**
- To view your Saved Companies, see Dashboard section (page 12) and Saved Companies (page 13)

Printing a Detailed Account Summary



- To print an Account Summary **RIGHT-CLICK** on the **Print** link, highlighted in **green**, and open in a new tab or new window
 - o Opening in a new tab or window will keep your place on the list

Printing a Detailed Account Summary (continued)

Select One | Load | Save | Print | Acord130

KILDARE'S MANAYUNK INC effective: 2014-03-01
 4417 MAIN STREET
 PHILADELPHIA PA 19127

Contact: Dave Magrogan FEIN: 200362534
 Phone: 215-482-7242 Bureau #: 3211011
 SIC: 0

Renewal Mod: 0.843

Current Term:

Class Code	Description	Base	Final Rate	Payroll	# EE
953	Office	.15	0.21	\$	
899	Bar, Nightclub	1.28	1.79	\$	

Mod & Carrier History

Policy Year	Mod	Mod Inc/Dec	Carrier	LCM	Policy #
2014	0.857	0%	TOWER NATIONAL INSURANCE CO	1.40000	WCC0036273
2013	0.853	-15%	TOWER NATIONAL INSURANCE CO	1.40000	WCC0036273
2012	1	-26%	TECHNOLOGY INSURANCE CO	1.45000	TWC3308488
2011	1.358	0%	TECHNOLOGY INSURANCE CO	1.45000	TWC3277353
2009	1.086	25%	TECHNOLOGY INSURANCE CO	1.45000	TWC3199725
2008	0.869	3%	NOVA CASUALTY CO	1.70000	ADCWC0010436C
2007		-100%	TECHNOLOGY INSURANCE CO	1.45000	TWC3133835
2006		0%	TECHNOLOGY INSURANCE CO	1.45000	TWC3100304

Related Lines Summary

Property		Exposure	Premium	Losses	Loss Ratio
Property	TIV	\$	\$	\$	
GL	Payroll	\$	\$	\$	
	Sales				
IM	Sch Equip	\$	\$	\$	
BA	# Units	\$	\$	\$	
Umb	Limit	\$	\$	\$	
WC	Payroll	\$	\$	\$	

Notes:

Fields prefill with all available information

Users can enter **payroll** info here, which will transfer to an Acord 130

If Exp Mod history is available, the % change from previous year will automatically calculate here

Form prefills with all available info for Carrier, LCM and Policy #'s

A current term summary of Exposure, Premium and Losses is available for user input for typical Commercial coverages

If user enters **Premium and Loss** information, the **Loss Ratio** will automatically calculate here

Any special notes can be made here

*Controls for saving, loading and exporting info available on following page



Printing a Detailed Account Summary (continued)

(Enlarged view of controls at top of print page)

Steps for Saving & Loading information:

<p>STEP 2 - When saving info, it is date and time stamped for future retrieval and can be selected here</p>	<p>STEP 3 - After selecting your saved file, click here to load it</p>	<p>STEP 1 - After entering information, you can save by clicking here</p>	<p>To Print your form, click here</p>	<p>To Export to an Acord 130, click here. Information entered by user, such as payroll and # of EE's, will also export</p>
--	---	--	--	---

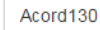
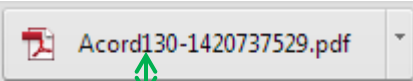

Important Notes about Exporting Acord 130:

- 1) This feature only works using the **Google Chrome web browser** and has glitches
- 2) There is a specific, but easy, procedure to avoid these glitches, detailed below

Causes of Error when Exporting to Acord 130:

- 1) If you open file from your computer (as opposed to the web browser) it will be a blank document


Procedure for Exporting to Acord 130:

- 1) Click  button as indicated above
- 2) A box will appear at the bottom left corner of the page as shown here:
 
- 3) Click here  to open file (this will open file in web browser and is the only way to have information transfer to a fillable form)
- 4) You can complete the form using the fillable fields before printing

Causes of Error when Printing or Saving to Acord 130:

- 1) If you try to save as a PDF, it will save a blank form
- 2) If you try to print to PDF it will save a blank form

Procedure for Saving/Printing Acord 130:

- 1) You may print using the web browser's functions or by clicking on the  icon in lower right corner of Acord form

Option 1 - Select a physical printer and print

Option 2 - Choose the "Save to Google Drive" option (if you have an account) and save – this will provide you with a PDF version of form

Exporting a Search

The Export function is located at the bottom left corner of the list view page

To Export your list, click on the **Export** button and your list will be downloaded

Lists export as an Excel CSV file, below is an example of the output:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	name	lat	long	id	address	city	state	zip	effdate	mod	class	classdesc	phone
2	A & A LUMBER SUPPLY LLC	39.79144	-75.7249	14	109 OLD LIMESTONE ROAD	AVONDALE	PA	19311	1/1/2016	0.859	855	Lumber And BLDG. Material Dealer	610-268-3128
3	A & H SPORTSWEAR CO INC	40.75641	-75.2664	15	101 INDUSTRIAL BLVD	STOCKERTOWN	PA	18083	1/1/2016	1.918	161	Apparel MFG.	610-759-9550
4	A & S HVAC INC	0.000001	0.000001	16	304 SMITH ROAD	BATH	PA	18014	1/1/2016	0.843	664	Heating Or Ventilating	610-261-2640
5	A P HOUSER INC	40.53246	-75.5001	17	706 WALNUT ST	EMMAUS	PA	18049	1/1/2015	0.929	645	Wallboard Installation	610-797-9682
6	AAAA OFFICE & WAREHOUSE SURPLUS INC	40.07803	-74.9295	18	3041 MARWIN AVENUE	BENSALEM	PA	19020	1/1/2016	1.293	921	Furniture Store - Wholesale	215-639-3579
7	AARDVARK SPORTS SHOPS INC	40.62184	-75.382	19	565 MAIN ST	BETHLEHEM	PA	18018	1/1/2016	0.861	916	Clothing Or Dry Goods Store	610-866-8300
8	ABBOTT LABORATORIES	39.90842	-75.4053	20	2 CHIPMUNK LANE	MEDIA	PA	19063	1/1/2016	0.673	924	Wholesale Stores, N.O.C.	847-937-6100
9	ACR PRODUCTS INC	40.75452	-75.2267	21	555 UHLER ROAD	EASTON	PA	18042	1/1/2016	1.25	925	Hardware Stores - Retail	610-253-8005
10	ACRO DISPLAY INC	40.0052	-75.1701	22	3251 FOX STREET	PHILADELPHIA	PA	19129	1/1/2016	1.193	311	Cabinet Works	215-229-1100

Call Sheets

- allows you to print Detailed Account Summary pages for all businesses in a search with 1 click

The Call Sheets function is located at the bottom left corner of the list view page

To produce Call Sheets **RIGHT-CLICK** on the **Call Sheets** button and open in new tab or page. Your list will begin processing

***please note it takes 3 seconds per business to process (A list of 100 businesses will take approximately 5 minutes)**

Once complete, you may print pages to your printer or print to PDF. Do not save the file, it is PHP and will be unreadable.

Bookmarking a Search

ANDERSON TRUCK & AUTO REPAIR LLC 5363 LINCOLN HIGHWAY GAP, PA 17527 815 Automobile Service Centers 1.147 2016-01-01 2 0

Make a Note (+) Print *Beta (x)

Export **Bookmark** 1 2 3 4 5 > >> 50 Listing

The Bookmark function is located at the bottom left corner of the list view page

To Bookmark your page, click on the **Bookmark** button and retrieve it at a later time in the Bookmarks section of the site

A Bookmark allows you to **quickly return to the page you last left off on a prospect list** without having to scroll through pages, as you would by loading a saved search

Retrieving your Bookmark

(Enlarged view of Header Tabs found on Upper Right Corner of webpage)

Dashboard **Saved** History Rob's Account News Help

Bookmarks
Companies
Searches

- 1) Click on "Saved" in the header
- 2) Click on "Bookmarks" in the dropdown list to open page
- 3) Load your Bookmark by clicking on the link

Bookmarks Page

DATE	LOCATION	CLASSES	EXP. MODS	CARRIER	
2015-01-09 09:12:53	PA Within 50 mile of 19428	0 - 9999	0.1 - 5	All	(x)
2015-01-08 09:08:28	PA	-	-	All	(x)
2014-12-16 10:08:23	PA Within 75 mile of 19428	601 - 681	0 - 0	All	(x)

- Bookmarks are date and time stamped for reference

To delete a Bookmark click on the (x)

Dashboard

Dashboard

SAVED SEARCHES			
1st quarter program classes w/ mod			
GA Mfg, 30-60 days, 25k+ premium			
NJ, gloucester county, 30-60 days, assigned risk			
program classes 1st quarter			
SWIF contractors 30-90 days			
TX, Dallas, 1st Q, \$100k + premium			

LATEST SAVED COMPANIES			
SUPERIOR EXTERIOR LLC			
HEALTH MATS CO			
BUILDER'S DOOR & HARDWARE INC			
PEREGRINE SURGICAL LTD			
BLATT MARVIN TIRE & SERVICE			
RED BULL NORTH AMERICA INC			

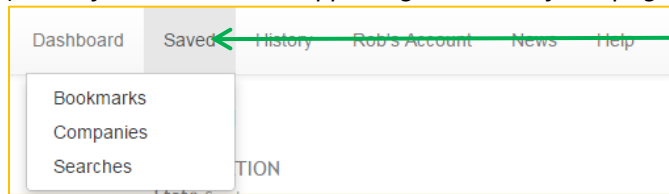
RECENT NOTES			
-1 day	Rob Gifford	JAMES J ANDERSON CONSTRUCTION CO INC	test note
-1 day	Rob Gifford	JPC GROUP INC	Joe handles insurance, spoke to brother mike. said to call back on 1/12
-5 months	Rob Gifford	MALLOY DAN PAVING INC	Bob handles insurance. they do a lot of government bids. appt scheduled for 8/1 at 9:30am
-6 months	Rob Gifford	DIRECT AIR LLC	spoke to Sal C, meeting scheduled for 6-30 at 9am
-6 months	Rob Gifford	DIRECT AIR LLC	Sal C got back to me. they are a union shop, about 500k in payroll. not taking quotes this year. said to call early June, all lines renew 8-2
-6 months	Rob Gifford	DIRECT AIR LLC	spoke to Sal Taormina, he is owner/partner, said Sal Campagna handles insurance. said to email him (email is in contact section).
-7 months	Jill Dagion	SUPERIOR EXTERIOR LLC	spoke to Demian, appt scheduled for 6/10. said he is getting a rate increase. 10 vehicles, 21 EE's
-7 months	Jill Dagion	VANORE ENT OF NJ INC	Small breakfast/lunch shop. spoke to Diana, she owns with husband. happy with Guard

RECENT CONTACTS			
Rob Gifford	MALLOY DAN PAVING INC	Bob Bureski	484-364-3733 Bob@dmalloypaving.com
Rob Gifford	SEA TOWN OF LIBERTY CITY INC	Tim Tufono	Tim@seatown.net
Rob Gifford	DIRECT AIR LLC	Sal Campagna	215-271-9354 scampagna@directair.net
Jill Dagion	SUPERIOR EXTERIOR LLC	Demian Lundfelt	856-848- dlundfelt@superiorextllc.com
Jill Dagion	VFI FABRICATORS INC	Bill Marshall	856-629- bill@vffib.com
Rob Gifford	ALLEN RUBBER CO	Craig Myers	215-745-1400 craig@allenrubber.com
Rob Gifford	HEALTH MATS CO	Vince Del Rossi	610-874-4771 Vince@healthmatsco.com
Rob Gifford	NICKOS CONSTRUCTION INC	Nicko	267-555-5555 Nicko@nickos.com
Rob Gifford	INDEPENDENCE CONSTRUCTORS CORP	Bill ohare	6109709255 Indecon@comcast.net

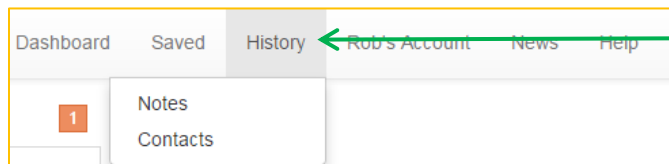
- Upon logging in you will be taken to your Dashboard
- The Dashboard is a snapshot of your most recent Saved Searches, Saved Companies, Notes and Contacts

Each section of the Dashboard has its own page, which can be accessed using the instructions below

(View of Header tabs on Upper Right Corner of webpage)



To Access your **Saved Companies** or **Searches** pages, click on "Saved" in the header row and make your selection from the dropdown menu



To Access your **Notes** or **Contacts** pages, click on "History" in the header row and make your selection from the dropdown menu

Saved Companies Page

NAME ▾	ADDRESS ▾	CLASS ▾	MOD ▾	EXP. DATE ▲		
BUILDER'S DOOR & HARDWARE INC http://www.buildersdoor.org/	1414 E COLUMBIA ST ALLENTOWN, PA 18109	456 Metal Furniture Or Finishing	0.844	2015-04-21	4	1
<input type="text" value="Make a Note"/>						
RED BULL NORTH AMERICA INC	210 BRIDGEWATER ROAD CHESTER TOWNSHIP, PA 19013	821 Beverage Distributors	0.977	2015-07-27	1	0
<input type="text" value="Make a Note"/>						

- Saved Companies Page is similar to the List View and has the same functionality

To delete a company from this list click on the located here

Saved Searches Page

NAME	DATE RANGE	LOCATION	CLASSES	EXP. MODS	CARRIER	EMAIL
1st quarter program classes w/ mod	01-01 to 03-31 (Static)	PA Within 50 mile of 19428	0 - 9999	0.1 - 5	All	
GA Mfg, 30-60 days, 25k+ premium	02-10 - 03-10 (Fluid)	GA	1924 - 6504	0 - 0	All	
NJ, gloucester county, 30-60 days, assigned risk	02-10 - 03-10 (Fluid)	NJ	0 - 9999	0 - 0	All	
SWIF contractors 30-90 days	02-09 - 04-09 (Fluid)	PA Within 75 mile of 19428	601 - 681	0 - 0	All	
TX, Dallas, 1st Q, \$100k + premium	01-01 to 03-31 (Static)	TX	0 - 9999	0 - 0	All	

- Saved Searches Page is a list of your searches with the basic parameters used

To delete a Search from this list click on the located here

Notes Page

DATE	COMPANY	COMMENT
2015-01-08 08:02:51	JPC GROUP INC	Joe handles insurance, spoke to brother mike. said to call back on 1/12
2014-07-29 12:44:11	MALLOY DAN PAVING INC	Bob handles insurance. they do a lot of government bids. appt scheduled for 8/1 at 9:30am
2014-06-25 10:37:36	DIRECT AIR LLC	spoke to Sal C, meeting scheduled for 6-30 at 9am

- Notes Page provides the date/time you made the note, company and note

To delete a Note from this list click on the located here

Contacts Page

COMPANY	NAME	DETAILS
MALLOY DAN PAVING INC	Bob Bureski	484-364-3733 Bob@dmalloypaving.com
SEA TOWN OF LIBERTY CITY INC	Tim Tufono	Tim@seatown.net
DIRECT AIR LLC	Sal Campagna	215-271-9354 scampagna@directair.net

- Contacts Page displays user entered contact information

To delete a Contact from this list click on the located here

Common Errors

We regularly monitor and review activity in an effort to identify common errors and make adjustments to minimize them. If you are experiencing an error, chances are it is covered in this user guide, but if it isn't please contact our support team using the "Contact Us" webpage - <http://www.insurancexdate.com/contact.php> - this will ensure your request is sent to the appropriate team.

Here are the most common underlying factors that result in site errors –

Error	Fix
Not being logged in while searching	Log in
You are not subscribed to "State's" dataset	Make sure you've chosen correct state from dropdown box
No Results (location based)	Make sure Zip Code is appropriate for state
There was a problem with your Class Codes (range)	Make sure your Class Codes are in order
No Results for Business Name Search	Reset Search Parameters before searching by name
Saved Search parameters are not what I saved	When modifying parameters, make sure to rerun search by clicking "Search" before saving
Saved Search is not Sorted correctly	Make sure to Sort your search before saving it
Search fields keep resetting while creating list	See Page 7 (Important Notes about Changing Search Fields)