



EZLynx - Create and Send eSignature Envelope

Downloaded on – Dec. 9, 2024, 3:23 a.m.

All documents requiring signature from a client should be sent via eSignature feature inside of EZLynx for automated tracking and documentation purposes. This creates efficiency for the agency and well as protects agency E&O.

[EZLynx - Create and Send eSignature Envelope](#)

1 Go to Client Account



2 Click on Documents Tab



Make sure Document you want to send for signature has been Uploaded

3 Click on eSignature Envelope



The screenshot shows the EZLynx software interface. At the top, there is a navigation bar with tabs: Overview, Policies, Details, Submissions, Quotes, Lead Info, Documents (which is currently selected), Certificates, Activity, and Invoices. Below the navigation bar, there is a search bar labeled "Document Name or Policy #". To the right of the search bar are buttons for "Pin Folders To The Top", "Add", and "Actions". A message indicates "Available Storage: 822.93MB (17%)". The main area displays a table of documents:

Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions
Form	Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020		Actions
Form	Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020		Actions
Certificate	Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020		Actions

Below the document list, there is a section titled "EZLYNX ESIGNATURE BY ASSURESIGN". It includes fields for "Recipient", "Envelope Name", "Reference #", "Sent", "Received", "Status", "Share", and "Actions". A button labeled "Create eSignature Envelope" is visible. A message at the bottom of this section says "No records found. Modify your search and try again."

4 Choose Document to Send for Signature



5 Setup Envelope



1. Give document a name
2. Set a Password (Optional). You can click on 'No' to disable or 'Yes' to enable and choose a password.
3. Set the number of days before envelope will expire - defaults at 30
4. Arrange order of documents you are sending by clicking arrows for up or down.

Create eSignature Envelope

Step 2: Setup Envelope

Send as EZLynx Admin User [Change](#)

Envelope Name * [X](#)

Setup Recipient

Setup Signature

Reference #

Password Required? Yes No

Password *

Schedule

Envelope will expire in * days 1/30/2021

Signer will be warned of expiration in days 1/25/2021

Document Order

Order	Document Name	Document Type
↑ ↓	Commercial Insurance Application	PDF

[Previous](#) [Next](#)

6 Add Recipient Email Address



1. Email address will appear if populated in the Client Details screen. If no email address is present, you can manually type it in.
2. You can also Add Recipients, if applicable or if more than one person is required for signature.
3. Input message or note - This will be the body of the email/message to the Recipients.

Create eSignature Envelope

Step 3: Setup Recipient

Order	Name	Email	Action
	Joel Williams	x_joelsautomotive@joesauto.com	
	EZLynx Admin User	x_email@email.com	

+ Add new recipient + Add me

Note to all Recipient(s)
Please sign the attached document, thanks!

Characters: 42/250

Previous Next

7 Setup Signature Fields



Click on a Signature Options from left-hand panel and click on field on document where signature needs to go.

Select an item from the left area and click on the document where you would like the item to be placed.

Tools Thumbnails

Recipient: Joel Williams

- Signature
- Typed Signature
- Initials
- Typed Initials
- Date
- Timestamp
- Text
- Dropdown
- Multiple Choice

The UNDERSIGNED IS AN AUTHORIZED REPRESENTATIVE OF THE APPLICANT AND REPRESENTS THAT REASONABLE INQUIRY HAS BEEN MADE TO OBTAIN THE ANSWERS TO QUESTIONS ON THIS APPLICATION. HE/SHE REPRESENTS THAT THE ANSWERS ARE TRUE, CORRECT AND COMPLETE TO THE BEST OF HIS/HER EDIFICATION.

PRODUCER'S NAME (Please Print)	STATE PRODUCER LICENSE NO. (Required in Florida)
EZLynx Admin User	NATIONAL PRODUCER NUMBER

ACORD 127 (2015/12) Page 4 of 4

8 Review Document and Click 'Send'



9 View Status, Resend or Delete



From the Documents tab, you can see the status of the document, if it is pending, completed or closed.

You can also view the document, resend for follow-up or delete if an error has been made or signature is no longer required.

The screenshot shows two tabs: 'Documents' and 'eSignature'. The 'Documents' tab is active, displaying a list of three documents:

Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions
Form	Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020		Actions
Form	Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020		Actions
Certificate Master	Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020		Actions

The 'eSignature' tab is shown below, displaying one envelope entry:

Recipient	Envelope Name	Reference #	Sent	Received	Status	Share	Actions
Joel Williams	Joel's auto application		12/29/2020 12:39 PM		Pending		Actions

A red box highlights the 'Actions' dropdown menu for the envelope, which includes options: View, Resend, and Delete.

10 Completed - eSignature Obtained from client



Once signatures have been obtained, status will automatically change to **Completed**.

You can share to **Client Center**, view the document or **Email** it to a carrier or other applicable party.

Overview	Policies	Details	Submissions	Quotes	Lead Info	Documents	Certificates	Activity	Invoices																																								
Available Storage: 813.07MB (18%)																																																	
<input type="text" value="Document Name or Policy #"/> <input type="button" value="Search"/> <input type="button" value="Filter"/> <input type="button" value="X"/> Pin Folders To The Top <input type="checkbox"/> Add <input type="button" value="Actions"/> 																																																	
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Type</th> <th>Document Name</th> <th>Document Type</th> <th>Policy #</th> <th>Created By</th> <th>Date Created</th> <th>Date Modified</th> <th>Share</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>Commercial Insurance Application</td> <td>Form</td> <td>N/A</td> <td>EZLynx Admin User</td> <td>12/29/2020</td> <td>12/29/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Workers Comp 24</td> <td>Form</td> <td>N/A</td> <td>EZLynx Admin User</td> <td>10/9/2020</td> <td>10/9/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Master Certificate of Property Insurance 20-21</td> <td>Certificate Master</td> <td>8991</td> <td>EZLynx Admin User</td> <td>10/9/2020</td> <td>10/9/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> </tbody> </table>										<input type="checkbox"/>	Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions	<input type="checkbox"/>		Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020	<input type="checkbox"/>	Actions	<input type="checkbox"/>		Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions	<input checked="" type="checkbox"/>		Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions
<input type="checkbox"/>	Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions																																								
<input type="checkbox"/>		Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020	<input type="checkbox"/>	Actions																																								
<input type="checkbox"/>		Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions																																								
<input checked="" type="checkbox"/>		Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions																																								
1																																																	
EZLYNX ESIGNATURE BY ASSURESIGN <div style="float: right;"> Create eSignature Envelope </div> <table border="1"> <thead> <tr> <th>Recipient</th> <th>Envelope Name</th> <th>Reference #</th> <th>Sent</th> <th>Received</th> <th>Status</th> <th>Share</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Joel Williams, EZLynx Admin User</td> <td>Joel's auto application</td> <td></td> <td>12/30/2020 1:23 PM</td> <td>12/30/2020 1:24:23 PM</td> <td><input checked="" type="checkbox"/> Completed</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> </tbody> </table> <p style="margin-top: 10px;"> <input type="button" value="<<"/> <input type="button" value="<"/> <input checked="" type="button" value="1"/> <input type="button" value=">"/> <input type="button" value=">>"/> 1 to 1 of 1 Entries Page Size: <input type="button" value="10"/> </p>										Recipient	Envelope Name	Reference #	Sent	Received	Status	Share	Actions	Joel Williams, EZLynx Admin User	Joel's auto application		12/30/2020 1:23 PM	12/30/2020 1:24:23 PM	<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Actions																								
Recipient	Envelope Name	Reference #	Sent	Received	Status	Share	Actions																																										
Joel Williams, EZLynx Admin User	Joel's auto application		12/30/2020 1:23 PM	12/30/2020 1:24:23 PM	<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Actions																																										

Overview	Policies	Details	Submissions	Quotes	Lead Info	Documents	Certificates	Activity	Invoices																																								
Available Storage: 813.07MB (18%)																																																	
<input type="text" value="Document Name or Policy #"/> <input type="button" value="Search"/> <input type="button" value="Filter"/> <input type="button" value="X"/> Pin Folders To The Top <input type="checkbox"/> Add <input type="button" value="Actions"/> 																																																	
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Type</th> <th>Document Name</th> <th>Document Type</th> <th>Policy #</th> <th>Created By</th> <th>Date Created</th> <th>Date Modified</th> <th>Share</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>Commercial Insurance Application</td> <td>Form</td> <td>N/A</td> <td>EZLynx Admin User</td> <td>12/29/2020</td> <td>12/29/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Workers Comp 24</td> <td>Form</td> <td>N/A</td> <td>EZLynx Admin User</td> <td>10/9/2020</td> <td>10/9/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Master Certificate of Property Insurance 20-21</td> <td>Certificate Master</td> <td>8991</td> <td>EZLynx Admin User</td> <td>10/9/2020</td> <td>10/9/2020</td> <td><input type="checkbox"/></td> <td>Actions</td> </tr> </tbody> </table>										<input type="checkbox"/>	Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions	<input type="checkbox"/>		Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020	<input type="checkbox"/>	Actions	<input type="checkbox"/>		Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions	<input checked="" type="checkbox"/>		Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions
<input type="checkbox"/>	Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions																																								
<input type="checkbox"/>		Commercial Insurance Application	Form	N/A	EZLynx Admin User	12/29/2020	12/29/2020	<input type="checkbox"/>	Actions																																								
<input type="checkbox"/>		Workers Comp 24	Form	N/A	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions																																								
<input checked="" type="checkbox"/>		Master Certificate of Property Insurance 20-21	Certificate Master	8991	EZLynx Admin User	10/9/2020	10/9/2020	<input type="checkbox"/>	Actions																																								
1																																																	
EZLYNX ESIGNATURE BY ASSURESIGN <div style="float: right;"> Create eSignature Envelope </div> <table border="1"> <thead> <tr> <th>Recipient</th> <th>Envelope Name</th> <th>Reference #</th> <th>Sent</th> <th>Received</th> <th>Status</th> <th>Share</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Joel Williams, EZLynx Admin User</td> <td>Joel's auto application</td> <td></td> <td>12/30/2020 1:23 PM</td> <td>12/30/2020 1:24:23 PM</td> <td><input checked="" type="checkbox"/> Completed</td> <td><input checked="" type="checkbox"/></td> <td>Actions</td> </tr> </tbody> </table> <p style="margin-top: 10px;"> <input type="button" value="<<"/> <input type="button" value="<"/> <input checked="" type="button" value="1"/> <input type="button" value=">"/> <input type="button" value=">>"/> 1 to 2 of 2 Entries View View Report <input type="button" value="Email"/> </p>										Recipient	Envelope Name	Reference #	Sent	Received	Status	Share	Actions	Joel Williams, EZLynx Admin User	Joel's auto application		12/30/2020 1:23 PM	12/30/2020 1:24:23 PM	<input checked="" type="checkbox"/> Completed	<input checked="" type="checkbox"/>	Actions																								
Recipient	Envelope Name	Reference #	Sent	Received	Status	Share	Actions																																										
Joel Williams, EZLynx Admin User	Joel's auto application		12/30/2020 1:23 PM	12/30/2020 1:24:23 PM	<input checked="" type="checkbox"/> Completed	<input checked="" type="checkbox"/>	Actions																																										

11 End





EZLynx - Create Policy Change Request

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure should be used for any and all Endorsement Requests. Creating a Policy Change Request should be done at any time you are making a change or endorsement to the policy. If the carrier downloads in EZLynx, the system will automatically match the change request transaction on the policy header.

1 Create Change Request in EZLynx



1. Go to Policy Header
2. Click on Policy Actions Icon (three dots)
3. Click 'Service' and 'Change Request'

The screenshot shows the EZLynx software interface for managing insurance policies. On the left, there's a sidebar with client information for 'Larry Smith'. The main area displays two policy records: 'Homeowners | H15679402' and 'Auto (Personal) | Auto1234'. A context menu is open over the second policy, with the 'Service' option expanded. The 'Change Request' option under 'Service' is highlighted with a red box. To the right, there's a 'Tasks' section with a donut chart and a list of tasks, including 'Change Request' which is also highlighted with a red box. The top navigation bar includes links for Overview, Policies, Details, Quotes, Lead Info, Documents, Certificates, Activity, and Invoices, along with a search bar and various user icons.

2 Complete Change Request Screen



- 1.) Enter Endorsement Effective Date
- 2.) Enter Policy Change Description according to agency naming conventions
YY-YY LOB - Endorsement Req - (Describe Change) - Eff Date
- 3.) Click 'Edit Change Request'

The screenshot shows the EzLynx software interface for managing applicants. On the left, there's a sidebar with various icons and information about an applicant named Larry Smith. The main area is titled 'Change Request Policy'. It displays a form with fields for 'Policy Info' like 'Change Date' (04/12/2022), 'Master Company' (Safeco Insurance), and 'Rating State' (TX). A large text area labeled 'ENTER POLICY CHANGE DESCRIPTION' contains the text 'Adding New Car'. At the bottom right of the form, there are buttons for 'Cancel', 'Change Request', and 'Edit Change Request', with the last one being highlighted by a red box.

3 Update Coverage or Exposure Screens with Changes □

1. Click on Applicable tab for changes being made
2. Manually add or remove coverage or exposures as requested - All changes made will be automatically populated on Change Request form.

The screenshot shows the EzLynx software interface for managing policies. The top navigation bar includes 'Overview', 'Policies', 'Details', 'Quotes', 'Lead Info', 'Documents', 'Certificates', 'Activity', and 'Invoices'. Below this, a specific policy is selected: 'Policy Number: Auto1234 - Active'. The 'Line of Business: Auto (Personal)' has a term from '3/02/2022' to '3/02/2023'. The carrier is 'Safeco Insurance', and the full term premium is '\$825.31'. The source is 'Manual', and the rating state is 'TX'. A message at the top says 'Step 2 of 3: Make your changes for the Change Request. Click "Preview" to preview change request. Click "Save and Close" to confirm your changes.' Below this, there are tabs for 'Insured Information', 'Drivers', 'Vehicles', 'Cov', 'Underwriting', and 'Additional Interests'. The 'Cov' tab is highlighted with a red box. Further down, there are sections for 'Applicants' and 'Locations (Personal AUTO - Garaging Locations)'. The 'Cov' tab is also present in the tabs bar for these sections. At the bottom, there are buttons for 'Save & Close', 'Preview', and 'Cancel'.

4 Preview Change Request for Accuracy



1. Click on 'Preview' button to review policy change request form
2. Review for accuracy or make any manual changes as needed - Note, any changes made on request form directly will not feed back into EZLynx.

The screenshot shows the EZLynx application interface for managing policy changes. On the left, there's a sidebar with user information (Larry Smith) and navigation links. The main area displays a policy summary for 'Auto1234 - Active'. Below it, a table lists vehicles under the 'Vehicles' tab. The 'Preview' button in the top right corner of the table section is highlighted with a red box. The table has columns for Vehicle #, Year, Make, Model, Body Style, and VIN. Each row includes an 'Actions' dropdown menu. Navigation buttons for 'Save & Close', 'Preview', and 'Cancel' are at the bottom of the table, along with 'Previous' and 'Next' links.

5 Generate Change Request Form



1. Click 'Save and Close' to generate Change Request Form
2. Click 'Actions' and 'Email' to send request to carrier u/w or processing center

The screenshot shows the 'Review Change Request' screen. It features a sidebar with user and address details. The main content area is titled 'Review Change Request' and contains a summary of proposed changes. A context menu is open over the 'Actions' button, with 'Email' selected. The menu also includes options for 'Add Note', 'Print', and 'eSignature'. The 'Requested Changes' section shows a table with rows for 'From', 'To', and 'Change Type'. One row is highlighted in blue, showing 'Personal Auto Info' in the 'From' column and 'Assignment : Driver 1 Vehicle :3' in the 'To' column, with an 'Add' button in the 'Change Type' column.

6 Create f/u task using 'Endorsement' checklist in EZLynx



Now that endorsement is sent, you will want to create the next task to follow-up for the endorsement from the carrier.

1. Create task note description - YY-YY LOB - Endt Req - (Describe Change)- Eff Date
2. Click 'Team' icon to assign to another team member
3. Click 'Folder' icon to associate directly to a policy
4. Select due date to follow-up with carrier
5. Click 'Save'

The screenshot shows the 'Add Note' dialog box. At the top, there are search fields for 'Larry Smith' and 'Change Request - Adding New Car'. Below these is a note area containing the text: 'Follow up with Larry to ensure the change summary is signed.' A toolbar below the note includes icons for checkmark, edit, attach, folder, team, and save, with the 'Save' button highlighted. Under the note area, there's a 'Policy' section with a dropdown set to 'Auto1234'. The 'Task Details' section shows 'Assign this task' to 'EZLynx User'. It includes fields for 'Task due date' (set to 4/12/2022) and 'Task due time' (set to 'Task due today'). There are also buttons for 'Add Checklist' and 'Add Reminder'.

7 End





EZLynx - Managing Renewals and Rewrites

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This tutorial is meant as an overview in managing the renewal process, as well as how to properly update policy headers for renewal and rewrites.

At the end of this tutorial you will be able to:

- 1.) Review Account for Pending Renewal
- 2.) Manual Renewals for policies that do not download
- 3.) Remarketing personal lines policies in EZLynx
- 4.) Handling Rewrites

Click here for tutorial: [EZLynx - Renewals and Rewrites](#)

1 Review Client Account for Pending Renewal

If the carrier has offered automatic renewal terms, you will see a policy header downloaded in a "Pending Status" for the following term.

Please note that this does not mean the renewal has been presented to the client or that the client has made their premium payment in order to bind coverage for the next policy term.

2 Follow-up for Renewal Documents on Carrier Portal

If you do not see a pending policy header for the client, check the online carrier portal or follow-up with an underwriter for status of renewal terms or to check if additional information is needed.

3 Remarket Renewals if needed thru EZLynx or Carrier portals

If Personal Lines, you can remarket through the EZLynx Rater.

If Commercial Lines, you can convert the existing policy header into an Application for upcoming policy term and create the Submission(s) to the carrier.

Answers

- [Renewing Policy with Incumbent Carrier Go to step 4](#)
- [Rewriting Policy with Different Carrier Go to step 5](#)

4 Renewing the Policy Header



1. Go to policy header and Click on Actions tab
2. Select "Service"
3. Select "Renew"

The screenshot shows the Lynx software interface for managing an applicant named Jerry Smith. On the left, there's a sidebar with basic client information like address and contact details. The main area is titled 'Account Overview' and contains tabs for 'Policies' (selected), 'Applications', and 'Tasks'. Under 'Policies', it shows a single active policy for 'Homeowners | 34563452'. The 'Actions' dropdown menu is open, and the 'Service' option is selected, with the 'Renew' option highlighted by a red box. Other options in the dropdown include 'Edit', 'Audit', 'Cancel', 'Change', 'Change Request', 'Create Application', and 'Compare'.

4. Review and Update Policy Screen and Coverage Screens

5. Click Save.

Next step 7: End

[Next step 7: End](#)

5 Rewriting a Policy Header that Downloads



If a policy is renewed with a different carrier, this is considered a "Rewrite".

If the carrier downloads the new policy header will be pending, but will also show as "New Business" and must be changed. To do this:

1. Click Actions
2. Click Edit

3. Change Transaction Type from "New Business" to "Rewrite"
4. Associate expired policy number to the rewritten policy header
5. Enter Policy Description Type YY-YY LOB - Rewrite - Name of Carrier
6. Click Save

Kent Boats, LLC

Type: Active Client
Since: 12/1/2021
Assigned: EZLynx User
Agency: AgentLynx Experience

Address
1234 Main Street
Dallas, TX 75202
Map Zillow

Business Info
<http://www.ezlynx.com>
Legal Entity:
LimitedLiabilityCompany
Tax ID: 00-0000000
Business: (877) 932-2382
email@email.com

EZLynx Connect
Quickly access integrations related to this applicant.

Policies

Commercial Prpty | BI456743
Travelers
Premium: \$4,544.00
LOB Origination Date: 12/3/2021
Transaction Type: New Business
Term: 12/3/2021 to 12/3/2022

Commercial Prop

Pending **Commercial Prpty | CP45683**
Stillwater Insurance Svcs, Inc.
Premium: \$4,700.00
LOB Origination Date: 12/3/2021
Transaction Type: New Business
Term: 12/3/2022 to 12/3/2023

Applications

Writing Company: TRAVELERS CAS & SURE..

Writing Company: TRI STATE CONS...

Compare

Edit

Service

Other

Kent Boats, LLC

Type: Active Client
Since: 12/01/2021
Assigned: EZLynx User
Agency: AgentLynx Experience

Address
1234 Main Street Dallas, TX
75202
Map Zillow

Business Info
<http://www.ezlynx.com>
Legal Entity:
LimitedLiabilityCompany
Tax ID: 00-0000000
Business: (877) 932-2382
email@email.com

Primary Contact
No email available

Policies

Note: You are editing a downloaded policy from the carrier.

Master Company *	Travelers	DEPARTMENT	Full-Term Premium *
Billing Type *	Direct	Annual Premium *	\$288.00
Transaction Type	Rewrite	Total Commission	\$288.00
Rewrite Of	DIP1T123456	...Select...	%
LOB Orig. Date	12/08/2021		
Original Producer Code			
Producer Code Override			
Agency Code	0CZD910000		

6 Rewriting a Policy Header Manually



If the carrier has not downloaded yet, you will create a new policy header using one of two methods.

1. Convert Applications created for submission purposes into policy headers as follows:

1. Click Actions from Applications tab
2. Click "Convert to Policy"
3. Change Transaction Type from New Business to Rewrite
4. Associate Expired Policy by selecting the policy number

The screenshot shows the EZLynx software interface. On the left, there's a sidebar for 'Kent Boats, LLC' with sections for Address, Business Info, and EZLynx Connect. The main area has tabs for Overview, Policies, Details, Submissions, Quotes, Lead Info, Documents, Certificates, Activity, and Invoice. The 'Applications' tab is selected. A context menu is open over an application entry, with 'Convert to Policy' highlighted. Below, the 'Add Policy' form is displayed with various fields filled out, including the 'Rewrite' transaction type and the policy number H15679403.

2.) Manually Create Applications to Convert to Policies :

1. From Client Overview Screen, Click green Actions button
2. Click "Add Policy"
3. Change Transaction Type from New Business to Rewrite
4. Associate Expired Policy by selecting the policy number
5. Complete necessary fields, including coverage screens and save

Add Policy

Line of Business	Homeowners	Pre-Fill From	Select Application or Policy
POLICY INFO		PREMIUM & ADDITIONAL CHARGES	
Transaction Type *	Rewrite	Written Premium *	\$1,700.00
Rewrite Of	H15679403	Estimated Fees	
Please enter policy # exactly as it appears on the policy on the carrier's site. A duplicate policy could be created if entered incorrectly.			
Policy # *	H1567940	Estimated Taxes	
Effective Date *	12/19/2022	Full-Term Premium *	\$1,700.00
Expiration Date *	12/19/2023	Annual Premium *	\$1,700.00
Master Company *	Allstate	Total Commission	%
Writing Company	ALLSTATE INS CO	DEPARTMENT	
Billing Type *	Direct	Personal Lines (P/L)	
Rating State *	TX	SERVICE TEAM	
LOB Orig. Date	06/18/2021	EZLynx User (Producer)	20 %A \$0.00
Original Producer Code		EZLynx User (Producer)	5 %A \$0.00
Producer Code Override		Description	
Agency Code		Rewrite	

7 End





EZLynx - Sending an Email from EZLynx Using Email Templates

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure will show you how to send an email from within EZLynx using pre-built email templates for servicing tasks.

It is recommended to email from inside of EZLynx as much as possible in order to automatically attach your email correspondence to the system.

- 1 Click on Email Icon from Account in EZLynx



EZLynx

Search

Business Insurance Solutions, LLC

Type: Prospect/Lead
Since: 8/29/2023
Assigned Producer: Andrew Martin

Overview Policies Details

Account Overview

Policies (0) Applications (1)

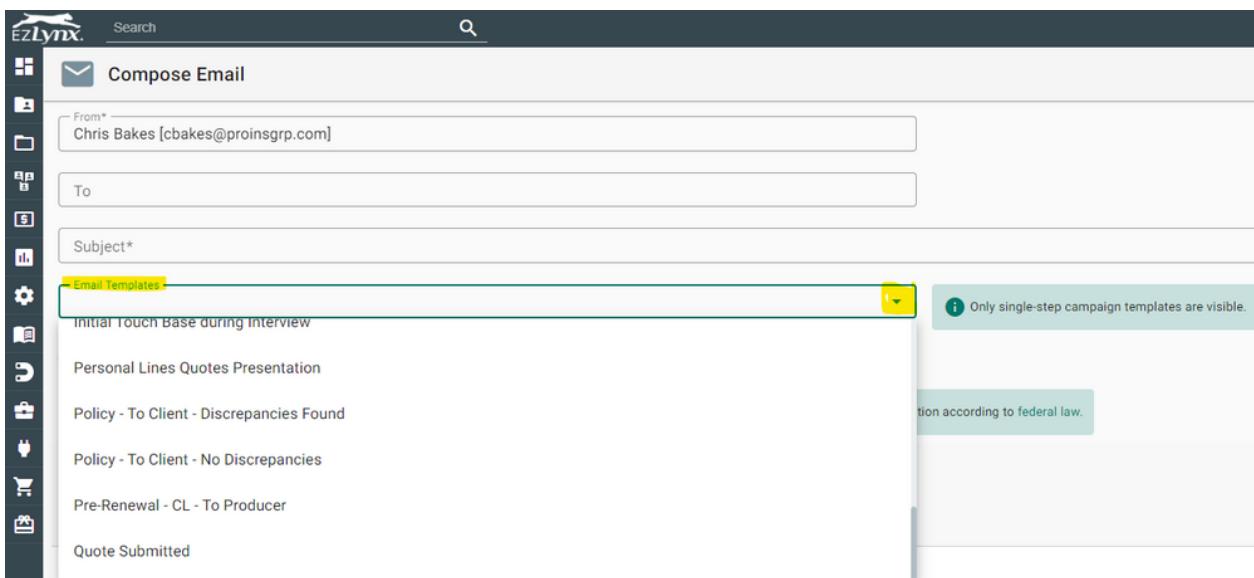
Genl Liability

Description: 23-24 GL - App

- 2 Select Email Template from Dropdown Menu



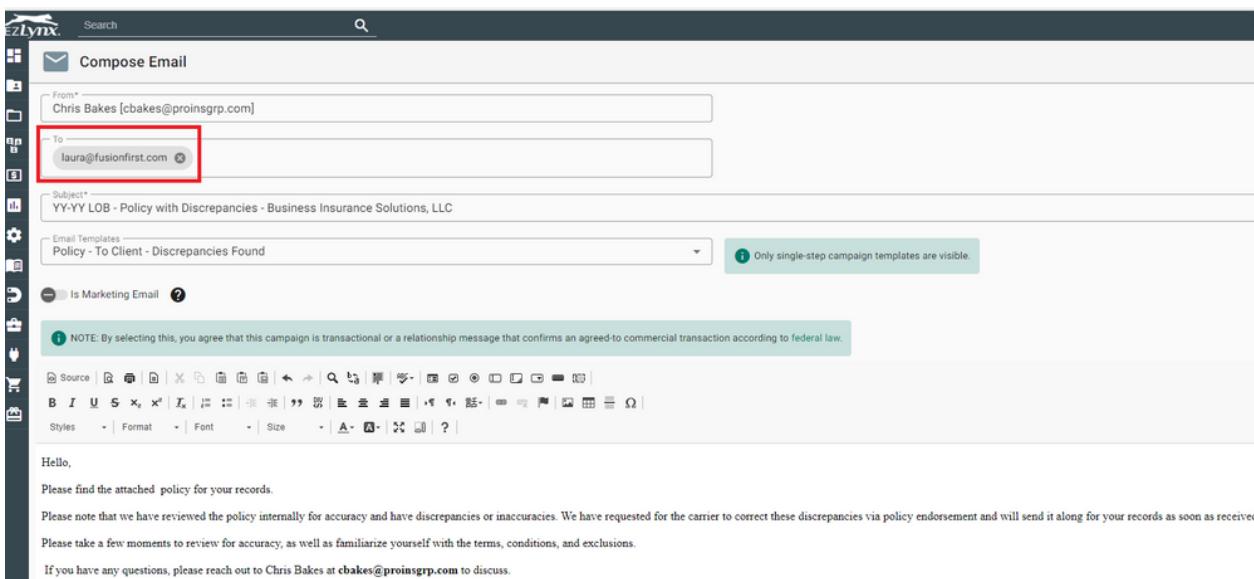
Each Template will pre-populate with text for body of email, but can also be edited if necessary.



3 Select or Type Email Address for Client

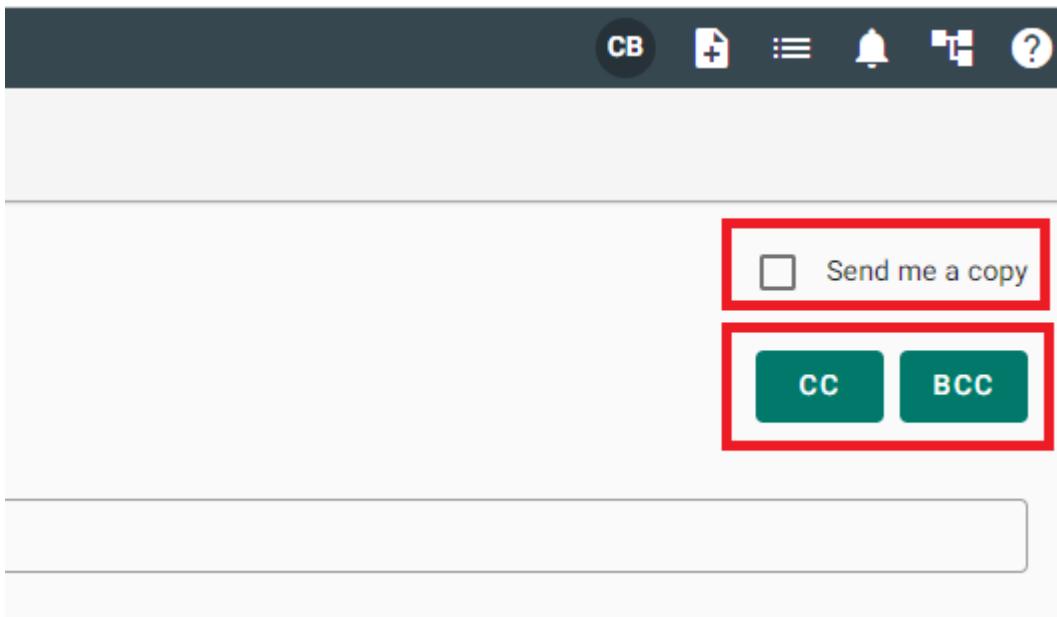


Note - If email address is missing from Client Details screen, it will not populate automatically.



4 CC, BCC, or Include a Copy to Yourself (if applicable)





5 Update Subject Line



A subject line will automatically populate, but will require updating according to agency naming conventions.

For example: Update "YY-YY LOB" to "23-24 GL"

A screenshot of the ezLynx 'Compose Email' screen. The interface includes a navigation bar with icons for Home, Search, and Logout. Below the bar, there is a title 'Compose Email'. The main area has fields for 'From' (Chris Bakes [cbakes@proinsgrp.com]), 'To' (laura@fusionfirst.com), and 'Subject' (YY-YY LOB - Policy with Discrepancies - Business Insurance Solutions, LLC). The 'To' and 'Subject' fields are both highlighted with red boxes. There are also sections for 'Email Templates' (Policy - To Client - Discrepancies Found) and a note about marketing emails. The bottom of the screen shows a rich text editor toolbar and a preview of the email body, which contains a greeting and a note about policy review.

6 Add Attachments



Click on "Paperclip" icon to add any documents you wish to include, such as a policy.

Hello,

Please find the attached policy for your records.

Please note that we have reviewed the policy internally for accuracy and have discrepancies or inaccuracies. We have requested for the carrier to correct these discrepancies via policy endorsement and will send it along for your review.

Please take a few moments to review for accuracy, as well as familiarize yourself with the terms, conditions, and exclusions.

If you have any questions, please reach out to Chris Bakes at cbakes@proinsgrp.com to discuss.

Thank you,

Chris Bakes
Pro Insurance Group LLC
2521 Technology Dr. Suite 201
Elgin, IL 60124
cbakes@proinsgrp.com
833-776-4671

 SEND

 CLOSE



7 Review for Accuracy and Send to Client



Review body of email for accuracy and to ensure all proper wording is included that you want to communicate to the client.

Hello,

Please find the attached policy for your records.

Please note that we have reviewed the policy internally for accuracy and have discrepancies or inaccuracies. We have requested

Please take a few moments to review for accuracy, as well as familiarize yourself with the terms, conditions, and exclusions.

If you have any questions, please reach out to Chris Bakes at cbakes@proinsgrp.com to discuss.

Thank you,

Chris Bakes
Pro Insurance Group LLC
2521 Technology Dr. Suite 201
Elgin, IL 60124
cbakes@proinsgrp.com
833-776-4671

 SEND

 CLOSE



8 Email Attaches to EZLynx



Once you hit send, your email will be automatically attached to the Activity screen in EZLynx.

You will notice the labeling of the Activity is the same as the Subject Line of the Email. Therefore, by using the proper naming conventions in the subject line, your email will automatically be labeled correctly.

The screenshot shows the 'Activity' tab selected in the top navigation bar. Below it, the 'Account Activity' section is displayed. It includes tabs for 'Notes' and 'System Log', a search bar, and a date filter. The main area shows activity logs categorized by 'TODAY' and 'YESTERDAY'. A specific email entry from '23-24 GL - Policy with Discrepancies - Business Insurance Solutions, LLC' to 'laura@fusionfirst.com' on 'Sep 25' is highlighted with a red box.

9 Manage the Activity (Optional)



If you would like to **Create a Follow-up Task**, **Link Email to Policy Header**, or **View Email**, you can do so by clicking on the Activity and the box will open with further options.

The detailed view of the email activity shows the full content of the message. The message is from '23-24 GL - Policy with Discrepancies - Business Insurance Solutions, LLC' to 'laura@fusionfirst.com'. The message body contains a greeting, a note about finding an attached policy, and a request for review. Action icons are available on the right, and a red box highlights the 'VIEW EMAIL' button at the bottom left of the message preview.

10 End





EZLynx - Compare and Create Policy Summary

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure can be used to quickly compare two policies in a customer's account in EZLynx to quickly identify changes made from an expiring to a renewal policy. This can be used as part of the pre-renewal process or at any time you wish to compare coverages and differences between two policies.

1 Pull up Client Account in EZLYnx



2 Locate Policy Header for Comparison



Find the policy you wish to compare from the client Overview screen.

Any pending renewals will be indicated on the policy header in purple

The screenshot shows the 'Overview' tab selected in the top navigation bar. Below it, the 'Account Overview' section displays two policy entries:

- Auto (Personal) | US282527823**
Encompass Insurance
Premium: \$1,327.00
Service Team: -
Term: 12/15/2022 to 12/15/2023
LOB Origination Date: 12/15/2019
Transaction Type: Renewal
Writing Company: ENCOMPASS HO...
Action icon: Three dots with a gear
- Personal pkg | US282527823**
1 LOBs included • Encompass Insurance
Premium: \$1,295.00
Service Team: -
Term: 12/15/2022 to 12/15/2023
LOB Origination Date: 12/15/2019
Renewal effective 12/15/2023
Transaction Type: Policy Change
Writing Company: ENCOMPASS HO...
Action icon: Three dots with a gear

3 Compare policy



1. Click on Action icon
2. Select Compare

Overview Policies Details Quotes Lead Info Documents Certificates Activity Invoices

Account Overview

Policies 4 **Applications** 0

MetLife Auto & Home®		Term: 10/27/2022 to 10/27/2023	Transaction Type: Renewal	Writing Company: ECONOMY PREF...
Premium: \$2,183.00	Service Team: -	LOB Origination Date: 10/27/2019		
Active Homeowners CH3145309850		Term: 10/27/2022 to 10/27/2023	Transaction Type: Renewal	Writing Company: Farmers Casual...
Premium: \$1,297.00	Service Team: -	LOB Origination Date: 10/27/2019		
13050 COVENTRY LN, HUNTLEY, IL 60142				
Active Homeowners 6129115176331		Term: 10/27/2022 to 10/27/2023	Transaction Type: DB Synch	Writing Company: TRAVC
Travelers	Premium: \$1,087.00	LOB Origination Date: 10/27/2022		
Renewal effective 10/27/2023				
13050 COVENTRY LN, HUNTLEY, IL 60142				
Auto (Personal) 6129115182031				

4 Confirm Policy Versions and Click Compare



Version 1 will be the renewal issued, as well as the date it was issued by the carrier.

Version 2 is the Latest Version of the policy, including any changes made throughout the policy term.

Confirm it is the correct policy and then click 'Compare'

Full Policy Details - Google Chrome
app.ezlynx.com/applicantportal/Applicant/142292009/PolicyDisplayAndCompare?Func=1&PolMasterID=m55788212

Policy Change Summary - 10/4/2023 3:12:21 PM

Insured Info Print

Named Insured(s):
BAKES, PATRICIA
200 HUNT CLUB DR
ST CHARLES, IL 60174

*To see the change summary between two policy versions, select each version you would like to compare then click the 'Compare' button.

Version 1: 10/01/2023 - RWL - \$1555.00 Version 2: PPKGE - Policy Number: US282527823 (Late) Compare

5 Review and Pdf Policy Summary



You can scroll down to review all changes made side-by-side, or you can click "Print" and create a pdf version to send to a Producer or Client if needed.

Policy Change Summary - 10/4/2023 3:12:21 PM

Insured Info

Named Insured(s):
BAKES, PATRICIA
200 HUNT CLUB DR
ST CHARLES, IL 60174

*To see the change summary between two policy versions, select each version you would like to compare then click the 'Compare' button.

Version 1:	10/01/2023 - RWL - \$1555.00	Version 2:	PPKGE - Policy Number: US282527823 (Late)	Compare
		Version 1	Version 2	
		10/01/2023 - RWL - \$1555.00	PPKGE - Policy Number: US282527823 (Latest)	

General Section

Insured Or Principal : Patricia Bakes

Insured Or Principal Role Code	Insured	Insured
Person Surname	Bakes	Bakes
Given Name	Patricia	Patricia
Legal Entity Code		IN
Tax Id : SSN	333489458	333489458
Address Type Code	StreetAddress	StreetAddress
Address 1	200 Hunt Club Dr #322	200 Hunt Club Dr #322
City	Saint Charles	Saint Charles
State Province Code	IL	IL
Postal Code	60174	60174
County	Kane	Kane

6 Distribute Summary or Attach to Client in EZLynx



7 End





EZLynx - Create Renewal Applications

Downloaded on – Dec. 9, 2024, 3:23 a.m.

PURPOSE:

The purpose of this procedure is to create efficiency and accuracy when beginning the application setup for renewals for commercial lines accounts. Applications should be created for each upcoming renewal for the purposes of entering updated client information or changes to exposures during the pre-renewal process, submitting applications to underwriters for marketing purposes, and to later convert into a policy at renewal if the policy has been rewritten or does not automatically download.

JOB ROLE/RESPONSIBILITY: ACCOUNT MANAGER/CSR

1 Go to Customer Account in EZLynx

2 Locate Policy Header Renewing and Create Application

From Account Overview Screen:

1. Click on Actions icon (three dots)
2. Select 'Service'
3. Select 'Create Application'

The screenshot shows the 'Account Overview' page with a list of policies. A context menu is open over the third policy in the list, specifically for the 'Workers comp | 6025379919' entry. The menu items are: Compare, Edit, Service (highlighted with a red box), Other, Audit, Cancel, Change, Change Request, Create Application (highlighted with a red dashed box), Export Policy Information, and Renew.

Status	Description	Premium	Term	LOB	Transaction Type	Origination Date
Active	Business Owners Policy 6025379712	CNA \$2,917.00	10/15/2022 to 10/15/2023		Renewal	10/15/2023
Active	Workers comp 6025379919	CNA \$1,315.00	10/15/2022 to 10/15/2023		Policy C	10/15/2023
Active	Umbrella - Comm 6025379922	CNA \$1,212.00	10/15/2022 to 10/15/2023		Renewal	10/15/2019
Inactive	Auto (Commercial) 10040531CA	State Auto Insurance \$2,520.00	9/26/2022 to 9/26/2023		Renewal	9/26/2020
Inactive	Genl Liability 7012897261	CNA				

3 Add Commercial Application



The Line of Business and Policy information will automatically populate, but can be changed in the event of an error.

1. Enter a description using the approved naming conventions: YY-YY LOB - Application
2. Click 'Add Application'

Add Commercial Application

Commercial Personal

Line Of Business **Application/Policy To Pre-Fill From**

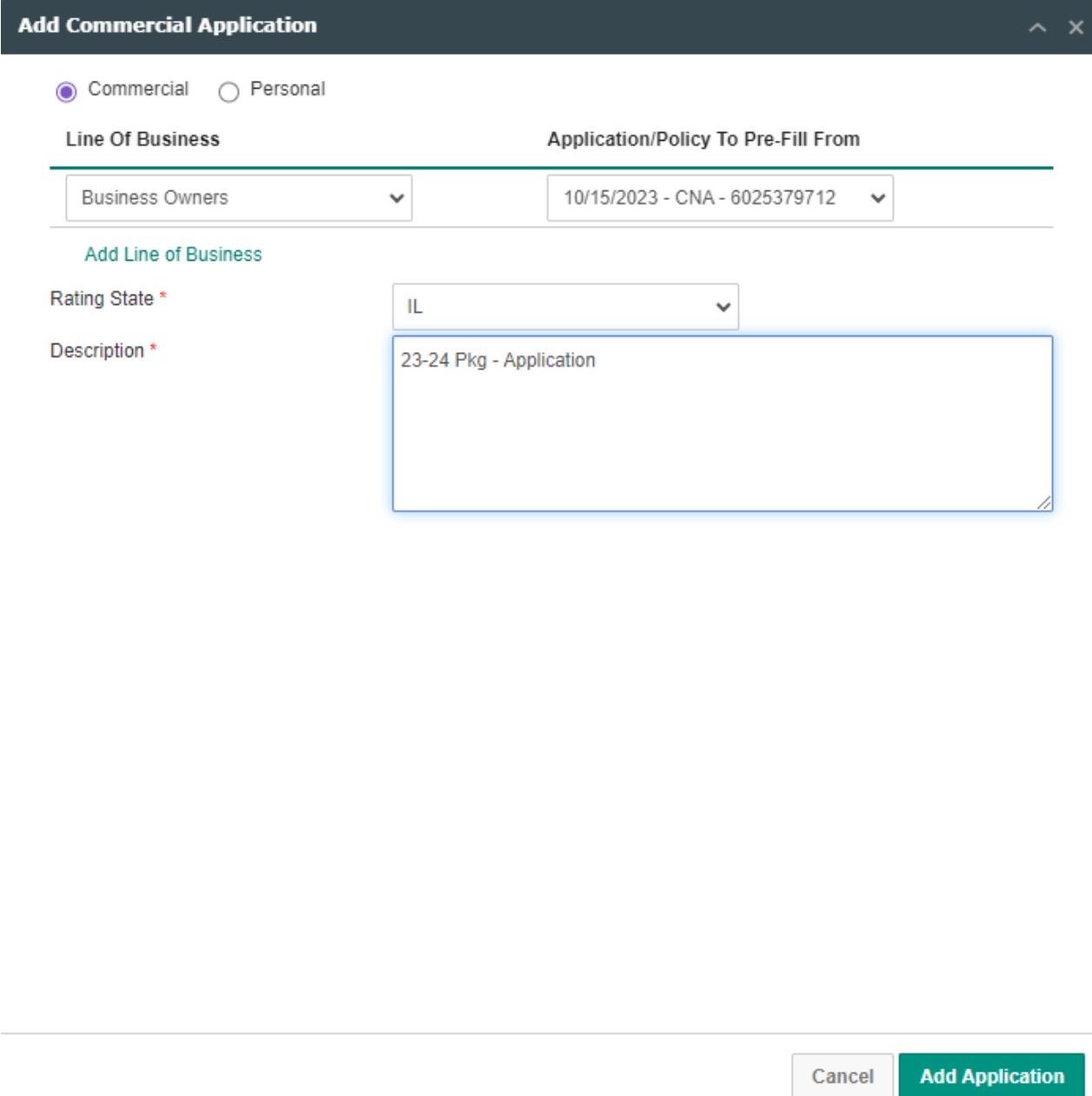
Business Owners	10/15/2023 - CNA - 6025379712
-----------------	-------------------------------

[Add Line of Business](#)

Rating State * IL

Description * 23-24 Pkg - Application

[Cancel](#) **Add Application**



4 Review, Enter or Update Application Tabs



1. Click and Review each tab at the top, making sure all fields are completed as much as possible..

2.

Save & Close Cancel < Previous Next >

Insured Information Business Owners Underwriting Additional Interest / Policy Contacts

First Named Insured

Insured Name: INAVISTA SOLUTIONS INC. Country: United States

Address 1: 1477 COMMERCE DR Address 2:

City: ALGONQUIN State: IL Zip: 60102 Validate

Website Address: Business Phone Number: (847) 397-9795 Entity Type: Corporation

Business Fax Number: Primary Email Address: Secondary Email Address: Applicant's Title:

Make sure to expand all sections to answer questions or complete missing information

Prior Carrier Information



Loss History



Business Owners Policy - General Information Questions



Commercial Applicant Questions (ACORD 125)



General Questions (ACORD 125 and 825)



ACORD 125 - Remarks / Processing Instructions (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

BUSINESS INCOME 12 MONTHS ACTUAL LOSS SUSTAINED FULL PAY

5 Add Additional Interests and Inspection Contacts



1. Add any Additional Insureds such as Landlords, Mortgagees or others that may require a scheduled endorsement. This will also help to populate COI's
2. Populate Inspection Contacts and Accounting Contacts. This is for carrier inspection and/or final audit purposes, as applicable.
3. Click 'Save and Close'

Save & Close Cancel < Previous Next >

Insured Information Business Owners Underwriting Additional Interest / Policy Contacts

Additional Interests

Name	Address 1	Address 2	City	State	Zip	Line of Business	Interest Type	Location #	Building #	Add Additional Interest	Import Additional Interest
										Add Additional Interest	

Policy Contacts

Contact Type	Name	Phone Type	Primary Phone	Phone Type	Secondary Phone	Primary Email Address	Secondary Email Address

Add Contact

Save & Close Cancel < Previous Next >

6 Create Application



You can now generate your Acord applications for submission to underwriters or to send to producer.

From Account Overview screen

1. Click 'Applications' tab
2. Click Forms icon
3. Click Acord Applications

Account Overview

Policies Applications Tasks

Business Owners Policy Description: 23-24 Pkg - Application Last Modified: 10/10/2023

ACORD Applications

Agent/Broker of Record Change (ACO...)
Statement Of No Loss (ACORD 37)
Agency Forms
View All Forms

7 End





EZLynx - Client Center

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This tutorial covers the basics in understanding the Client Center, which is available to any Active client within EZLynx with at least one active policy. .

Client Center increases efficiency to the agency and satisfaction of experience to the client.

Client Center Capabilities include:

1. Auto ID Cards
2. Issuing Certificates - **See Steps Below.. Needs to be enabled on each individual client account.**
3. Reviewing policy information
4. Request Policy Changes - **See Steps Below. Must still be processed with carrier**
5. Direct Bill Payments - Great when needing to send reminder notices for past due payments.
6. Upload Documents

Client Center link can be sent to a client at any time to access documents or perform any of the above mentioned actions.

[EZLynx - Client Center Tutorial](#)

1 Share Client Center Link



The Client Center Link can be sent through automation in binding new business, at time of renewal, or email campaigns.

***Currently, this link is sent to any new business client after an account has become active.**

You can manually send the link by clicking the "Share" icon and choose whether to send the link by Text or Email to the client.

The client will receive the link be asked to input their email address and zip code for verification purposes vs creating credentials.

The screenshot shows a client profile interface. At the top, there's a toolbar with icons for star, envelope, message, file, user, briefcase, and share. To the right, a sidebar shows 'Policies' with a count of 0. Below the toolbar, the client's details are listed: Type: Prospective, Since: 8/29/2020, Assigned Prod: Martin, CSR: Andrew M., Agency: Pro In LLC. A dropdown menu is open over the 'Client Center Link via Text' and 'Client Center Link via Email' fields, both of which are highlighted in yellow. The address section shows 22961 W LONG GROVE RD, DEER PARK, IL 60010, with links to Map and Zillow.

Type: Prospective
Since: 8/29/2020
Assigned Prod: Martin
CSR: Andrew M.
Agency: Pro In LLC

Address
22961 W LONG GROVE RD
DEER PARK, IL 60010
Map Zillow

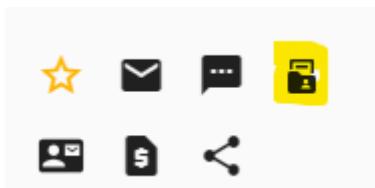
Personal URL (PURL)
Client Center Link via Text
Client Center Link via Email

Policies
0

2 View Client Center



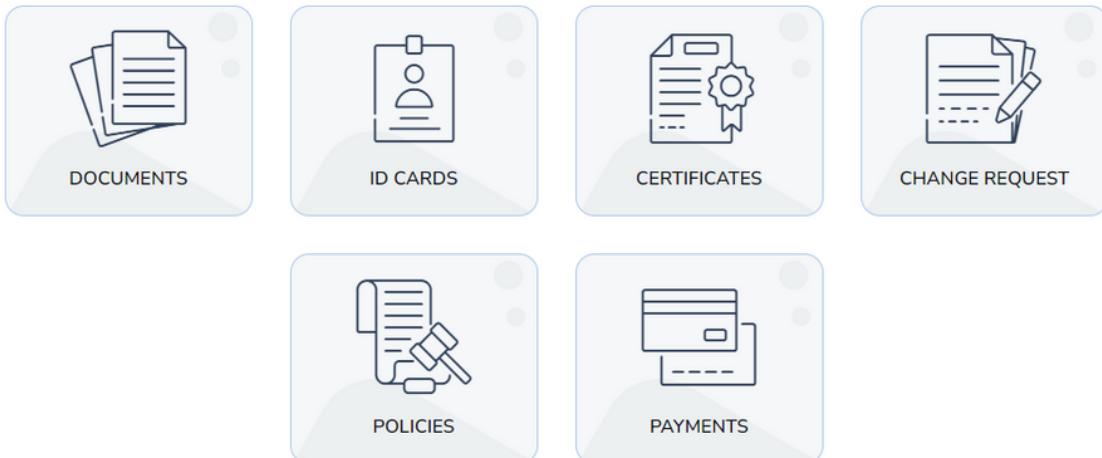
You can view Client Center in a 'Read Only' mode to view what the client can see by clicking on the Client Center icon



Welcome

Thanks for being a loyal customer

How can we help you today?



3 Auto ID Cards



Clients can access their Auto ID Cards through Client Center.

You can also set up automations for Auto ID Cards to automatically be sent to clients when an Auto policy renews in EZLynx by enabling in the Automation Center.

Note: This has already been set up for Personal Lines Renewals.

4 Certificates



Clients can have access to their Certificates of Insurance that have already been issued, or create their own certificates through Client Center under the following conditions:

- 1.) Master Certificate Set has already been created
- 2.) Certificates have been issued
- 3.) They can create new certificates, but cannot add special wording or endorsements
- 4.) **They can only obtain certificates if Access has been enabled from the client account. This must be done for each client individually by following the steps below. Access is not automatically given.**

1. Go to Client Account
2. Click on 'Certificates' tab
3. Click green 'Actions' button
4. Select 'Client Center'

Submissions Quotes Lead Info Documents Certificates Activity Invoices Notifications

Master Certificate of Liability Insurance 23-24

Policies	View 2 Policies	ACTIONS
Active Workers comp ARP12001852904 Accident Fund insurance Company of America Premium: \$1,734.00 Term: 3/15/2023 to 3/15/2024 Service Team: - Billing Type: Direct Producer Code: Original: N/A - ...	Total Commission:	Client Center
Active Commercial Pkg B398543 18 West Bend Mutual Insurance Company Premium: \$11,561.00 Term: 7/2/2023 to 7/2/2024 Service Team: - Billing Type: Direct Producer Code: -	Total Commission:	Delete Master

Certificate Holders

- e. Click 'Enabled'
- f. Check Acknowledgement Box
- g. Click 'Save'

[Actions](#) ▾

MA

[Client Center](#)[Delete Master](#)[Distribution Report](#)[Edit Master](#)[Export Holders](#)[Preview Master](#)

Enable Client Center Certificate Self-Generation

Are you sure this Certificate is fully and accurately filled out?

By enabling Client Center Certificate Self-Generation, you can allow your insured to add Certificate Holders and generate new Certificates using this Certificate Master. This means that it is essential that you review this Certificate Master and ensure that everything is accurate. The insured will not be able to change anything in the Certificate other than the Certificate Holder details.

Client Center Certificate Self-Generation

Enabled Disabled

Yes, I understand that it is my responsibility to ensure that everything in this Certificate Master is accurate. I also understand that by enabling this feature I am giving my Insured the ability to add additional Certificate Holders and generate new Certificates using this Certificate Master as a template.

[CANCEL](#) [SAVE](#)



5 Endorsement Requests

Clients can request changes to their policy through the Client Center.

Please note that this only creates a Change Request transaction on the policy header and sends notification in EZLynx to the assigned Producer and CSR of the requested change.

*The Endorsement must still be requested and processed with the carrier.

See Procedure: [Endorsement Request - Client Center - \(AM/CSR\)](#)

6 Review policy information



Clients can view the policy information as it is downloaded or entered in EZLynx. Therefore, it is important to keep the policy headers updated.

Note: This information is "Read Only". They cannot download the physical policy or share the information.

7 Direct Bill Payments to Carrier



Clients can make payments to their carrier through the Client Center, assuming the carrier they are insured with has a portal that accepts payments online.

Sending a copy of the Client Center link when notice of past due payment or non-payment is received is a great time saver for agent and client.

8 Upload/Download Documents



Clients can upload updated underwriting information securely through the portal., The producer and csr will be notified and the document will attach to the client account in EZLynx.

Clients can also download issued Auto ID Cards and Certificates from this tab.



EZLynx - Retention Center: Actions

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This tutorial will help you understand how to quickly perform an action from within the Retention Center vs having to navigate to the client account. Retention Center is used as a tool to manage your renewals from within EZLynx. You can view carrier renewals that have downloaded or you can view your upcoming expiration list. You can manage your renewals by including updates as you go along without having to go to the customer account.

Inside the Retention Center, you can:

1. Create a Note or Task (Checklists)
2. Close a Renewal
3. Send an Email to Client

Click Here for tutorial [EZLynx - Retention Center Actions](#)

1 Creating a Note or Task



- 1.) Navigate to Retention Center
- 2.) Click on box next to insured you want to add an Account Note or Task checklist for
- 3.) Click on green 'Actions' button
- 4.) Select Add Note or Task from Dropdown

Retention Center / Overview

Patented

Insured Name	Renewals (90 Days)	Renewal Date	Total Change%	Risk	Quoted	Status
Kierra Flores	1 of 1	September 20, 2023	30%	High		Pending
Keira Hudson	1 of 1	September 22, 2023	18%	High		Pending

2 Send Email Campaign



You can schedule an email campaign or send email to client utilizing a template created within EZLynx. You do not want to use this feature to send a customized email

- 1.) Navigate to Retention Center
- 2.) Click on box next to insured you want to add an Account Note or Task checklist for
- 3.) Click on green 'Actions' button
- 4.) Select Create Email Campaign from dropdown

Retention Center / Overview

Patented

Insured Name	Renewals (90 Days)	Renewal Date	Total Change%	Risk	Quoted	Status
Kierra Flores	1 of 1	September 20, 2023	30%	High	--	<input type="button" value="Send Email Campaign"/>
Keira Hudson	1 of 1	September 22, 2023	18%	High	--	

3 Close a Renewal



Closing out a renewal only removes it from Retention Center. You can close out a renewal if you know for 100% certain that account has been renewed with no further actions needed.

Please note you cannot undo this Action.



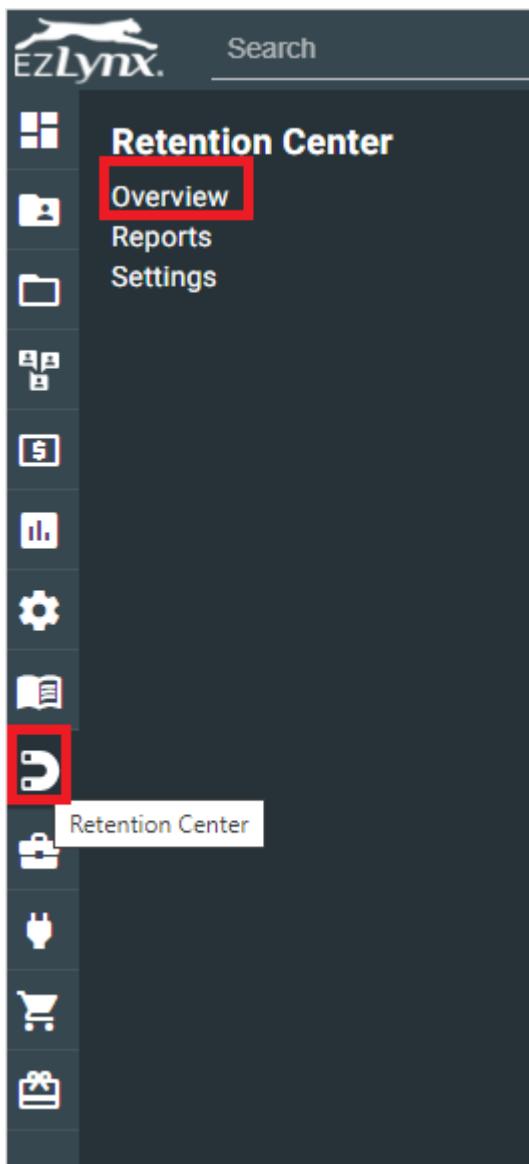
EZLynx - Retention Center: Create Difference Report

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure can be used to easily view and compare differences in coverages and premiums from an expiring policy vs a renewal policy.

You can create these quick summaries from EZLynx and use as part of a renewal review process or to be able to quickly answer questions regarding changes made to an insured's renewal.

1 Go to Client Retention Center



2 Locate Client on Renewal List



If carrier has issued renewal terms that have been downloaded into EZLynx, the client will show up on the "Renewal List" in Retention Center.

Click on the space next to client name to expand and review renewal terms issued

You can quickly see any % or amount of change to client premium.

The screenshot shows the EZLynx software interface. At the top, there is a search bar labeled "Search Insured's". Below it, three tabs are visible: "RENEWAL LIST (9 Policies)" (selected), "EXPIRATION LIST (31 Policies)", and "EXPIRED LIST (40 Policies)". A table below the tabs lists policies, with one row expanded for "Clement Schmitt". The expanded row includes columns for Insured Name, Renewals (30 Days), Renewal Date, Total Change%, Risk, Quoted Status, Day(s), and Agency. The "Agency" column shows "Pro Insurance Group LLC". Below the table, a message indicates "Assigned Producer :Neal Fusco / Since: 09/07/18 / State: Illinois / Total Active Policies: 4 / Total Active Policy Amount: \$5,744.00". Two sections of the software are shown side-by-side: "AUTO (PERSONAL) - 6129115182031" and "HOMEOWNERS - 6129115176331". Each section displays policy details like Carrier, Premium, Effective Date, Expiration, Days to Expiration, LOB Origination, Written Premium, Full-Term Premium, Annualized Premium, Rating State, Last Quoted Date, Download Received, and Change Reasons. In the "DIFFERENCE REPORT" section for the AUTO policy, two buttons are highlighted: "Vehicles- Modified" and "Coverages- Modified".

3 Create Difference Report



In order to review and compare all changes made from a client's existing policy vs renewal terms offered, click 'DIFFERENCE REPORT' to generate a summary of all changes to client coverages and premiums.

All Changes will be highlighted in Yellow

DIFFERENCE REPORT

Illinois

08/19/23

Vehicles- Modified

Coverages- Modified

4 Print PDF of Difference Report



Click on 'Print' to create a pdf copy of Difference Report to send to Producer, Client or Attach in EZLynx

Compare Policy 6129115182031

Policy Change Summary - 10/4/2023 2:59:41 PM

Insured Info			
Named Insured(s): SCHMITT, CLEMENT 13050 COVENTRY LN HUNTERLY, IL 60142		<input type="button" value="Print"/>	
Version 1: 08/19/2023 - RWL - \$1381.00		Version 2: 08/19/2023 - SYN - \$1177.00	
General Section		General Section	
General Policy Details 1		General Policy Details 1	
Current Term Amount 1381.00		1177.00	
Full Term Amount 1381.00		1177.00	
Net Change Amount 1381.00			
Effective Date 2023-10-27		2022-10-27	
Expiration Date 2024-10-27		2023-10-27	
Original Inception Date 2023-10-27		2022-10-27	
Rate Effective Date 2023-08-18		2022-09-27	
Other Or Prior Policy 9999999996331 Info			
Policy Code Other		9999999996331	
Policy Number 6129115176331			
Other Or Prior Policy 6129115176331 Info			
Policy Code Other			
Policy Number 6129115176331			
Line Of Business Info			
Current Term Amount 1381.00		1177.00	
Net Change Amount 1381.00			
Rate Effective Date 2023-08-18		2022-09-27	
Remark Section			

5 Distribute Report and/or Attach in EZLynx



From here, you can email the report to the Producer as part of the pre-renewal process, send to client if they requested, or simply attach to client account in EZLynx as a future reference.

EZLynx - Converting an Application to a Policy

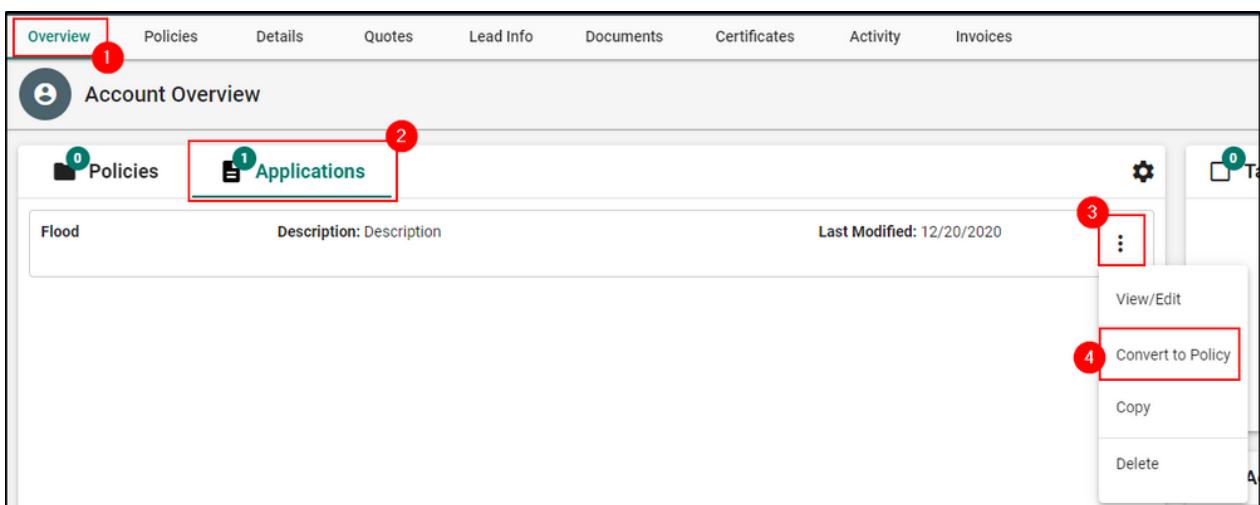
Downloaded on – Dec. 9, 2024, 3:23 a.m.

This tutorial shows agents how to create a policy from a manual application in EZLynx. An agent will typically need to convert to a policy, when a carrier does not support downloading for the sold line of business. When you have a completed application, there is no need to manually enter in all policy data. This workflow saves time by transferring all existing coverages in an application, into a new policy.

1 Convert Application to Policy



1. Click the Customer's **Overview** tab
2. Click the **Applications** tab.
3. Click the **More Actions Icon**.
4. Then click **Convert to Policy**.



2 Complete Policy Information fields



1. Enter Policy Number
2. Choose Effective Date
3. Choose correct carrier u/w company
4. Specify Direct Bill vs Agency Bill
5. Complete Premium and Commission
6. Add Policy Description
- 7.

Add Policy

POLICY INFO

- Package
- Monoline

Line of Business *

Transaction Type *

Please enter policy # exactly as it appears on the policy on the carrier's site. A duplicate policy could be created if entered incorrectly.

Policy # *

Effective Date *

Expiration Date *

Master Company *

Writing Company

Billing Type *

Rating State *

LOB Orig. Date

Original Producer Code

Producer Code Override

Agency Code

PREMIUM & ADDITIONAL CHARGES

Written Premium *	<input type="text"/>
Estimated Fees	<input type="text"/>
Estimated Taxes	<input type="text"/>
Full-Term Premium *	<input type="text"/>
Annual Premium *	<input type="text"/>
Total Commission	<input type="text"/> %

DEPARTMENT

SERVICE TEAM

No rule matches

Description

3 Review/Complete Policy LOB and U/W Info (if applicable)

Applications, including all underwriting information used for quoting process should be included on policy screens if initially completed during application process. Review and update all coverages as bound, including limits, deductibles, and special endorsements

Click "SAVE"

Flood

4 End



EZLynx - Adding Master Carrier or Underwriting Companies (Admin)

Downloaded on – Dec. 9, 2024, 3:23 a.m.

the below is a tutorial on how to add Master Carrier and Underwriting Companies in EZLynx. This should be followed whenever a Master Carrier or Underwriting Company is not available as an option on the policy header. It is important that the proper Master Carrier and Underwriting companies on a policy header match exactly as the policy has been issued for accuracy and output purposes such as Certificates of Insurance.

Click here to view short video for adding master carriers or underwriting companies in EZLynx.

[EZLynx - Adding Master Carrier or Underwriting Companies](#)

1 Go to Manage Carriers/Markets



From EZLynx Home Dashboard:

1. Click in Setting Icon
2. Click on Manage Carriers/Markets

2 Add New Master Carrier/Company



Click on "Add New Master Company" Icon

3 Add Master Carrier



1. Type in Name of Master Carrier name you wish to add
2. Click Search
3. Select Carrier

Add a New Master Company

X

Step 1 - Search for a Master Company. If the company you want is not found, you will be able to add a custom company.

Search

Name	Supported?
Berkley Ins. Co.	Supported by EZLynx
Berkley Regional Specialty Insurance Co	Supported by EZLynx
View additional known carriers	

4 Add Underwriting Companies with NAIC



1. Check Box to 'Select All' available underwriting companies under the Master Company name. This will pull over and activate all available underwriting companies for that carrier.,
2. Click Save

Add a New Master Company

X

Step 2 - Add Writing Companies to the Master Company by entering the company name or NAIC code in the search box below.

Berkley Ins. Co.

Reset

Search for Writing Company by name or NAIC code

Search

Select writing companies from the list below: Select All

BERYL AMER CORP - 10547

Selected writing companies:

BERYL AMER CORP - 10547

X

Cancel

Save

5 Repeat Steps for all Carriers



Repeat steps as many times as necessary to add more carriers.

6 Adding Carrier or Wholesaler with No Listed U/W Company



If you have a Carrier who comes up when you search, but there are no corresponding underwriting companies shown for that carrier in order to save or add, you must manually type in the name of the underwriting company in the search field and it will populate.

Note, all wholesalers/brokers will need to be added as a Master Carrier, and then follow the same step of manually typing in the underwriting company for the active policy under that wholesaler/broker to add.

See Video here: [EZLynx - Adding Wholesler/Brokers or Carriers w/o UW co...](#)

7

End



EZLynx - Outlook Add-In

Downloaded on – Dec. 9, 2024, 3:23 a.m.

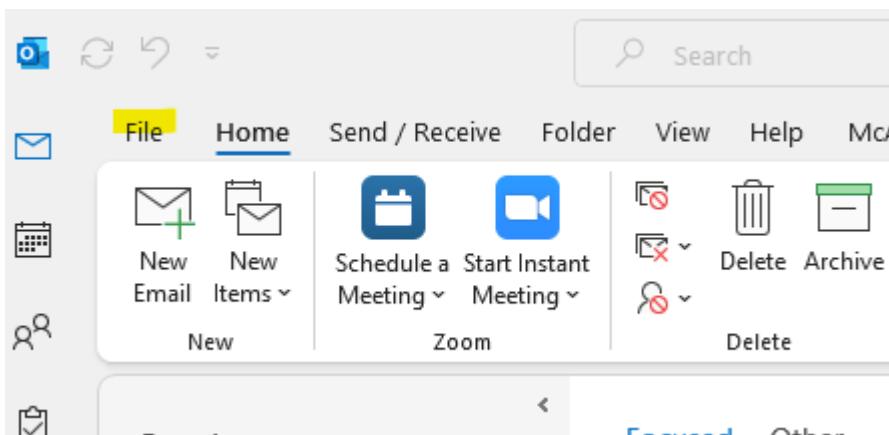
Each user should have the EZLynx Add-In feature installed within their Outlook in order to maximize efficiency when attaching and labeling documents and correspondence to a client or prospect account in EZLynx.

1 Configuring the EZLynx Outlook Add-In



Launch Microsoft Outlook on your computer.

Click on "File" in upper left-hand corner



Click on 'EZLynx' in the add-ins list.

Enter your EZLynx login credentials and click 'Log In'.

Once logged in, choose the desired settings for the add-in and click 'Save' to apply the changes.

2 Click on "Manage Add-Ins"



Click "Manage Add-ins"

The screenshot shows the Microsoft Outlook ribbon with the 'File' tab selected. On the left, there is a vertical sidebar with several options:

- Automatic Replies**: Shows a purple envelope icon and the text "Automatic Replies".
- Tools**: Shows a gear and wrench icon and the text "Tools".
- Manage Rules & Alerts**: Shows a gear and bell icon and the text "Manage Rules & Alerts".
- Manage COM Add-ins**: Shows a gear and square icon and the text "Manage COM Add-ins".
- Manage Add-ins**: Shows a globe and gear icon and the text "Manage Add-ins". This option is highlighted with a yellow box.

On the right, the main pane displays the following sections:

- Automatic Replies (Out of Office)**: Text: "Use automatic replies to notify others that you are out of office, or not available to respond to email messages."
- Mailbox Settings**: Text: "Manage the size of your mailbox by emptying Deleted Items and a". Below it is a progress bar with the text "■ 47.8 GB free of 49.5 GB".
- Rules and Alerts**: Text: "Use Rules and Alerts to help organize your incoming email messages. Updates when items are added, changed, or removed."
- Slow and Disabled COM Add-ins**: Text: "Manage COM add-ins that are affecting your Outlook experience."
- Manage Add-ins**: Text: "Manage and acquire Web Add-ins for Outlook."

3 Using the EZLynx Outlook Add-In



Compose or open an email in Microsoft Outlook.

In the 'Add-Ins' tab, click on 'EZLynx'.

A sidebar will appear on the right-hand side.

Use the available options and features in the sidebar to interact with EZLynx directly from Outlook, such as accessing customer information, sending quotes, or viewing policy details.

After using the add-in, click 'Close' on the sidebar to minimize it.

4 Enter your Outlook Credentials



Outlook will open in your browser and ask for your log-in credentials. Enter them.

5 Search for EZLynx for Outlook and Click Install

The screenshot shows the Microsoft Add-Ins for Outlook page. At the top, there is a search bar with the text "EZLynx". Below the search bar, the results are displayed. The first result is "EZLynx for Outlook", which is highlighted with a yellow box. The "Add" button for this item is also highlighted with a yellow box. Other results include "Tasks in a Box for Outlook", "Priority Matrix: Turn emails into tasks", "Revenue Grid for Salesforce CRM", "Trustifi for Outlook – Secure and Productive", and "Leave Request for Outlook". Each result card includes a brief description, a star rating, and an "Add" button.

6 Close and Restart Outlook

7 EZLynx Add-In Will Display in Outlook

The screenshot shows the Outlook ribbon. The "EZLynx" icon is highlighted with a yellow box. The ribbon tabs visible are Tags, Groups, Search People, Address Book, Filter Email, Read Aloud, Speech, Translate, Language, Get Add-ins, Add-ins, Reply with Scheduling Poll, Find Time, Attach to Epic, EZLynx, and Viva Insights. The "EZLynx" tab is currently selected. The status bar at the bottom shows icons for smiley face, reply, reply all, forward, and more.

8 End





EZLynx - Creating a New Prospect - Personal Lines

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure should be used whenever creating a new applicant for personal lines inside of EZLynx.

If Personal Lines Applicant form was submitted through HubSpot, EZLynx Applicant will automatically be created and will just need to be checked for additional details to be added.

If New Business Quote Request word document was completed, the Applicant will need to be manually created. See steps below or Click here for Training Video: [PL - Create New Prospect in EZLynx](#)

1 New Prospect Information Received

If New Prospect information is emailed via new business request word document by Producer, you will need to enter in the Prospect manually.

2 Manually Enter or Update Fields

*It is possible not all fields will transfer from HubSpot. Review Applicant "Details" tab in EZLynx and manually enter or update the following fields as necessary:

1. First and Last Name
2. Address State
3. Postal Code
4. Gender
5. DOB
6. Marital Status
7. Education
8. Industry of Work
9. Occupation (Department or Job Title)
10. Years (in current occupation)
11. Applicant type: Select PROSPECT/LEAD
12. Customer Since: Date will default to day you are inputting the prospect into EZLynx. However, you can change this if needed.
13. Primary Address
14. Email Address
15. Mobile Phone Number

16. Co-Applicant Information (If Applicable)

3 Confirm Applicant Type reflects Prospect/Lead

This field must be populated as Prospect/Lead or the next workflow will not automatically trigger in EZLynx

4 Assign Producer and CSR

Assign Producer:

1. Click on team members Icon for dropdown
2. Select "Users" and choose appropriate name for Producer. This should be the person responsible for bringing in the new prospect and considered to be the primary person of contact for the client

Assign CSR:

1. Click on team members Icon for dropdown
2. Select "Users" and choose appropriate name for CSR. This should be the person responsible for quoting and daily servicing of the account.

5 Click "SAVE"

6 End



EZLynx - Creating a new prospect - Commercial Lines

Downloaded on – Dec. 9, 2024, 3:23 a.m.

This procedure should be used whenever creating a new applicant for commercial lines inside of EZLynx.

If New Business Quote Request word document was completed, the Applicant will need to be manually created. See steps below or Click here for Training Video [EZLynx - Create Commercial Prospect/Applicant](#)

1 New Prospect Information Received

Producer sends information or policies for new prospect to be entered in EZLynx in order to begin the quoting process.

2 Review or Complete fields for Applicant Info

Click on "Details" Tab

Any information entered here will pre-fill on future applications within the system or be used for quoting purposes.

Most information will be populated from HubSpot Submission form, however, you not all information will transfer and will need to be manually updated.

Update or Manually enter the following fields:

1. Business Name
2. Email
3. Website URL
4. Legal Entity Type
5. EIN
6. Address State
7. Account Type: **MUST REFLECT PROSPECT/LEAD**
8. Date Business Started (If only number of years, select January 1st of that year)
9. NAICS (Perform Search based on Description of Business)
10. Description of Operations
11. Primary Address
12. Customer Since: Date will default to day you are inputting the prospect into EZLynx. However, you can change this if needed.
13. Primary Address

14. Contact Name, Email and Phone Number.

3 Confirm Applicant Type reflects Prospect/Lead

This field must be populated as Prospect/Lead or the next workflow will not automatically trigger in EZLynx

4 Assign Correct Producer and CSR

Assign Producer:

1. Click on team members Icon for dropdown
2. Select "Users" and choose appropriate name for Producer. This should be the person responsible for bringing in the new prospect and considered to be the primary person of contact for the client

Assign CSR:

1. Click on team members Icon for dropdown
2. Select "Users" and choose appropriate name for CSR. This should be the person responsible for quoting and daily servicing of the account.

Next step 5: Click "SAVE"

5 Click "SAVE"

6 End



EZLynx - User Interface Basics

Downloaded on – Dec. 9, 2024, 3:22 a.m.

The 4th and last step for completing the onboarding basics for EZLynx is learning how to use the interface, view data, and understand the action buttons.

Click Here to view video: [EZLynx - User Interface Basics](#)

1 Access EZLynx 4



To access EZLynx 4, open your preferred web browser and enter the URL: ezlynx.com.

Next, enter your login credentials (username and password) and click on the 'Login' button.

2 Navigate the Dashboard



After logging in, you will be taken to the EZLynx 4 Dashboard. This is the main interface where you can access various features and information.

On the Dashboard, you will see different modules such as Pipeline, Birthdays, Calendar, and more. Use the navigation menu on the left-hand side to switch between different sections and modules.

3 Customize the User Interface



EZLynx 4 allows you to customize the User Interface to suit your preferences. Follow these steps to customize the UI:

1. Click on the profile picture at the top right corner of the screen.
2. From the drop-down menu, select 'User Settings'.
3. In the 'User Settings' window, navigate to the 'User Interface' tab.
4. Here, you can modify various settings such as the color theme, sidebar position, and module layout.
5. Once you have made your desired changes, click on the 'Save' button to apply the changes to your User Interface.

4 Use the Search Feature



The User Interface of EZLynx 4 includes a powerful search feature to help you quickly find what you need. Follow these steps to use the search feature:

1. Locate the search bar at the top of the screen.
2. Type in your search query, which can include policyholder names, policy numbers, addresses, and more.
3. As you type, the search results will populate below the search bar.
4. Click on the desired search result to access detailed information.
5. Use the filtering options on the left-hand side to narrow down your search results even further.

5 Access Help and Support



If you encounter any issues or have questions while using EZLynx 4, you can access the Help and Support resources available. Follow these steps to access Help and Support:

1. Click on the question mark icon (?) located at the top right corner of the screen.
2. In the drop-down menu, select 'Help' to access the Help documentation.
3. In the same drop-down menu, you can also select 'Support' to get assistance from the EZLynx Support team via phone or email.

6 End





EZLynx - Navigating the Toolbars

Downloaded on – Dec. 9, 2024, 3:22 a.m.

The 3rd step into onboarding for EZLynx is understanding how to Navigate the EZLynx toolbars.

Click here to view video: [EZLynx - Navigating Toolbars](#)

1 Accessing the Toolbar



To access the toolbars in EZLynx 3, follow these steps:

1. Launch EZLynx 3 by clicking on the EZLynx icon on your desktop or by navigating to the EZLynx website and logging in with your credentials.
2. After logging in, you will be directed to the EZLynx main dashboard.
3. The toolbars are located at the top of the screen, just below the main navigation menu.

2 Understanding the Main Toolbar



The main toolbar in EZLynx 3 provides access to essential functions and features. Here's a breakdown of each button:

- **Home:** Returns to the EZLynx main dashboard.
- **Clients:** Allows you to manage client information and policies.
- **Policies:** Gives you access to policy details, documents, and endorsements.
- **Applications:** Allows you to view and manage applications for new policies or quotes.
- **Activities:** Provides a centralized location for tasks, events, and notes.
- **Reports:** Allows you to generate various reports for analysis and tracking.
- **Settings:** Gives you access to system and user settings.

3 Exploring the Quick Access Toolbar



The quick access toolbar in EZLynx 3 provides instant access to frequently used functions and features. Here's how to make the most of it:

1. You can customize the quick access toolbar by clicking the 'Customize Quick Access Toolbar' button at the end of the toolbar.

2. Select the desired functions from the dropdown menu and click 'Add' to add them to the toolbar, or click 'Remove' to remove existing functions.
3. The order of the functions on the toolbar can be rearranged by clicking and dragging the items.

4 Utilizing the Action Toolbar



The action toolbar in EZLynx 3 provides context-specific functions and features based on the current page or module. Here's how to use it effectively:

1. Pay close attention to the buttons and options available on the action toolbar when working on specific tasks, such as adding a policy or editing client details.
2. These buttons and options may change depending on the module you are in, so be sure to review them before proceeding with any actions.
3. Additional functions and features may be accessible through dropdown menus or expandable sections.

5 End





EZLynx - Set or Update Carrier Log-ins, Carrier Questions and Templates for PL Quoting

Downloaded on – Dec. 9, 2024, 3:22 a.m.

The following can be used to update EZLynx carrier log-in settings. These settings are used for PL quoting within EZLynx, as well as Client Center Quoting. If carrier log-ins are changed, they must be updated in EZLynx or quoting capabilities will not work.

Carrier Log-in codes must be set-up and added for each individual utilizing the personal lines rating system. If you do not have credentials for a carrier, please contact appropriate agency personnel.

Click here for tutorial [EZLynx - PL Rating Carrier Log-ins, Default Questions and Templates](#)

- 1** Hover over Settings icon and select Carrier Logins

*PDF Instructions Attached

Attachments

1. [Set or Update Carrier Logins for Quoting.pdf](https://pdfsweetprocess.com/media_access/?file=files/6301...)

- 2** At the right of each Independent Account (carrier), click Set

The State Specific Logins box is only used when you have a different login for different rating states (rarely used). Otherwise, only set the Rating State as Default and it is used for all rating states.

- 3** Enter the username and password used to log into the carrier site

- 4** When prompted, enter any other required information

- 5** Click Save & Test; we test the login on the carrier site to ensure its working

If successful, the Login Status displays a green check mark.

 If the login fails, test the login directly on the carrier site. Once the login works on the carrier site, it will set successfully in EZLynx.

6 End





EZLynx - Create a Proposal or Summary of Insurance

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This procedure will show you how to generate a Proposal or Summary of Insurance from EZLynx.

Proposal should be used if sending to a client for new and renewals.

Summary of Insurance should be used for pre-renewal review purposes or if a client requests for a summary to be sent to them for review.

Click here for video tutorial: [Creating a Proposal or Summary of Insurance](#)

1 Select the Client

Choose the client for whom you want to create a proposal or summary of insurance.

2 Click on Documents Tab and Click "Add" Button

Choose Proposal or Summary of Insurance

3 Name the Document

Create a name for the proposal or summary you are creating using the approved agency naming conventions.

Example: 23-24 All - Summary of Insurance

4 Add LOB's to Show on Document

You must add the individual line of business you want to show on the proposal or summary.

Even if it is a package policy, you must choose each LOB separately.

You can choose to pull information from a Policy or Application that has been completed.

5 Preview/Edit Document for Accuracy



If you need to make changes, you can open the proposal or summary from the documents tab by clicking on the three dots next to the document.

If you choose to Open in Editor, you can make changes there and it will save back to EZLynx. Otherwise, you can download and make changes from there.

6 Send to Client or Producer



If you are satisfied with the document, you can email it from EZLynx to the Producer or Client for review. Be sure to use the naming conventions in the subject line of your email so that it automatically labels that way when the email attaches to EZLynx.

7 End





EZLynx - User Settings, Super Search and Training Materials

Downloaded on – Dec. 9, 2024, 3:22 a.m.

The 2nd step into onboarding for EZLynx is adjusting your User Settings, understanding how to search for clients, and where to find additional help or training materials if needed.

Click on Video to watch: [EZLynx - User Settings, Search and Training Materials](#)

1 Accessing User Settings



To access the User Settings in EZLynx 2:

1. Click on the 'User Settings' link at the top right corner of the screen.
2. A drop-down menu will appear. Click on 'User Settings'.
3. The User Settings page will open, displaying various options and preferences for customization.

2 Using Super Search



To perform a Super Search in EZLynx 2:

1. Navigate to the 'Policy Search' tab located at the top of the screen.
2. On the 'Policy Search' page, click on the 'Super Search' button.
3. A Super Search form will appear, allowing you to specify multiple search criteria for more refined results.
4. Fill in the desired search parameters and click on the 'Search' button to execute the Super Search.
5. The search results will be displayed, showing policies that match your specified criteria.

3 Accessing Training Materials



To access training materials in EZLynx 2:

1. Open the EZLynx 2 application and log in using your credentials.
2. Once logged in, go to the 'Help & Training' tab located at the top of the screen.
3. In the 'Help & Training' section, you will find various resources such as user guides, video tutorials, and help articles to assist you in using EZLynx 2 effectively.

4. Click on the desired resource to access and view training materials.

4 End





EZLynx - Login Page & 2-Factor Authentication Setup

Downloaded on – Dec. 9, 2024, 3:22 a.m.

The first step for onboarding is logging into EZLynx and setting up the two-factor authentication.

Click on video to watch: [EZLynx - Login and 2FA Setup](#)

1 Access the EZLynx Login Page



1. Open a web browser and go to the EZLynx login page.
2. Enter your username and password in the respective fields.
3. Click on the 'Login' button to proceed.

2 Enable 2-Factor Authentication



1. After logging in to EZLynx, click on your username at the top right corner of the page.
2. From the drop-down menu, select 'My Profile'.
3. In the left sidebar, click on '2-Factor Authentication'.
4. Click on the 'Enable' button to start the setup process.
5. Follow the on-screen instructions to set up 2-Factor Authentication for your account.

3 End





EZLynx - Retention Center: Reviewing and Managing Renewals

Downloaded on – Dec. 9, 2024, 3:22 a.m.

Retention Center is a method of tracking and managing upcoming renewals within EZLynx. This tutorial will show you how to manage and review renewals from the Retention Center, as well as process Renewals and Rewrites on the policy header. Retention Center is meant to be reviewed in advance of the renewal in order to increase client retention

This tutorial will teach you how to:

1. Review upcoming expiring policies
2. Update Status of Renewal for tracking
3. Review pending renewals downloaded from carriers
4. Identify "High-Risk" and "Low-Risk" renewals for remarketing purposes
5. Generate Expiring vs Renewal Comparison snapshots
6. Close Renewals

Click here for tutorial: [EZLynx - Retention Center Navigation](#)



EZLynx - PL Rater Tutorial

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This tutorial will show you all features for utilizing the Personal Lines Rater within EZLynx and how to read, run and navigate Quotes.

Click here for tutorial: [EZLynx - Run, Read and Navigate Quotes for PL Rater](#).

1 EZLynx - PL : Adding a Manual Quote



All Quotes should be added to EZLynx to provide a clear summary of marketing efforts made as an easy reference for any team member, as well as for future reference and marketing purposes.

[EZLynx - Adding a Manual Quote](#)



EZLynx - Sales Center (Producer/AM/CSR)

Downloaded on – Dec. 9, 2024, 3:22 a.m.

Sales Center is the EZLynx pipeline to track and manage new business submissions for both Personal and Commercial lines accounts.

While the Sales Center is most beneficial for producers, it is recommended for Account managers and CSR's to have an understanding of Sales Center in the event they need to update or close out Opportunities.

Opportunities are created in EZLynx via automation once a new Prospect/Lead has been entered into EZLynx

[EZLynx - Sales Center - Navigation and Overview](#)



EZLynx - Adding and Managing a Claim

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This tutorial shows you how to create a claim for either commercial or personal lines accounts.

Please note carrier may download claim in system. You can confirm if claims information has been downloaded before manually entering.

Click here for Tutorial:[EZLynx - Adding & Managing a Claim](#)



EZLynx - Create New Applications

Downloaded on – Dec. 9, 2024, 3:22 a.m.

PURPOSE:

This procedure provides a tutorial on how to generate/create Acord applications from Inside EZLynx for new business accounts or prospects that do not have a currently active policy header or previously created application in EZLynx to copy from.

[EZLynx - Create Commercial Applications](#)



EZLynx - Deleting, Restoring, and Merging Accounts

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This tutorial shows you how to Delete, Restore or Merge duplicate accounts in EZLynx.

You should be careful not to Delete any Accounts unless it is 100% necessary. It is recommended to "Merge" duplicate accounts vs Deleting.

[EZLynx - Deleting, Restoring, and Merging Accounts](#)



EZLynx - Creating Submissions - Commercial Lines

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This procedure will show you step-by-step instructions for how to create a commercial lines submission in EZLynx. This step should be followed after creating the applications for each line of business you are quoting.

Click here for a tutorial on how to create Submissions inside of EZLynx

[EZLynx - Creating Commercial Lines Submission](#)



EZLynx - Updating Submissions - Commercial Lines

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This procedure will provide information on how to manage Submissions for Commercial Lines, and should be followed in order to update the status or close out a submission in EZLynx.

Click here for tutorial: [EZLynx - Managing Carrier Submissions](#)



EZLynx - Binding and Updating Opportunities

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This tutorial shows shows you how to process bound business inside of EZLynx, as well as manage and close out existing Opportunities

[EZLynx - Policy Sold or Business Lost - Binding and Opportunites](#)



EZLynx - Binding and Updating Opportunities

Downloaded on – Dec. 9, 2024, 3:22 a.m.

This tutorial shows shows you how to process bound business inside of EZLynx, as well as manage and close out existing Opportunities

[EZLynx - Policy Sold or Business Lost - Binding and Opportunites](#)



EZLynx - Create Manual Policy

Downloaded on – Dec. 9, 2024, 3:22 a.m.

In order to create a manual policy header, an application for each line of business should already be created. You will then convert the applications into policy headers.

1 Create Application for Each Line of Business

Each Line of Business should have its own application.

Click here for tutorial on creating applications

[EZLynx - Create New Applications](#)

2 Convert Application into a Policy Header

Once applications have been created for each line of business, they can be converted into a policy header.

[EZLynx - Converting an Application to a Policy](#)

3 Click on each tab inside policy header to update

The main policy screen should be updated to include:

Policy Number

Effective Date

Master Carrier

Underwriting Company

Billing Type (Agency Bill or Direct Bill)

Premium

Description for Policy Header: Should be YY-YY LOB format

Click on Save and Edit Policy

Click through each tab to ensure all coverages, limits, deductibles and exposures are reflected correctly according to the policy.

4 End



EZLynx - Creating Certificates of Insurance / Master and Individual

Downloaded on – Dec. 9, 2024, 3:22 a.m.

Click here for tutorial: [Creating Master Certificate Set](#)



EZLynx - Lost Policy Release Forms / Cancellation of Policy / Reinstatement

Downloaded on – Dec. 9, 2024, 3:22 a.m.

Click here for EZLynx tutorial on how to generate Lost Policy Release forms, process Cancellations of a policy header, or to Reinstate a policy header

[EZLynx - LPR, Cancellation, and Reinstatement](#)



EZLynx - Renew Policy - (AM/CSR)

Downloaded on – Dec. 9, 2024, 3:22 a.m.

PURPOSE

This procedure outlines the steps to follow when a policy is being renewed with the same carrier.

JOB ROLE/RESPONSIBILITY: ACCOUNT MANAGER/CSR

1 Confirm Submission, Quotes and/or Opportunity status updated and closed



All carrier submissions should have their status as Declined or Quoted.

If Quoted, make sure to enter final premium proposed for easy reference in future.

*Opportunity shouldn't be created for Renewal or Rewrite.

2 Renew the Policy Header, if not already downloaded



1. Go to policy header and Click on Actions tab
2. Select "Service"
3. Select "Renew"

The screenshot shows the EZLynx software interface for managing client profiles. On the left, a sidebar displays client information for 'Jerry Smith'. The main area is titled 'Account Overview' and shows sections for 'Policies', 'Applications', and 'Tasks'. In the 'Actions' dropdown menu, which is open over the 'Policies' section, the 'Service' option is highlighted with a red box, and its sub-menu item 'Renew' is also highlighted with a red box. Other options in the 'Service' menu include 'Audit', 'Cancel', 'Change', 'Change Request', and 'Create Application'. The 'Tasks' section to the right indicates there are no tasks assigned.

3 Update Policy Screen



Check/Update remaining fields on policy screen:

1. Policy Number - Enter exactly as carrier has it for downloading purposes
2. Effective Date/Expiration Date
3. Master Company/Carrier - If not available in drop-down, contact Neal or Kurt Kruezer at IAA
4. Add Underwriting Company - If not available in drop-down, contact Neal or Kurt Kruezer at IAA
5. Billing Type: Agency Bill or Direct Bill
6. Premium
7. Commission %
8. Description of Policy: Using Naming conventions: YY-YY LOB

The screenshot shows the 'Add Policy' interface. On the left, under 'POLICY INFO', the 'Rewrite Of' field contains 'H15679403' with a note: 'Please enter policy # exactly as it appears on the policy on the carrier's site. A duplicate policy could be created if entered incorrectly.' On the right, under 'PREMIUM & ADDITIONAL CHARGES', 'Written Premium' is listed as '\$1,700.00'. In the 'DEPARTMENT' section, 'Personal Lines (P/L)' is selected. Under 'SERVICE TEAM', there are two entries: 'EZLynx User (Producer)' with '20 %A \$0.00' and another entry with '5 %A \$0.00'. The 'Description' field contains 'Rewrite'.

4 Update Policy Application Screens



Go through each tab to ensure all information is updated and fields are completed as much as possible, including expanding of all Underwriting and General Tabs.

Be thorough in completing/updating the Application screens inside the policy header. A few extra moments on this step will save great amounts of time in the future.

Important information to include:

1. Updated Client Exposures obtained during renewal review.
2. Scheduled or Blanket Endorsements
3. Owners Included or Excluded from coverage (WC)
4. Number of Employees
5. Building COPE information (sprinklers, alarms, construction, year built, sq ft)
6. Rating Exposures: Payroll by class code, Revenue, or Square Footage

7. Any other rating information obtained for easy reference next year.

5 Save and Close

6 Review and Organize Documents

Click on Documents tab in client account

Confirm documents have been labeled properly or rename if needed according to agency naming conventions

Move documents into category folders as applicable (not all documents may fit into category, but most should).

7 End



EZLynx - Rewrite Policy - (AM/CSR)

Downloaded on – Dec. 9, 2024, 3:21 a.m.

PURPOSE

This procedure outlines the steps to follow when a policy is being rewritten with a different carrier other than expiring.

JOB ROLE/RESPONSIBILITY: ACCOUNT MANAGER/CSR

1 Confirm Submission, Quotes and/or Opportunity status updated and closed

All carrier submissions should have their status as Declined or Quoted.

If Quoted, make sure to enter final premium proposed for easy reference in future.

*Opportunity shouldn't be created for Renewal or Rewrite.

2 Update EZLynx LOB Applications with Bound Quote or Policy

Be thorough in completing/updating the Applications. A few extra moments on this step will save great amounts of time in the future.

If Application exists:

1. Go to Applications
2. Click on each LOB
3. Update coverages, limits, deductibles and exposures with all information according to Bound Quote or Policy.

If no Application exists, Manually Create Application

1. Click on Applications tab
2. Click Add Application
3. Select pre-existing policy header as the Application instead of New. This will pre-fill most of the client information. Please note that it will have all of the prior carrier limits and exposures, and will need to be updated with new carrier information from bound quote.
4. Update coverages, limits, deductibles and exposures with Bound Quote or Policy

Important information to include in either scenario:

1. Scheduled or Blanket Endorsements
2. Owners Included or Excluded from coverage (WC)
3. Number of Employees
4. Building COPE information (sprinklers, alarms, construction, year built, sq ft)
5. Rating Exposures: Payroll by class code, Revenue, or Square Footage
6. Any other rating information obtained for easy reference next year.

3 Convert LOB Application to Policy in EZLynx

DO NOT SKIP THIS STEP EVEN IF CARRIER DOWNLOADS

New policy header must be created for Rewrites. You cannot create one from existing policy header.

Click here for tutorial if needed [EZLynx - Converting an Application to a Policy](#)

4 Update Policy Screen

There are a few steps you will need to complete here:

1. Change Policy Transaction Screen shows "Rewrite" and not New Business.

*Note, if carrier downloads the policy before you have a chance to manually create it, you will still need to Edit the Policy header and change the transaction type from New business to Rewrite.

2. Associate expiring policy number by selecting it from dropdown.

3. Complete remaining fields on policy screen:

1. Policy Number - Enter exactly as carrier has it for downloading purposes.
2. Effective Date/Expiration Date
3. Master Company/Carrier - If not available in drop-down, Contact Neal or Kurt Kruezer at IAA to add
4. Add Underwriting Company - If not available in drop-down, Contact Neal or Kurt Kruezer at IAA to add
5. Billing Type: Agency Bill or Direct Bill
6. Premium
7. Commission %
8. Description of Policy: Using Naming conventions: YY-YY LOB

5 Save and Close



If you already updated your coverage limits, deductibles and exposures, you do not have to click back through the applications screen, and you can click 'Save and Close'!

6 Review Documents, Rename, Organize accordingly



1. Click on Documents Tab
2. Review all attachments to make sure they are properly labeled according to agency naming conventions. Rename as necessary.
3. Move documents into applicable category folders (not all documents may fit into one of these categories).

7 Confirm if Expiring Policy Automatically Renewed



Check to see if incumbent carrier automatically renewed the policy. This can be verified by seeing if policy downloaded in EZLynx, or policy renewed on carrier portal.

If coverage automatically renewed with current carrier, but being rewritten to new carrier the automatic renewal will need to be cancelled using a signed LPR from the client and sent back to carrier.

Create separate task for yourself using checklist: **Cancellation Request** and follow procedure separately for proper cancellation. You can click here to review. :[Cancellation Request/LPR \(AM/CSR\)](#)

8 End

