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 created efficiency for the agency and well as protects agency E&O.

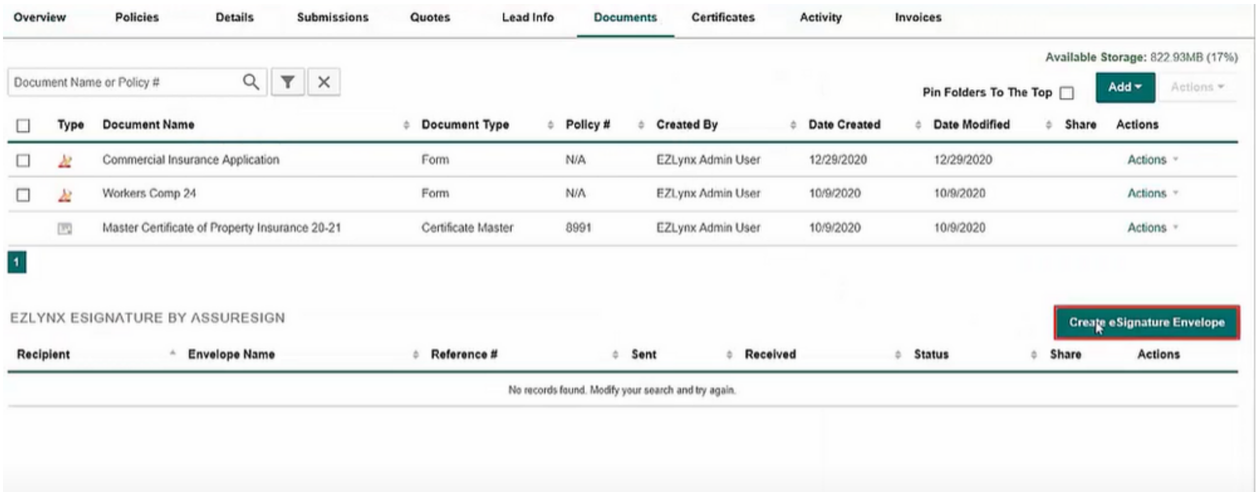
[EZLynx - Create and Send eSignature Envelope]

1 Go to Client Account

2 Click on Documents Tab

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

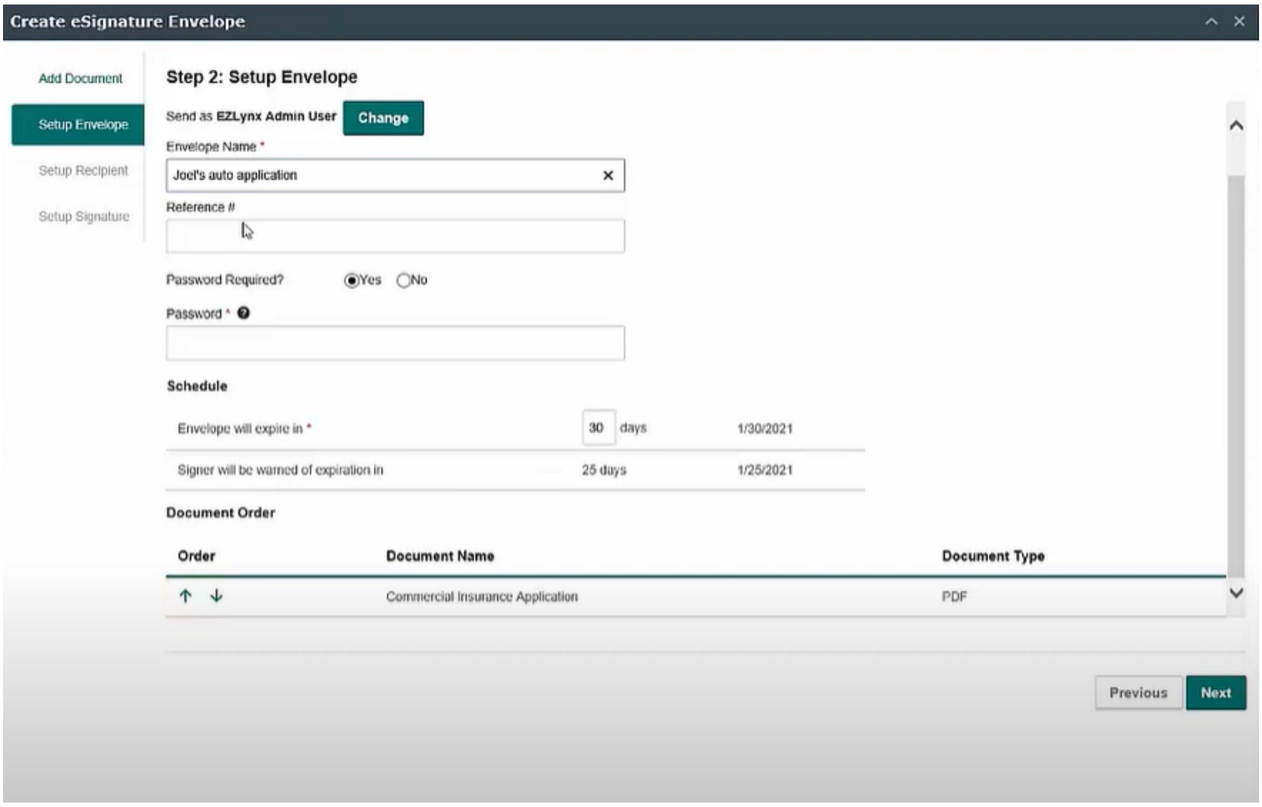
3 Click on eSignature Envelope



4 Choose Document to Send for Signature

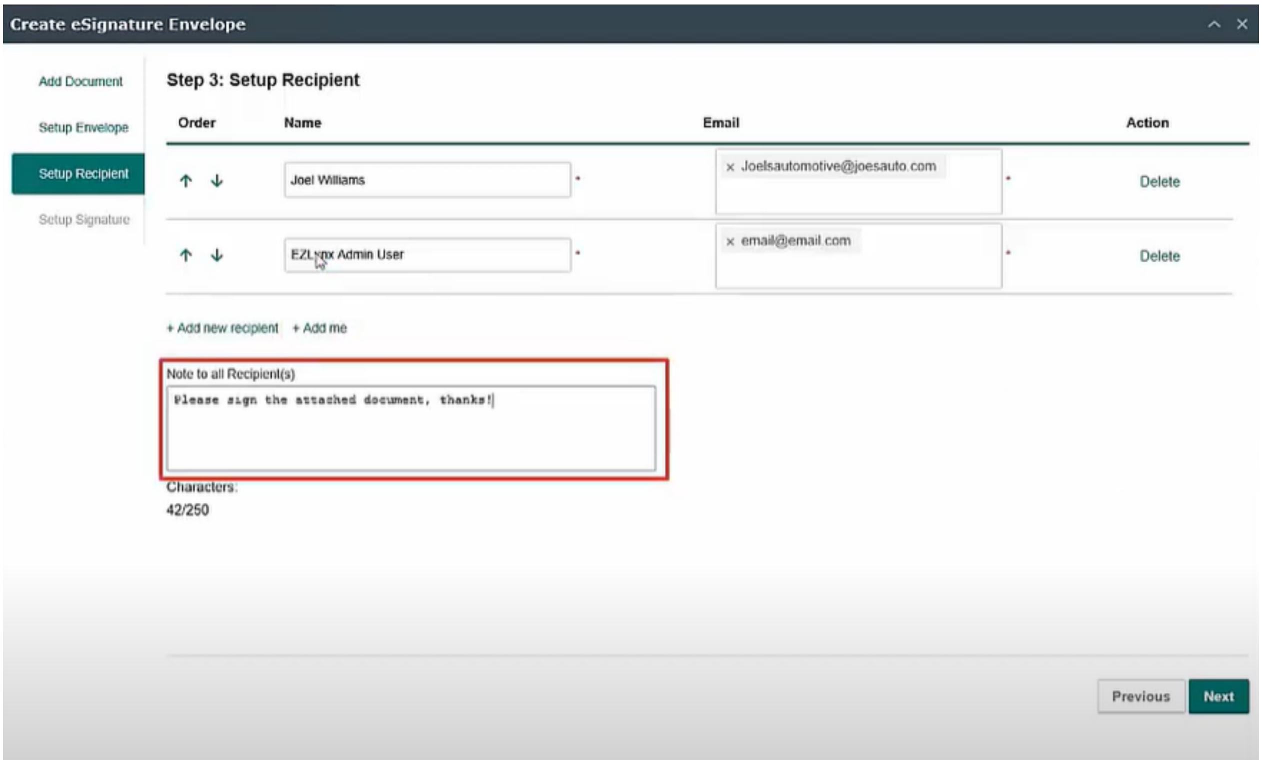
5 Setup Envelope

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.



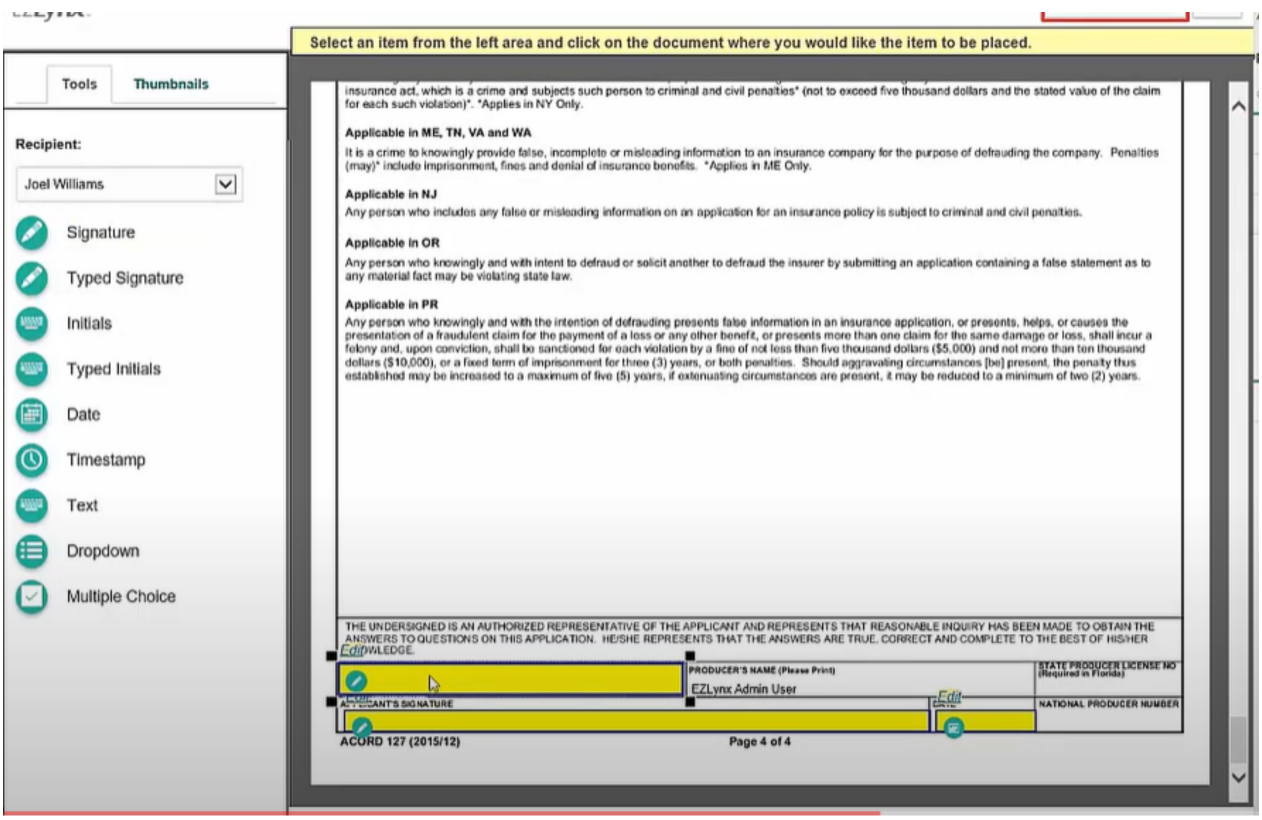
6 Add Recipient Email Address

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.



7 Setup Signature Fields

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

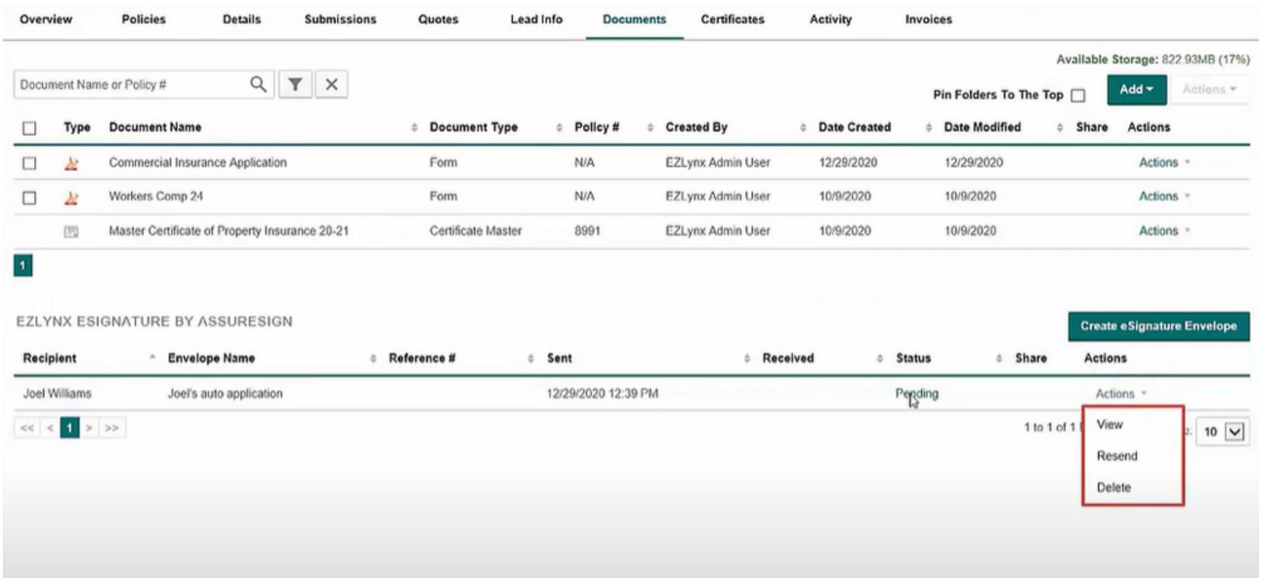


8 Review Document and Click 'Send'

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.

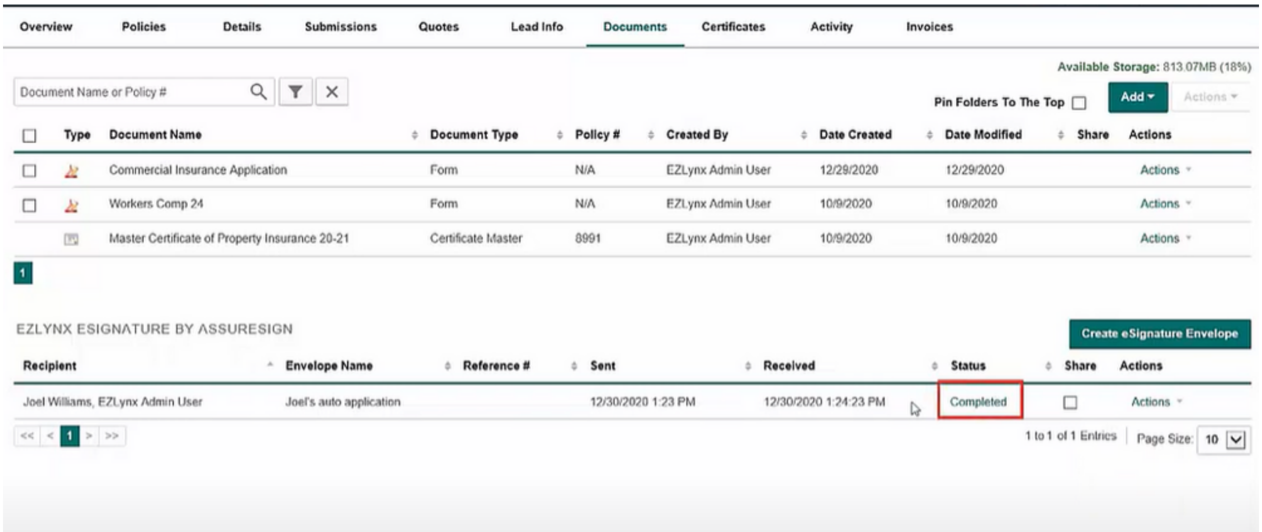
You can also view the document, resend for follow-up or delete if an error has been made or signature is no longer required.

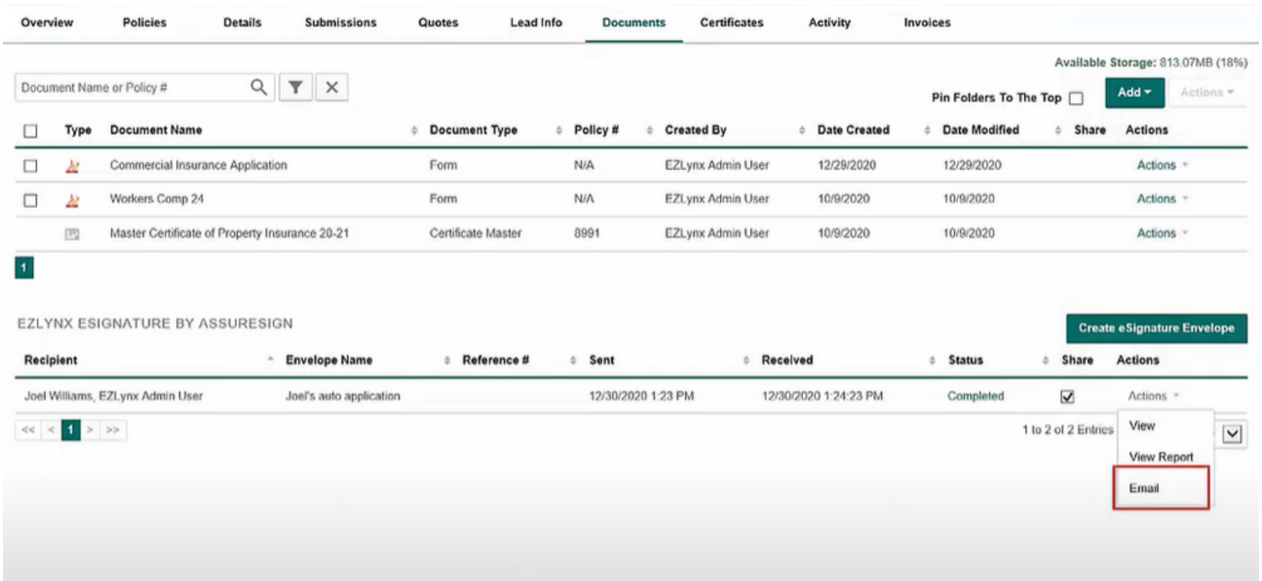


10 Completed - eSignature Obtained from client

Once signatures have been obtained, status will automatically changed 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%)
Document Name or Policy #
Pin Folders To The Top
Add
Actions
Type
Document Name
Document Type
Policy #
Created By
Date Created
Date Modified
Share
Actions
Commercial Insurance Application
Form
N/A
EZLynx Admin User
12/29/2020
12/29/2020
Actions
Workers Comp 24
Form
N/A
EZLynx Admin User
10/9/2020
10/9/2020
Actions
Master Certificate of Property Insurance 20-21
Certificate Master
8991
EZLynx Admin User
10/9/2020
10/9/2020
Actions
EZLYNX ESIGNATURE BY ASSURESIGN
Create eSignature Envelope
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
Completed
Actions
1 to 1 of 1 Entries
Page Size: 10


Overview
Policies
Details
Submissions
Quotes
Lead Info
Documents
Certificates
Activity
Invoices
Available Storage: 813.07MB (18%)
Document Name or Policy #
Pin Folders To The Top
Add
Actions
Type
Document Name
Document Type
Policy #
Created By
Date Created
Date Modified
Share
Actions
Commercial Insurance Application
Form
N/A
EZLynx Admin User
12/29/2020
12/29/2020
Actions
Workers Comp 24
Form
N/A
EZLynx Admin User
10/9/2020
10/9/2020
Actions
Master Certificate of Property Insurance 20-21
Certificate Master
8991
EZLynx Admin User
10/9/2020
10/9/2020
Actions
EZLYNX ESIGNATURE BY ASSURESIGN
Create eSignature Envelope
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
Completed
Actions
1 to 2 of 2 Entries
View
View Report
Email

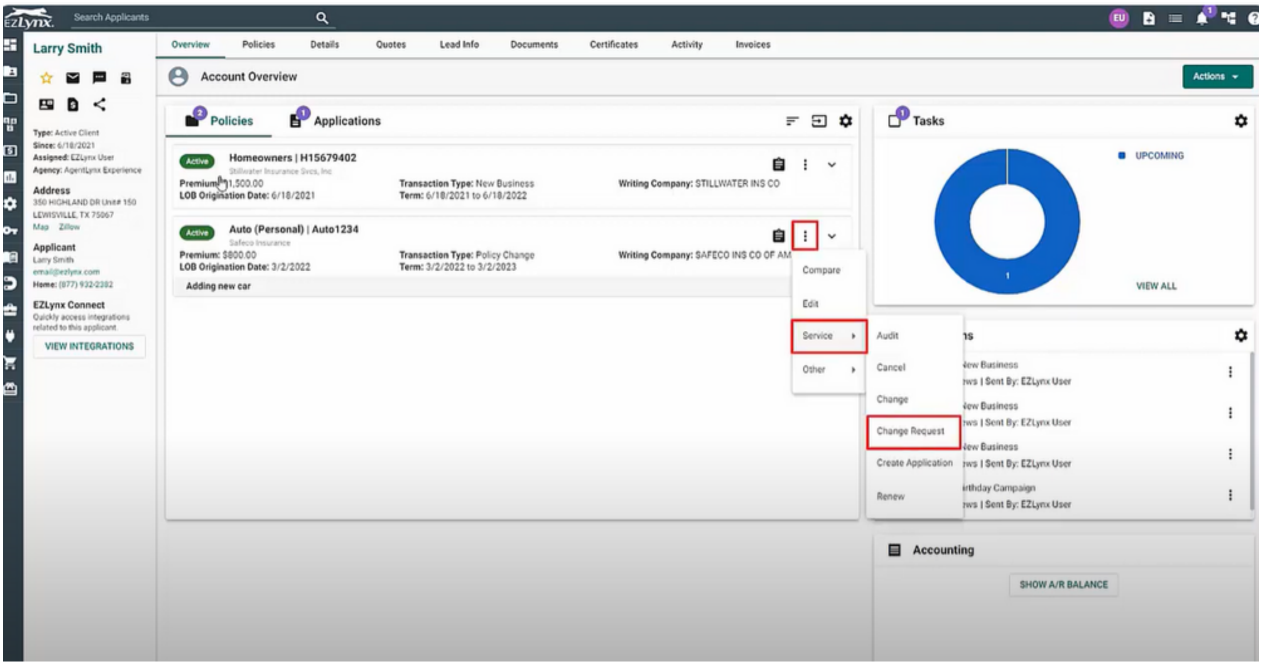
11 End

EZLynx - Create Policy Change Request

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'



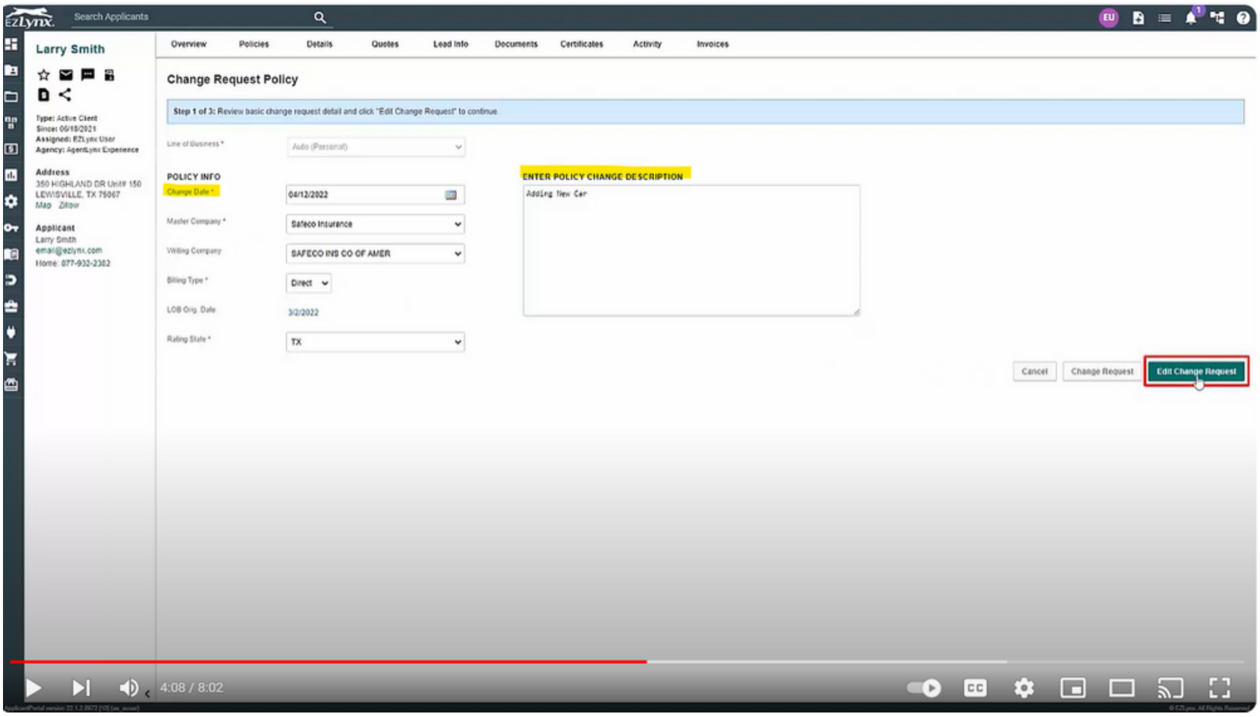
2 Complete Change Request Screen

1.) Enter Endorsement Effective Date

2.) Enter Policy Change Description according to agency naming conventions

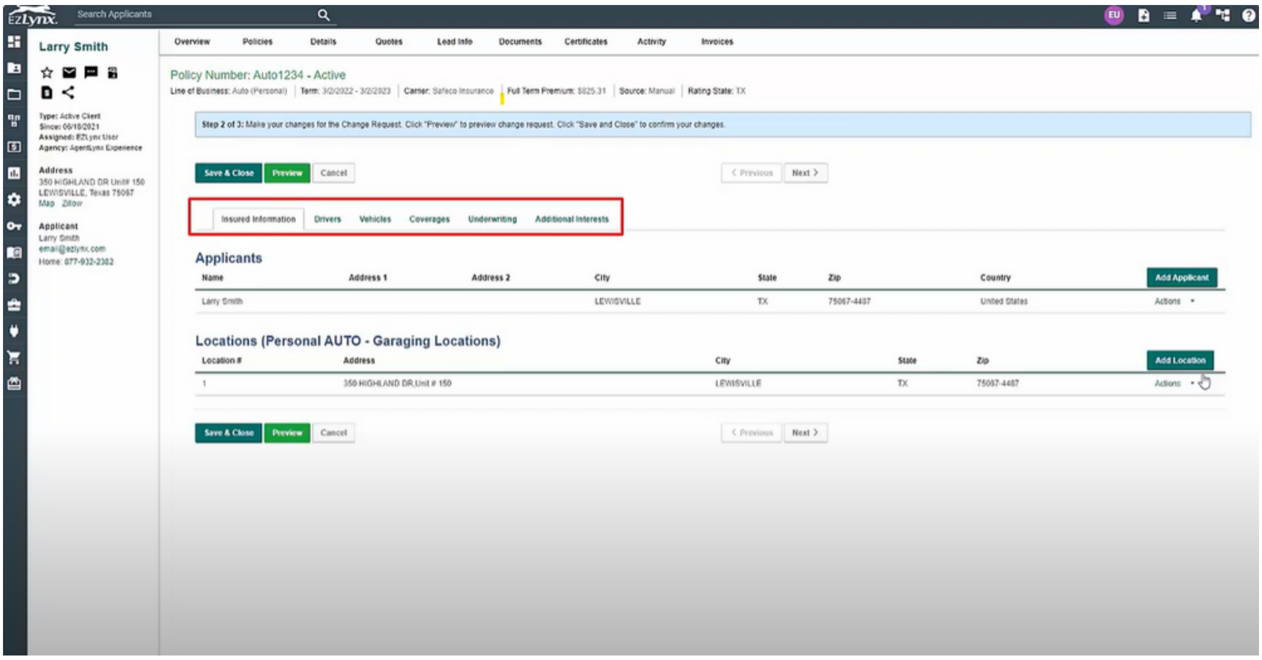
YY-YY LOB - Endorsement Req - (Describe Change) - Eff Date

3.) Click 'Edit Change Request'



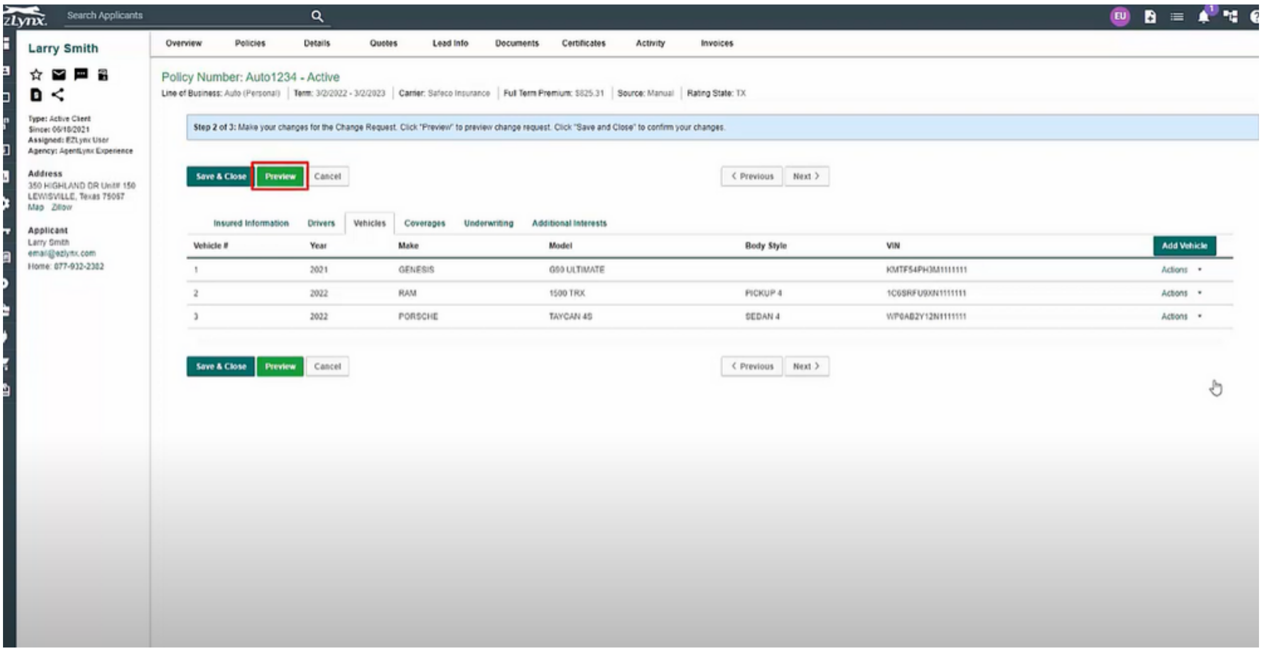
3 Update Coverage or Exposure Screens with Changes

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.



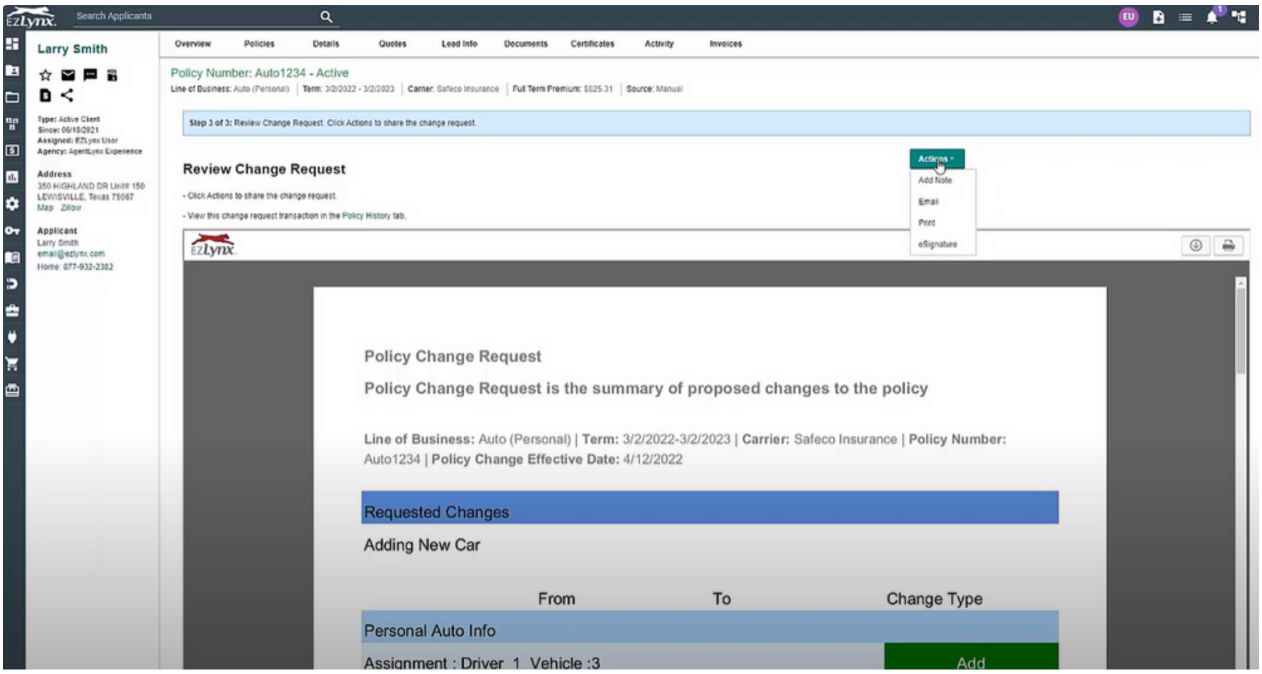
4 Preview Change Request for Accuracy

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.



5 Generate Change Request Form

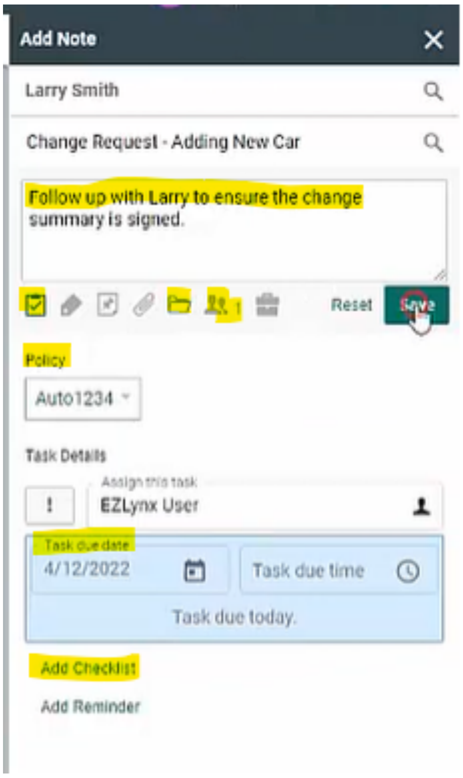
1. Click 'Save and Close' to generate Change Request Form
2. Click 'Actions' and 'Email' to send request to carrier u/w or processing center



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'



7 End

EZLynx - Managing Renewals and Rewrites

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.

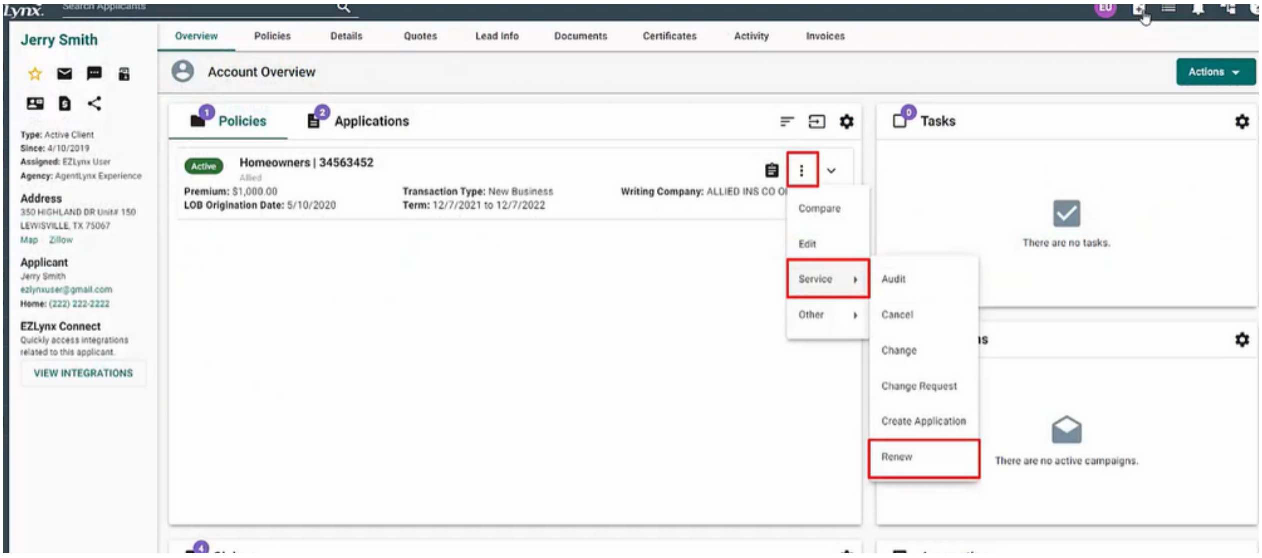
If Commercial Lines, you can convert the existing policy header into an Application for upcoming policy term and create the Submission(s) to the carrier.

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"



4. Review and Update Policy Screen and Coverage Screens
5. Click Save.

Next step 7: *End*

Next step 7: End

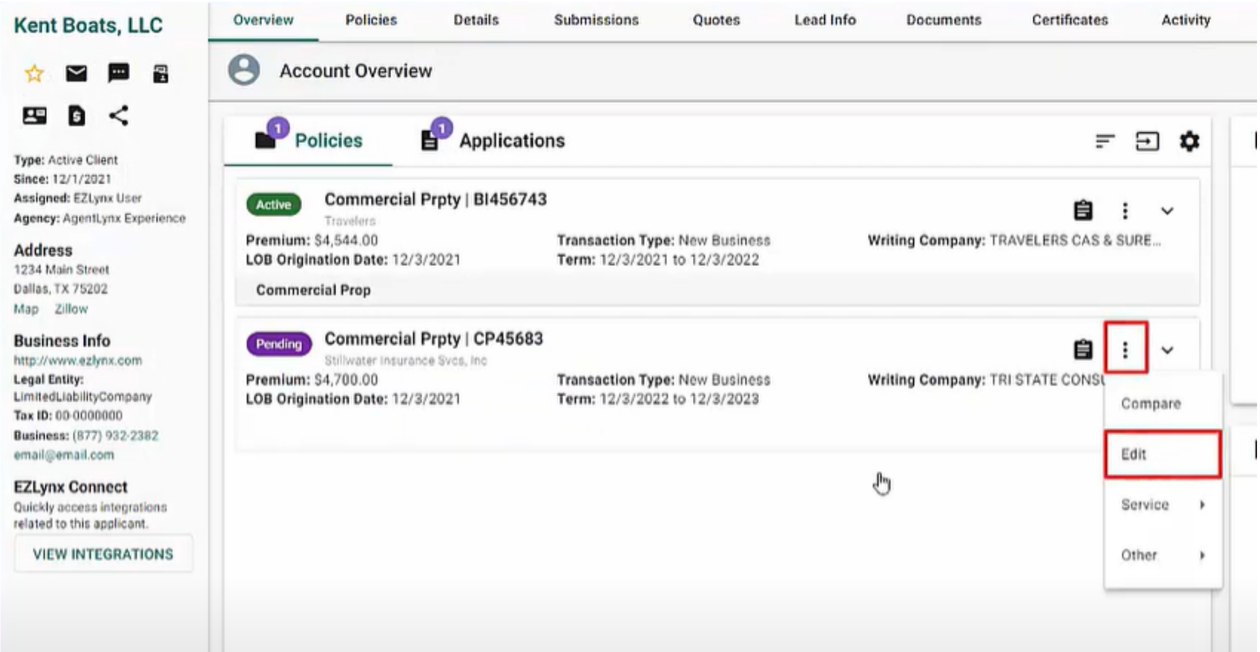
5 Rewriting a Policy Header that Downloads

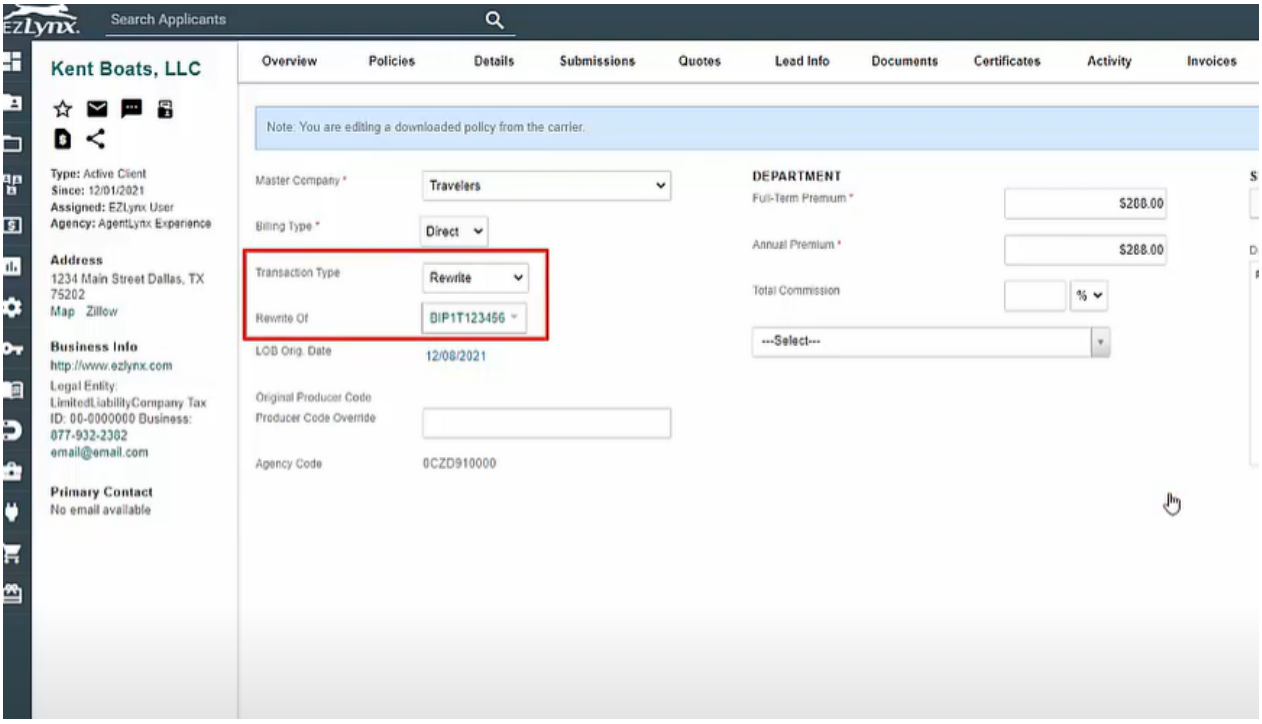
If a policy is renewed with a different carrier, this is considered a "Rewrite".

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



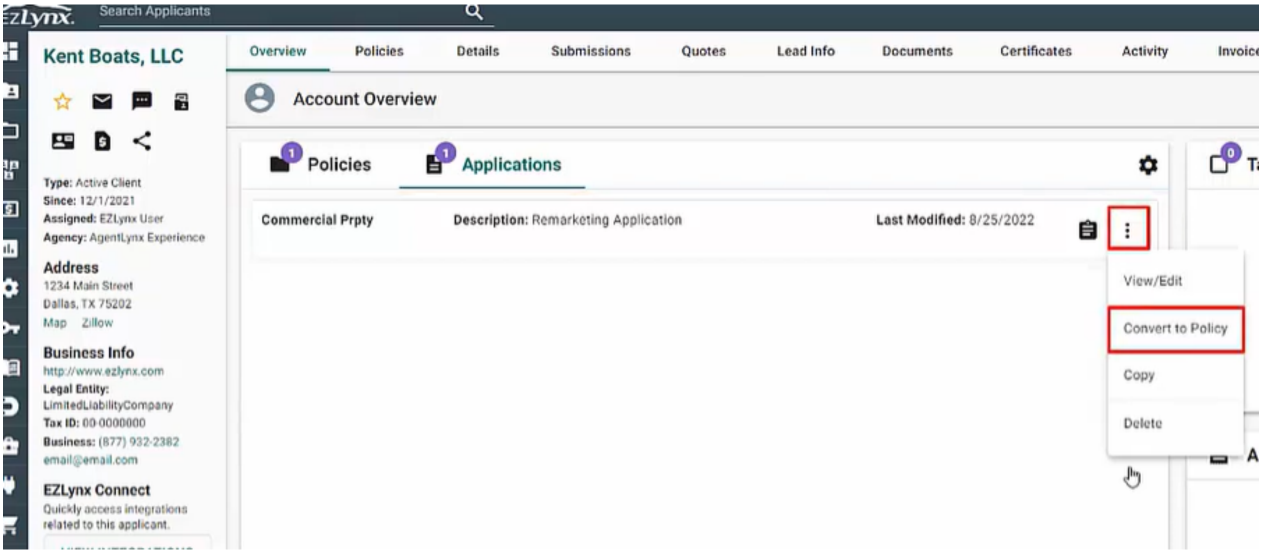


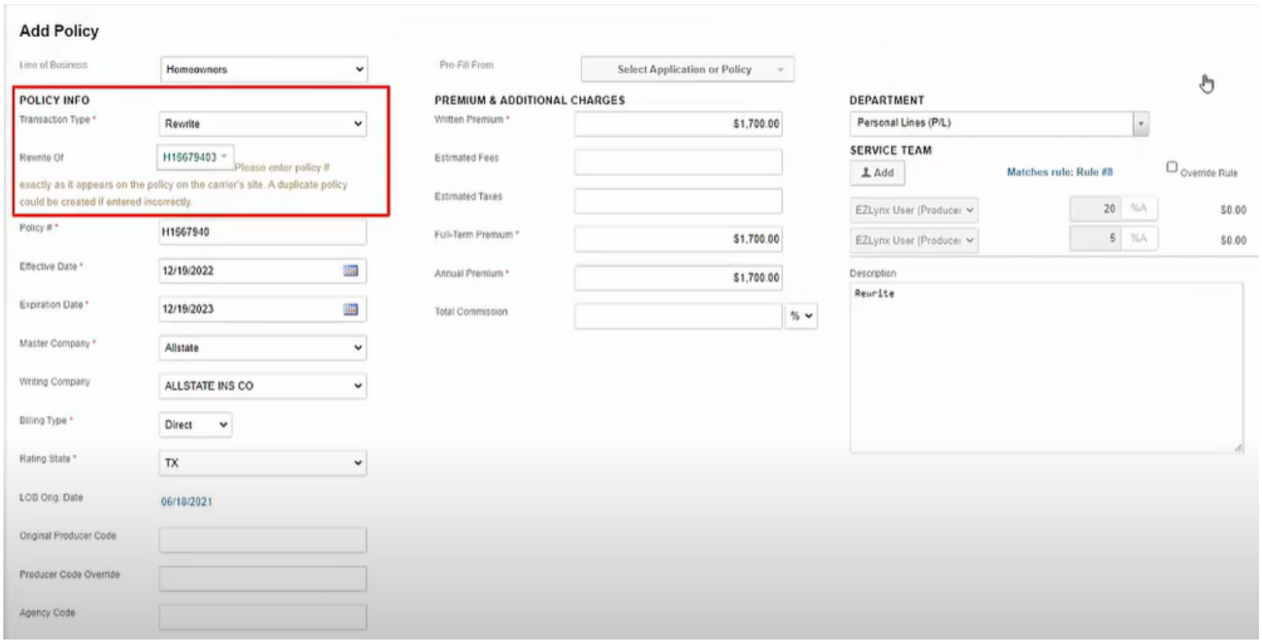
6 Rewriting a Policy Header Manually

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:

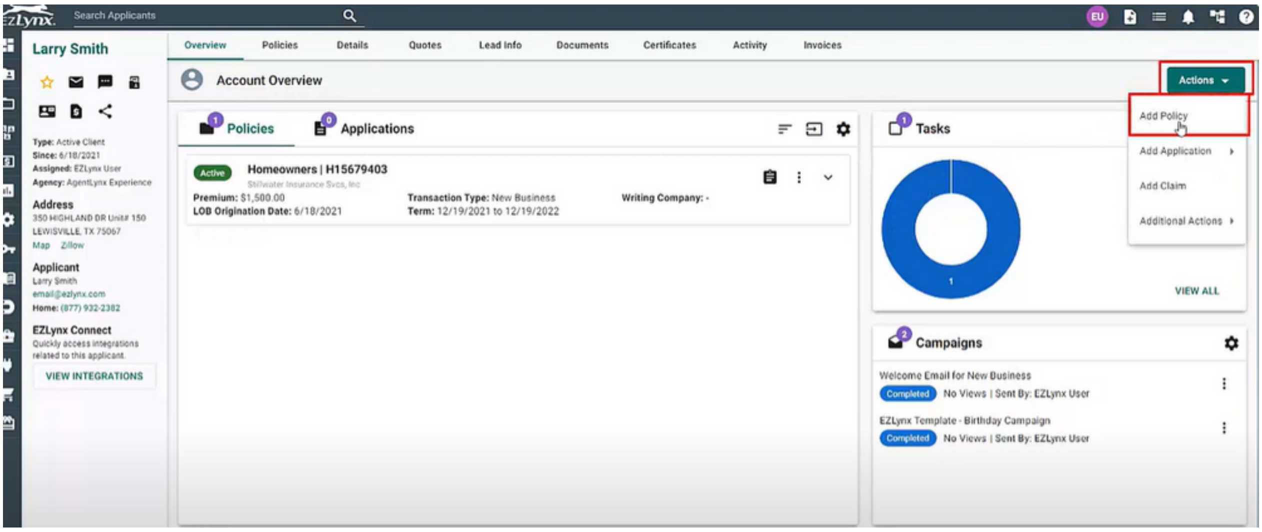
1. Click Actions from Applications tab
2. Click "Convert to Policy"
3. Change Transaction Type from New Business to Rewrite
4. Associate Expired Policy by selecting the policy number

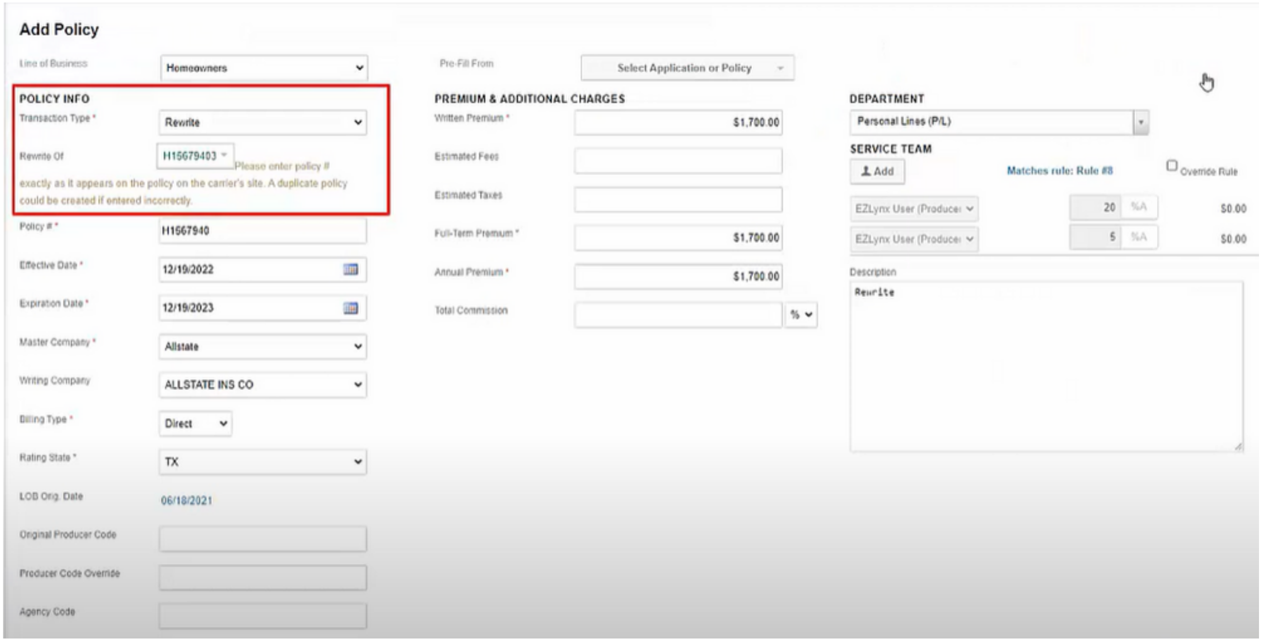




2.) Manually Create Applications to Convert to Policies :

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


Larry Smith
Overview
Policies
Details
Quotes
Lead Info
Documents
Certificates
Activity
Invoices
Account Overview
Actions
Add Policy
Add Application
Add Claim
Additional Actions
Policies
Applications
Tasks
Homeowners | H15679403
Premium: $1,500.00
LOB Origination Date: 6/18/2021
Transaction Type: New Business
Term: 12/19/2021 to 12/19/2022
Writing Company: -
VIEW ALL
Campaigns
Welcome Email for New Business
EZLynx Template - Birthday Campaign
Address
Applicant
EZLynx Connect
VIEW INTEGRATIONS


Add Policy
Line of Business
Homeowners
Pre-Fill From
Select Application or Policy
POLICY INFO
Transaction Type
Rewrite
Rewrite Of
H15679403
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
Effective Date
12/19/2022
Expiration Date
12/19/2023
Master Company
Allstate
Writing Company
ALLSTATE INS CO
Billing Type
Direct
Rating State
TX
LOB Orig. Date
06/18/2021
Original Producer Code
Producer Code Override
Agency Code
PREMIUM & ADDITIONAL CHARGES
Written Premium
$1,700.00
Estimated Fees
Estimated Taxes
Full-Term Premium
$1,700.00
Annual Premium
$1,700.00
Total Commission
DEPARTMENT
Personal Lines (P/L)
SERVICE TEAM
Add
Matches rule: Rule #8
Override Rule
Description
Rewrite

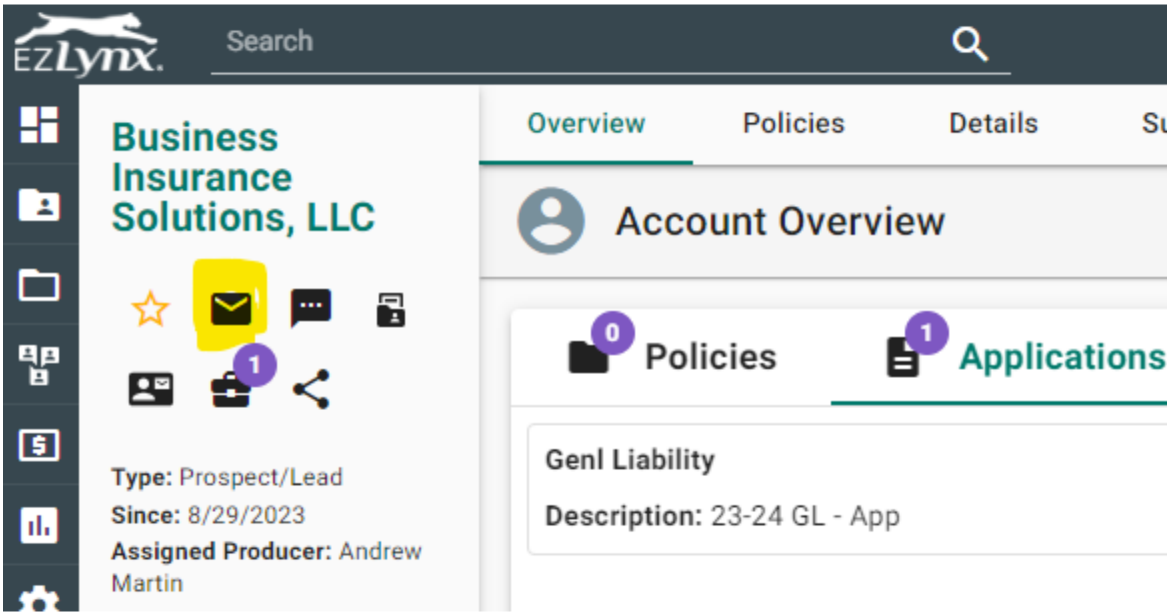
7 End

EZLynx - Sending an Email from EZLynx Using Email Templates

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

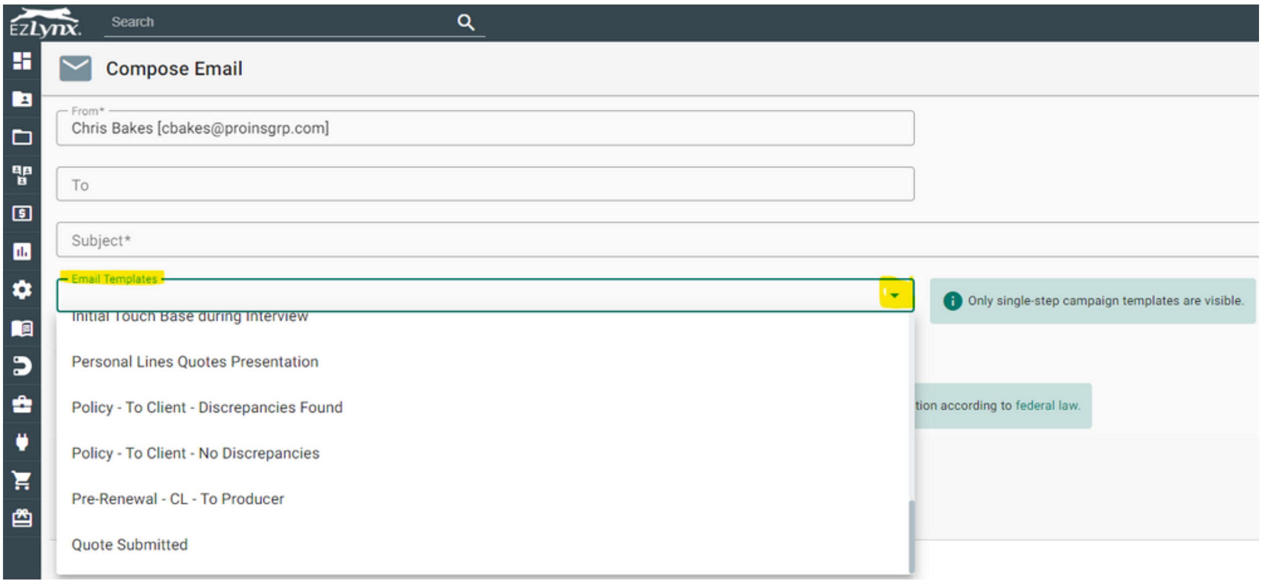
It is recommended to email from inside of EZLynx as much as possible in order to automatically attach your email correspondence to the system.

1 Click on Email Icon from Account in EZLynx



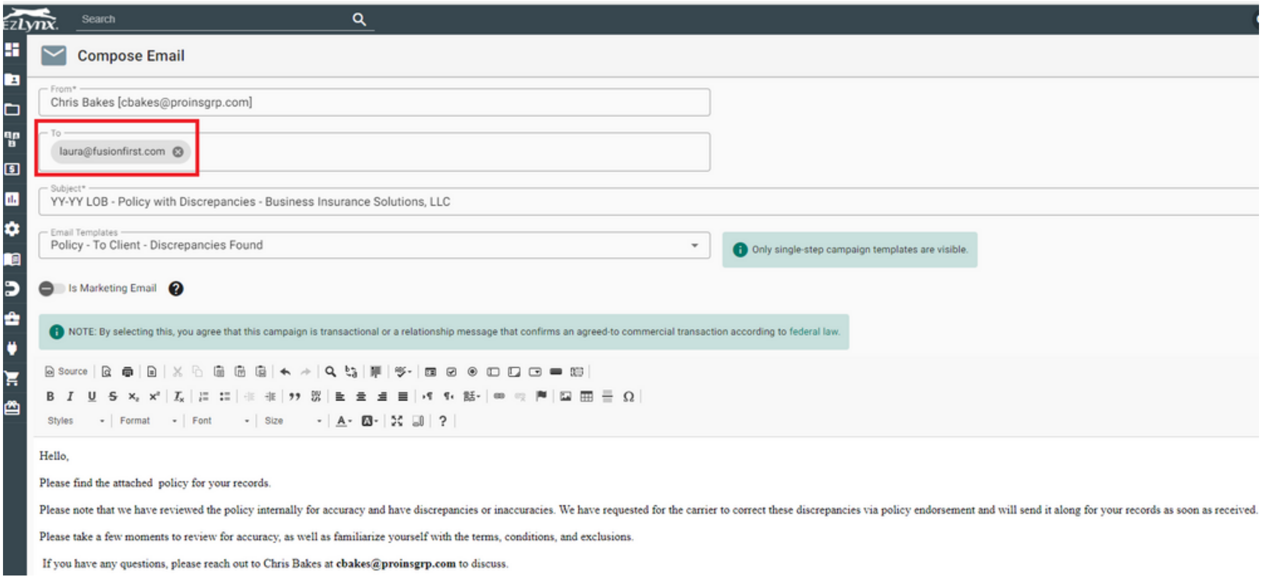
2 Select Email Template from Dropdown Menu

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

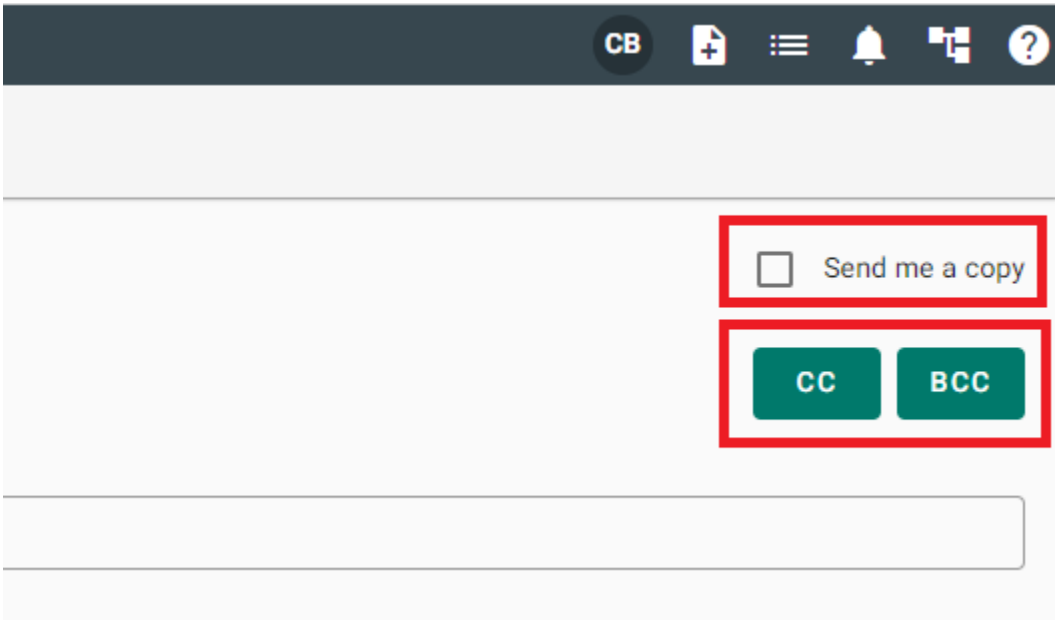


3 Select or Type Email Address for Client

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



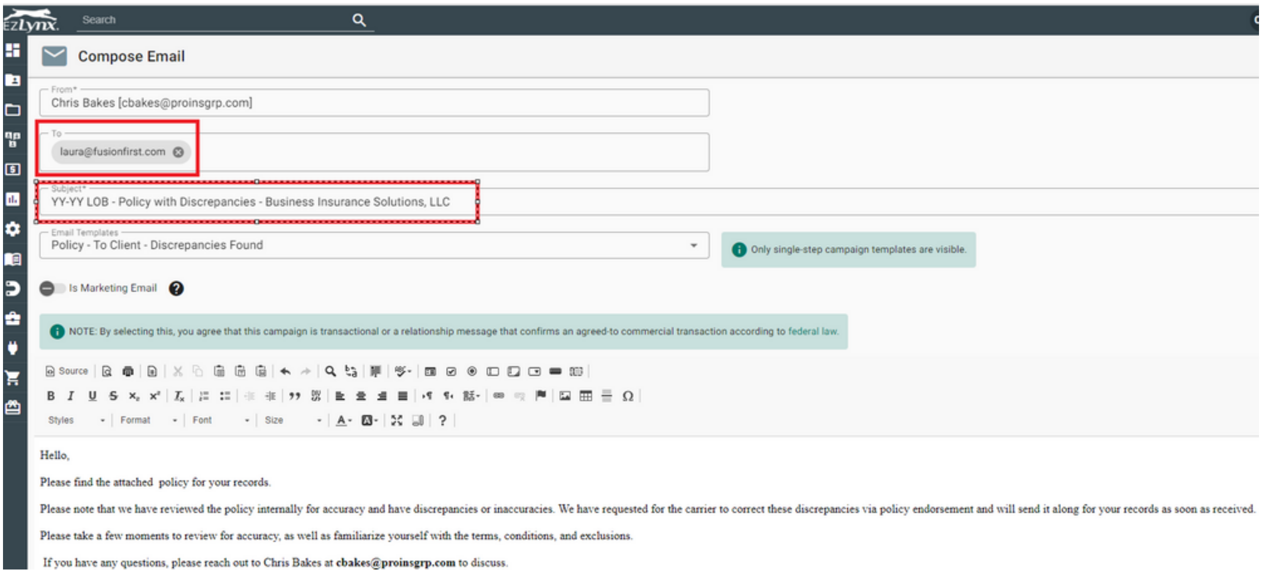
4 CC, BCC, or Include a Copy to Yourself (if applicable)



5 Update Subject Line

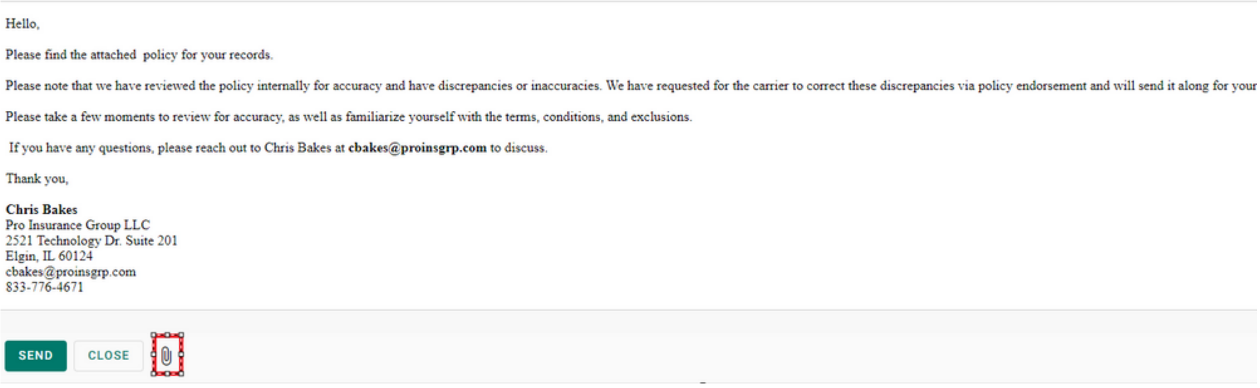
A subject line will automatically populate, but will require updating according to agency naming conventions.

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



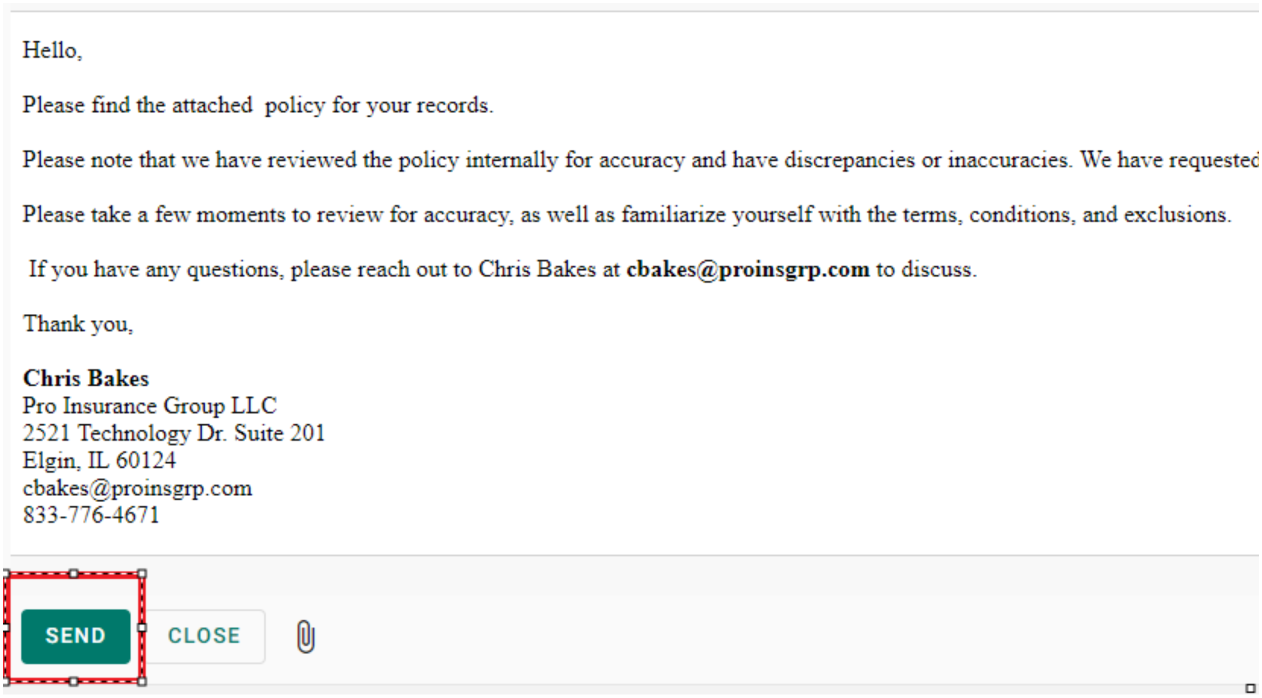
6 Add Attachments

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



7 Review for Accuracy and Send to Client

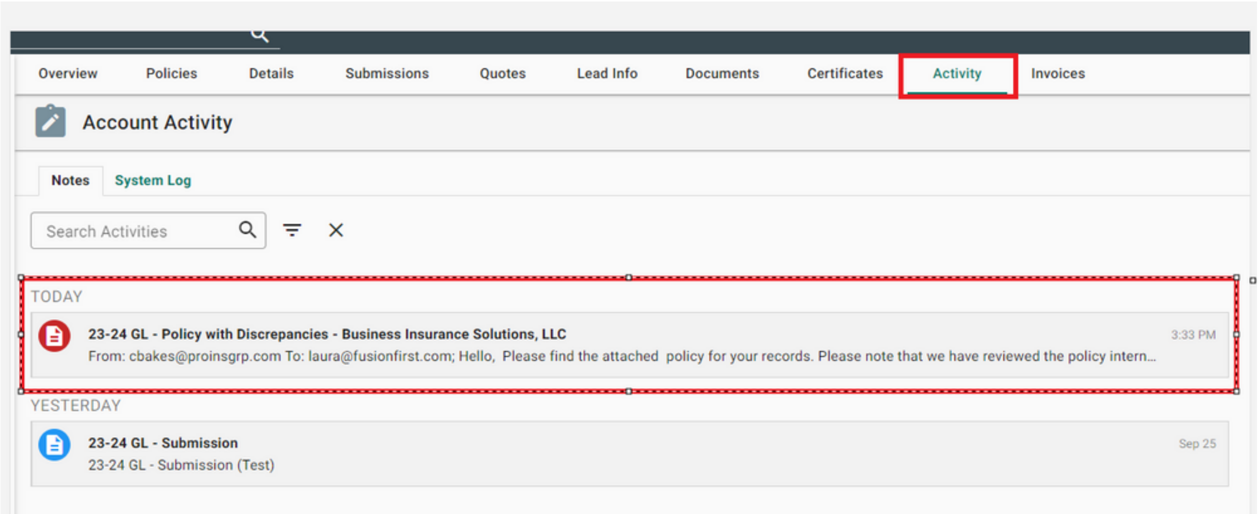
Review body of email for accuracy and to ensure all proper wording is included that you want to communicate to the client.



8 Email Attaches to EZLynx

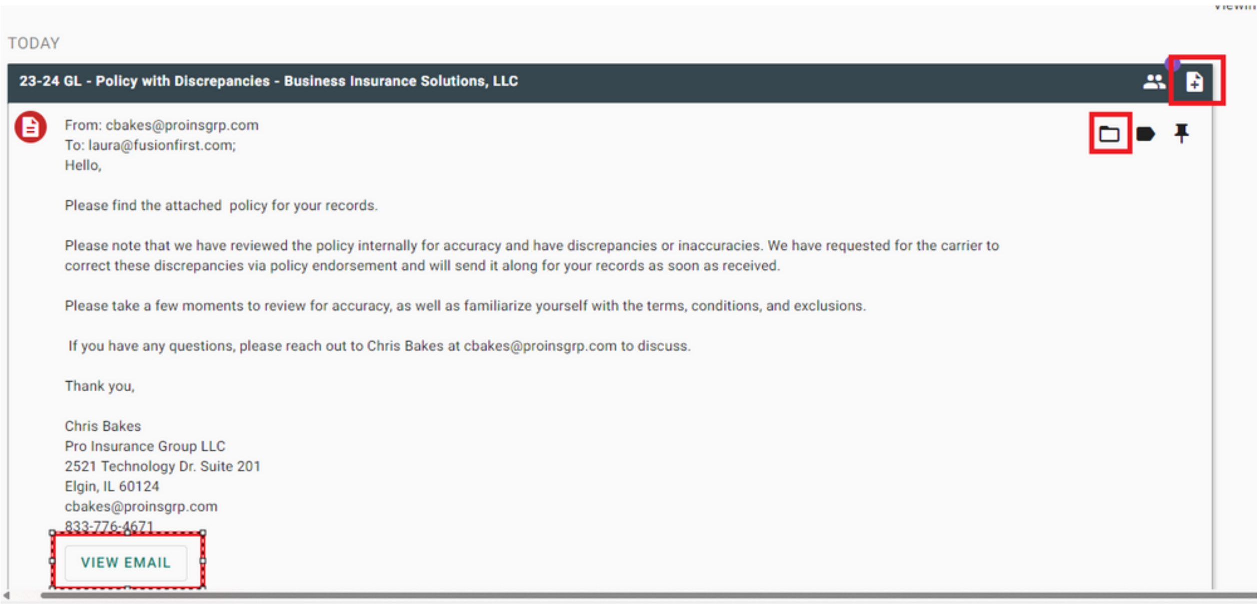
Once you hit send, your email will be automatically attached to the Activity screen in EZLynx.

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.



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.



10 End

EZLynx - Compare and Create Policy Summary

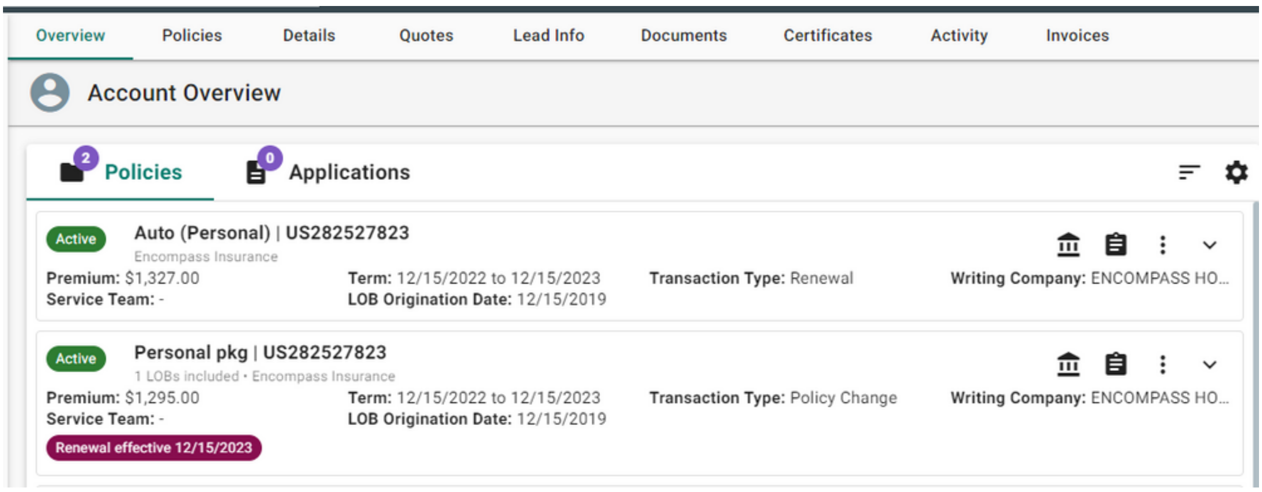
This procedure can be used to quickly compare two policies in a customer's account in EZLynx to quickly identify changes made from an expiring to a renewal policy. This can be used as part of the pre-renewal process or at any time you wish to compare coverages and differences between two policies.

1 Pull up Client Account in EZLYnx

2 Locate Policy Header for Comparison

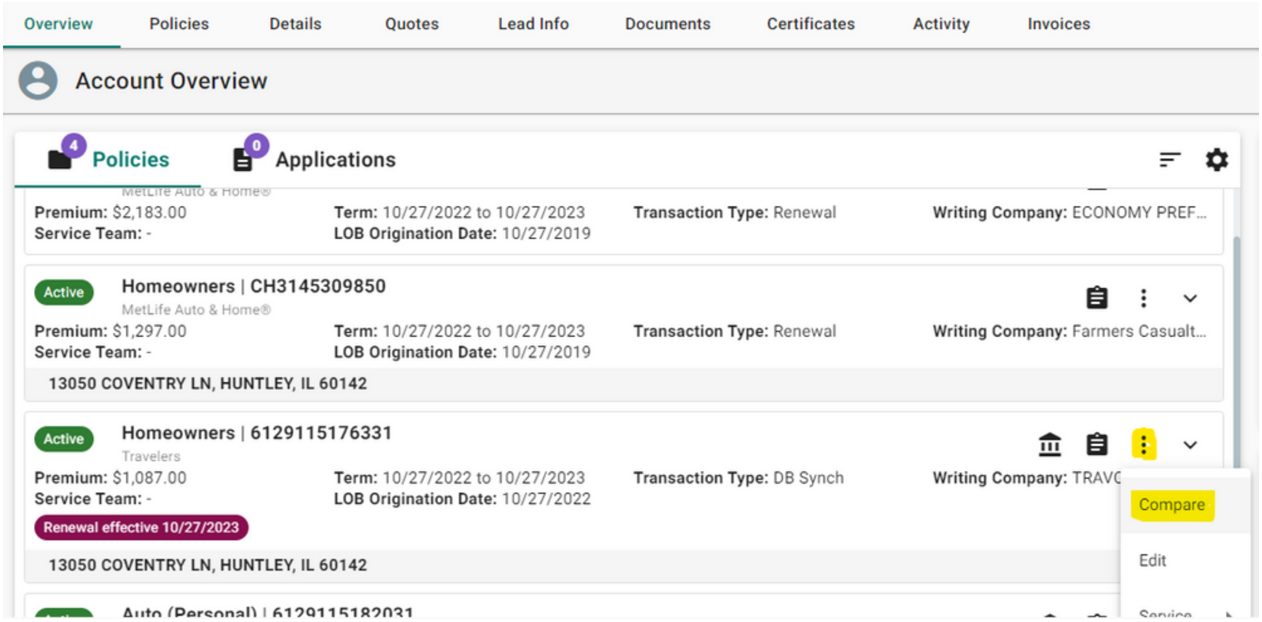
Find the policy you wish to compare from the client Overview screen.

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



3 Compare policy

1. Click on Action icon
2. Select Compare

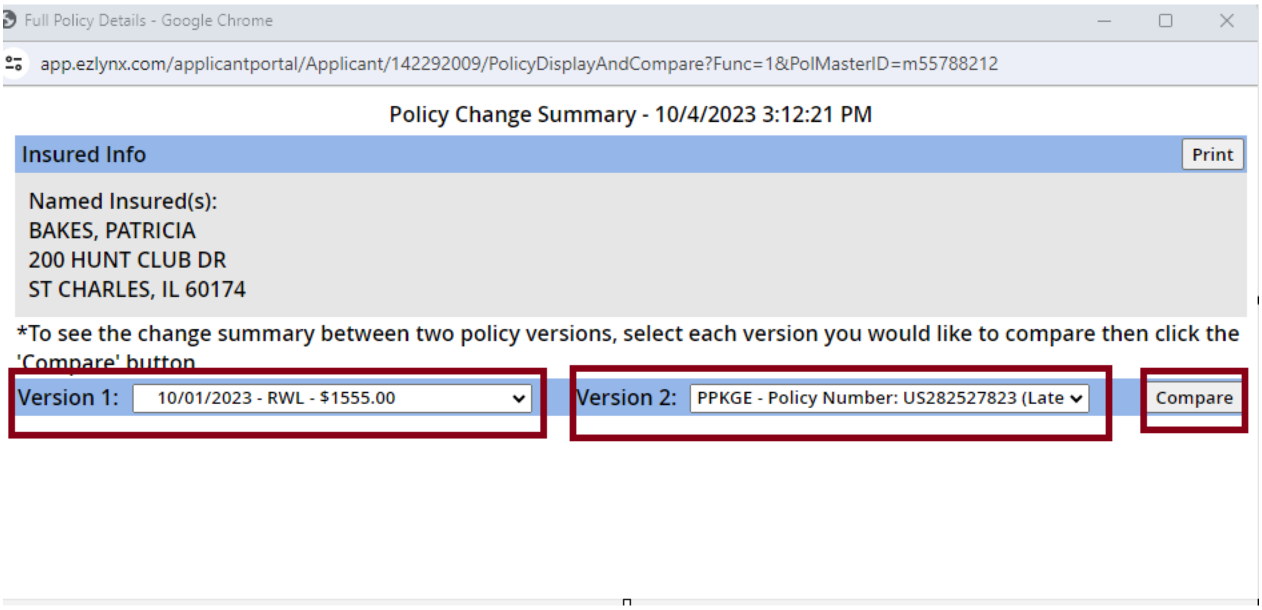


4 Confirm Policy Versions and Click Compare

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

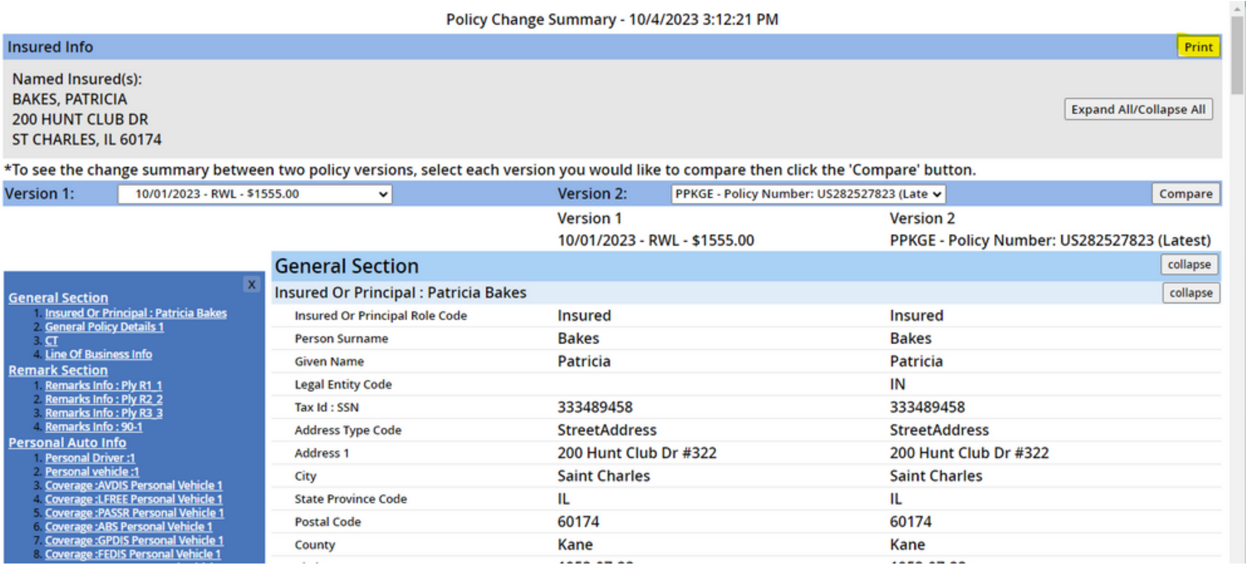
Version 2 is the Latest Version of the policy, including any changes made throughout the policy term.

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



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.



6 Distribute Summary or Attach to Client in EZLynx

☐

7 End

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EZLynx - Create Renewal Applications

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.

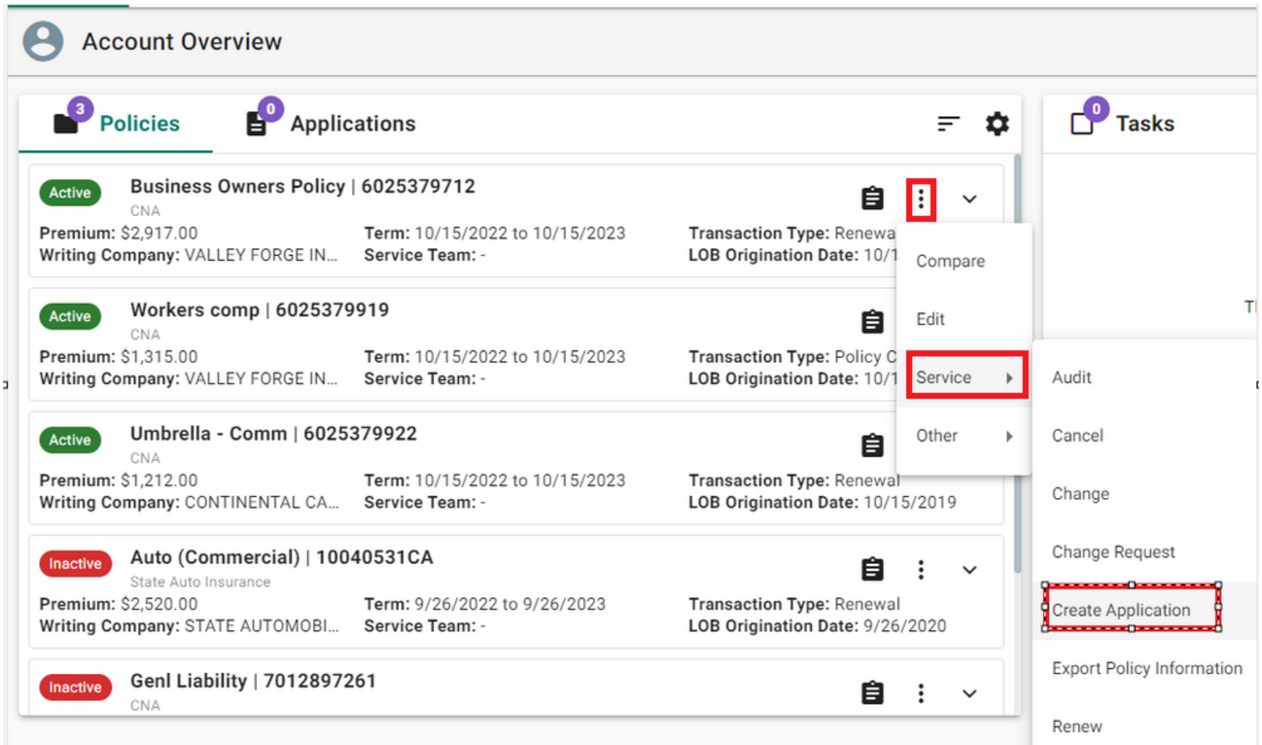
JOB ROLE/RESPONSIBILITY: ACCOUNT MANAGER/CSR

1 Go to Customer Account in EZLynx

2 Locate Policy Header Renewing and Create Application

From Account Overview Screen:

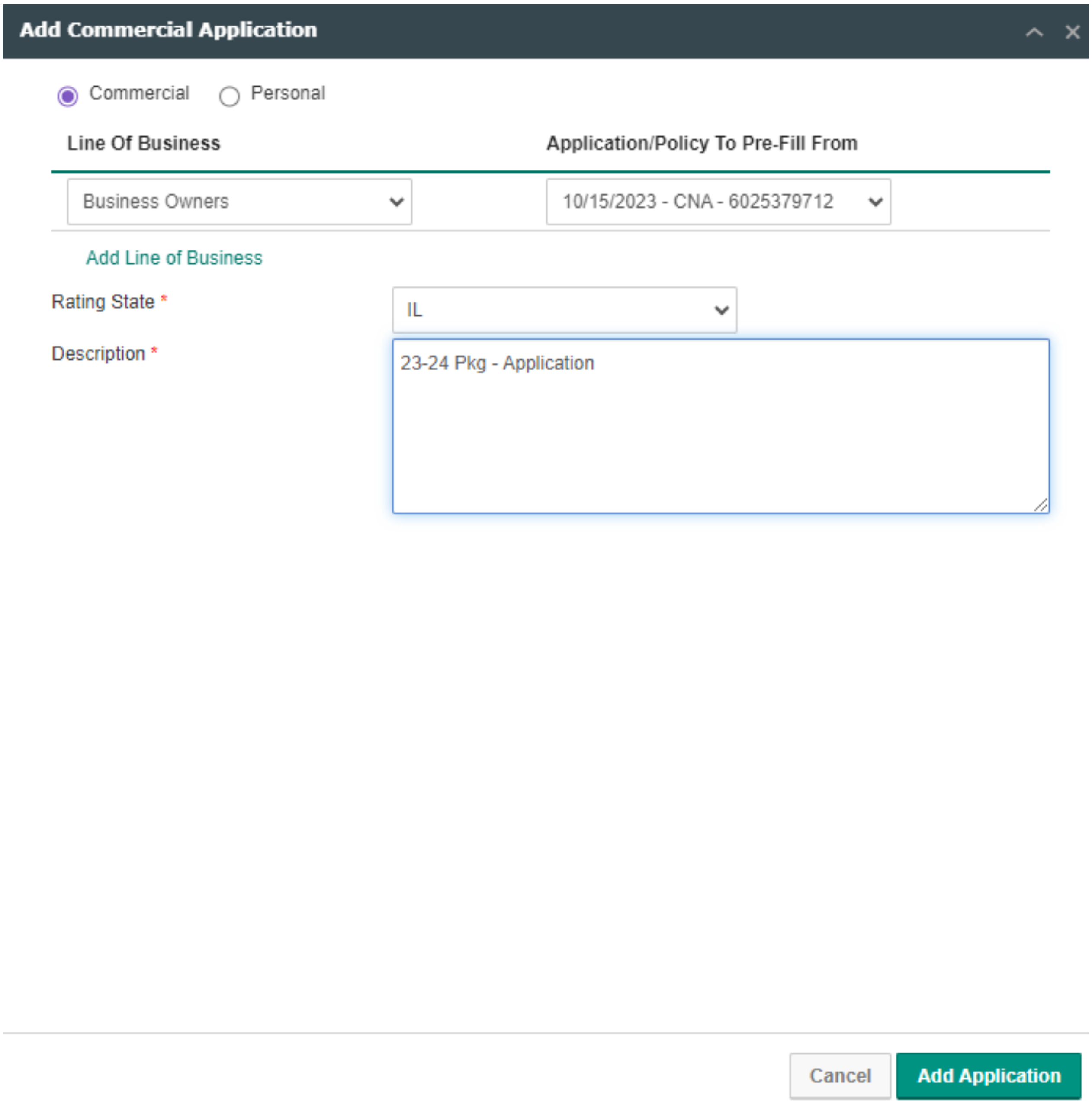
1. Click on Actions icon (three dots)
2. Select **'Service'**
3. Select **'Create Application'**



3 Add Commercial Application

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

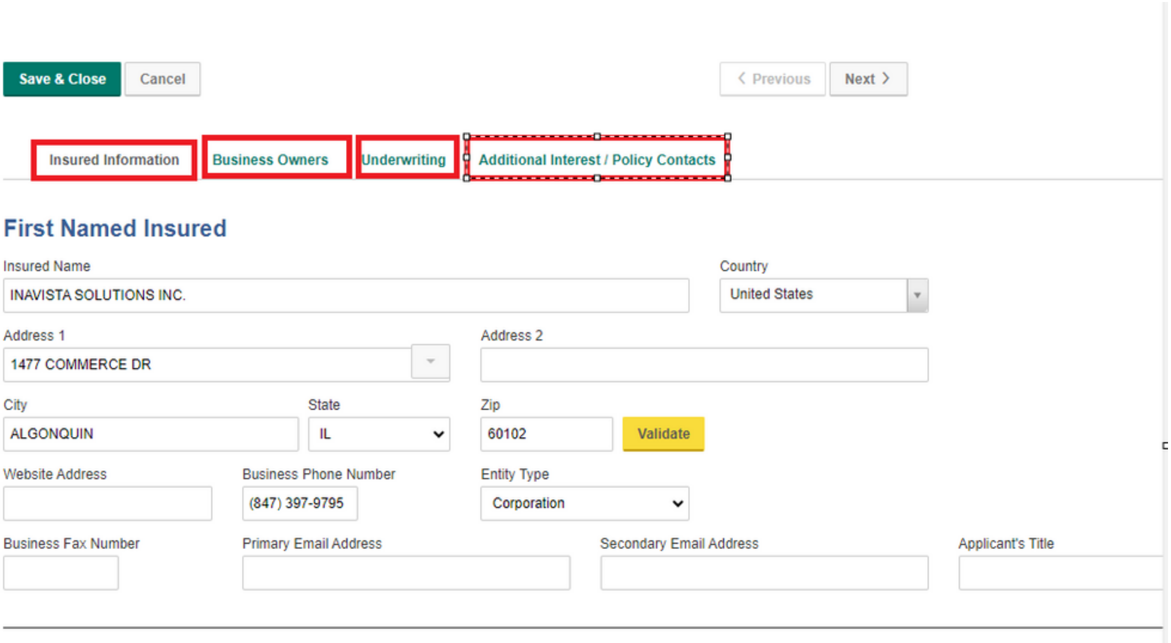
1. Enter a description using the approved naming conventions: **YY-YY LOB - Application**
2. Click '**Add Application**'



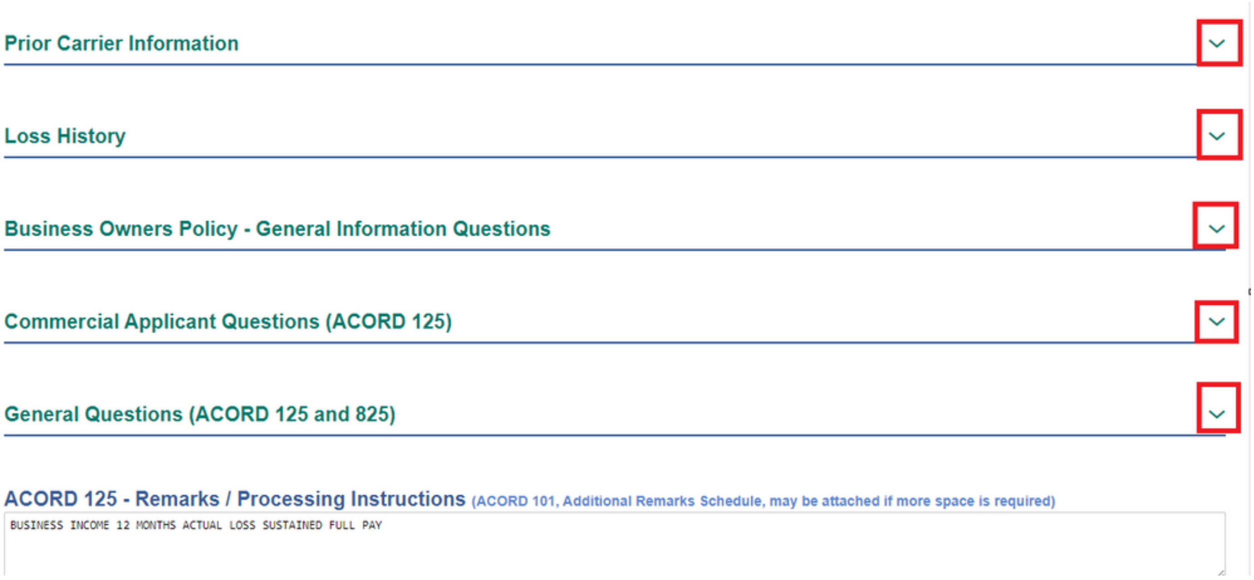
4 Review, Enter or Update Application Tabs

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

2.



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



5 Add Additional Interests and Inspection Contacts

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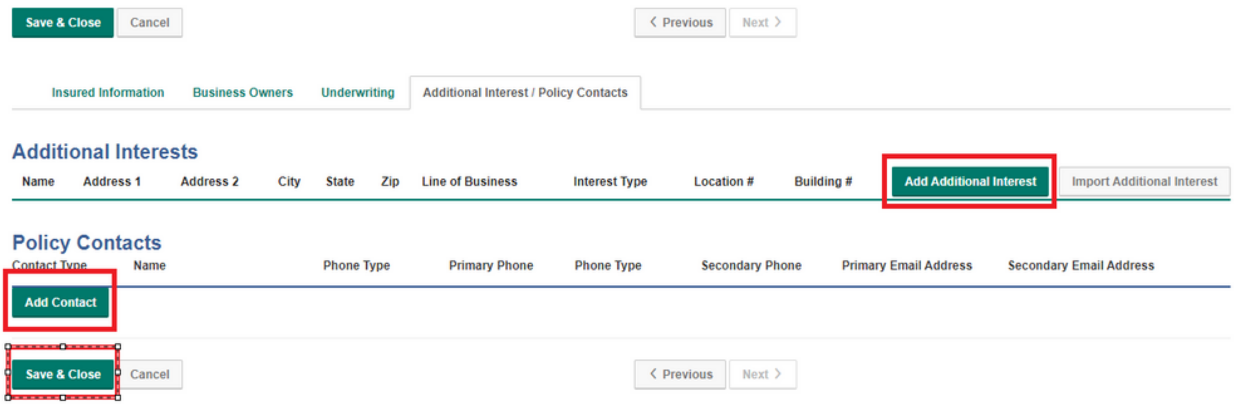
1. Add any Additional Insureds such as Landlords, Mortgagees or others that may require a scheduled endorsement. This will also help to populate COI's

2. Populate Inspection Contacts and Accounting Contacts. This is for carrier inspection and/or final audit purposes, as applicable.

3. Click 'Save and Close'

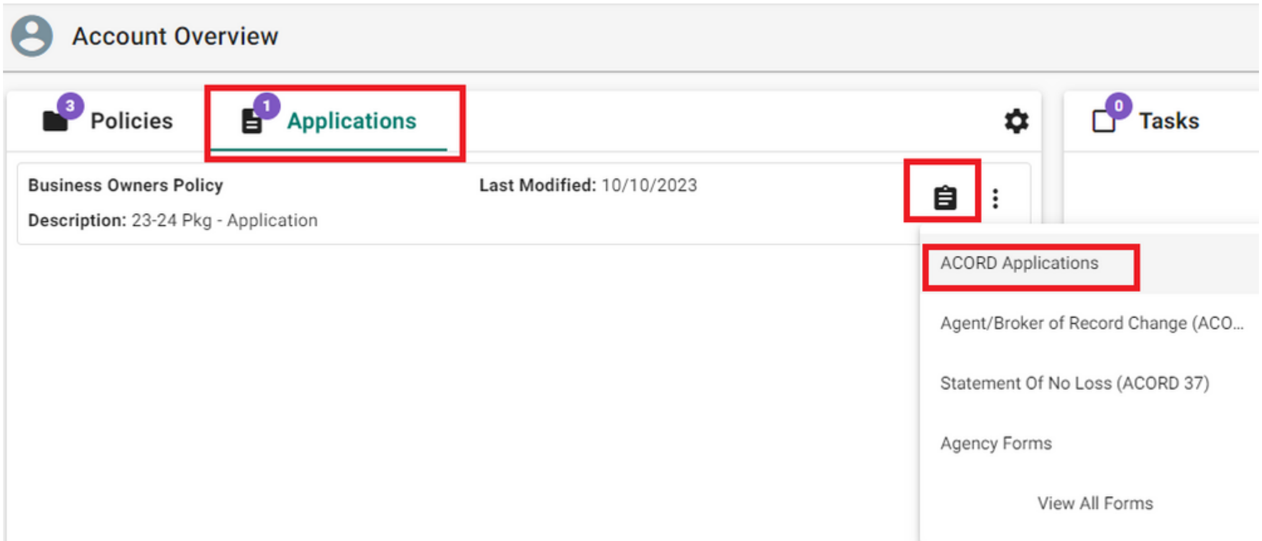


6 Create Application

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**



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

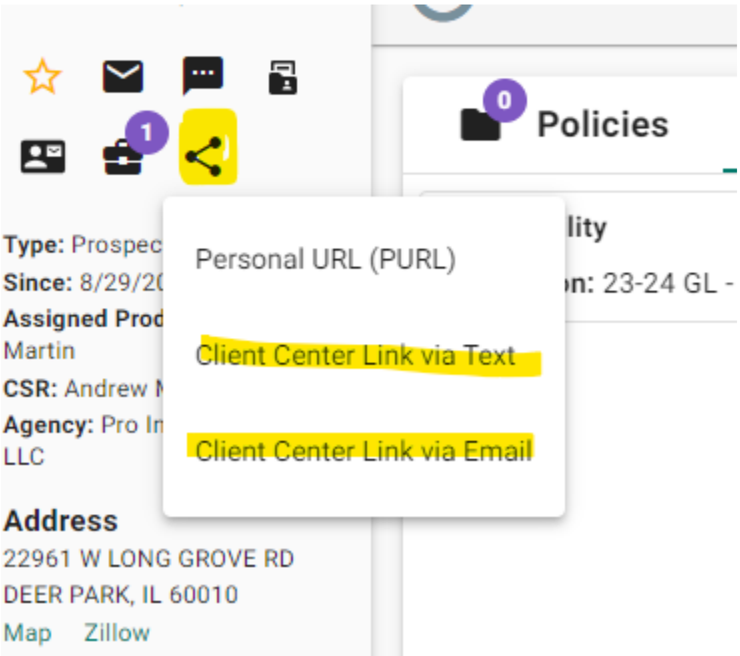
1 Share Client Center Link

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.**

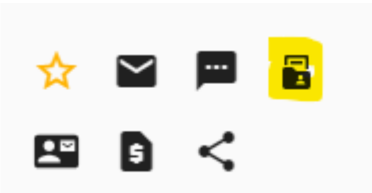
You can manually send the link by clicking the "Share" icon and choose whether to send the link by Text or Email to the client.

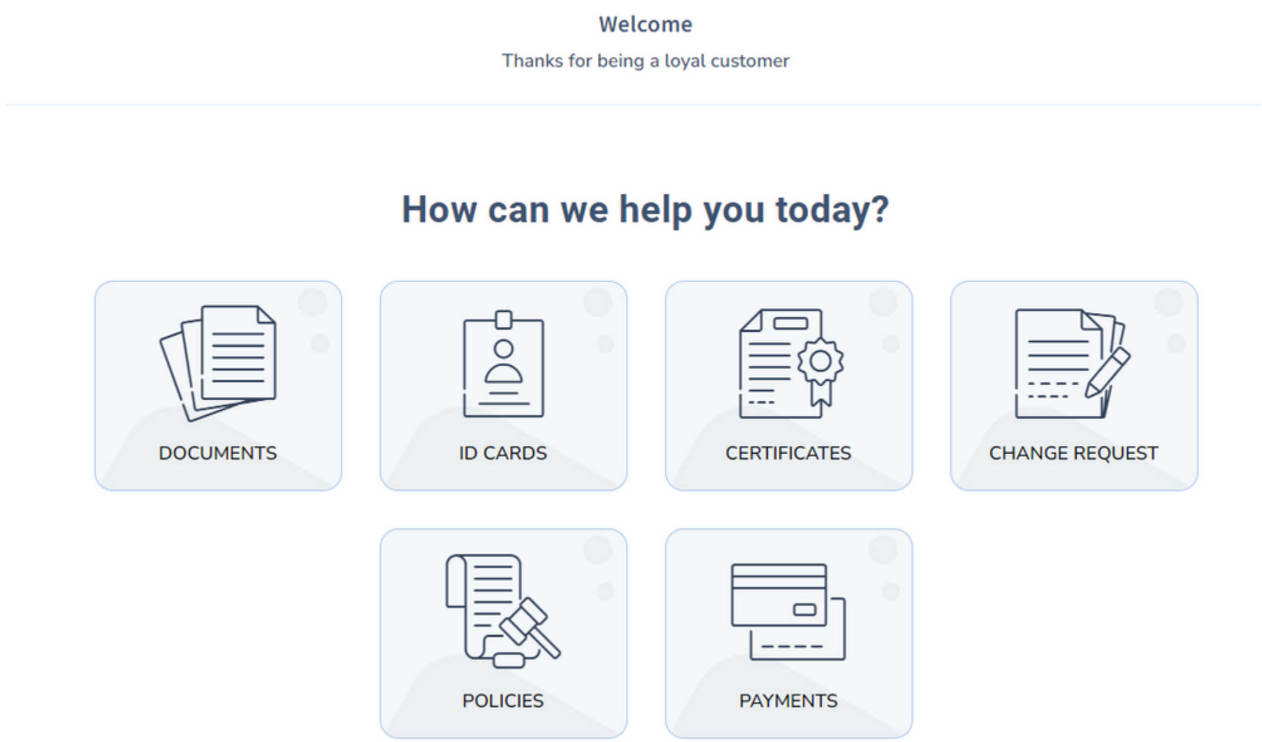
The client will receive the link be asked to input their email address and zip code for verification purposes vs creating credentials.



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





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:

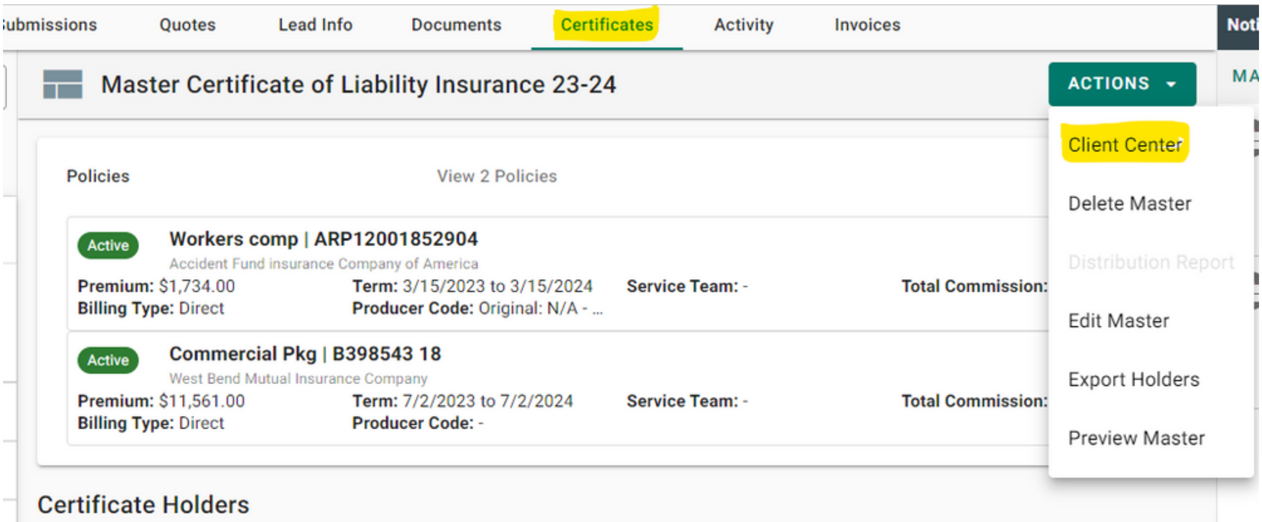
1.) Master Certificate Set has already been created

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.**

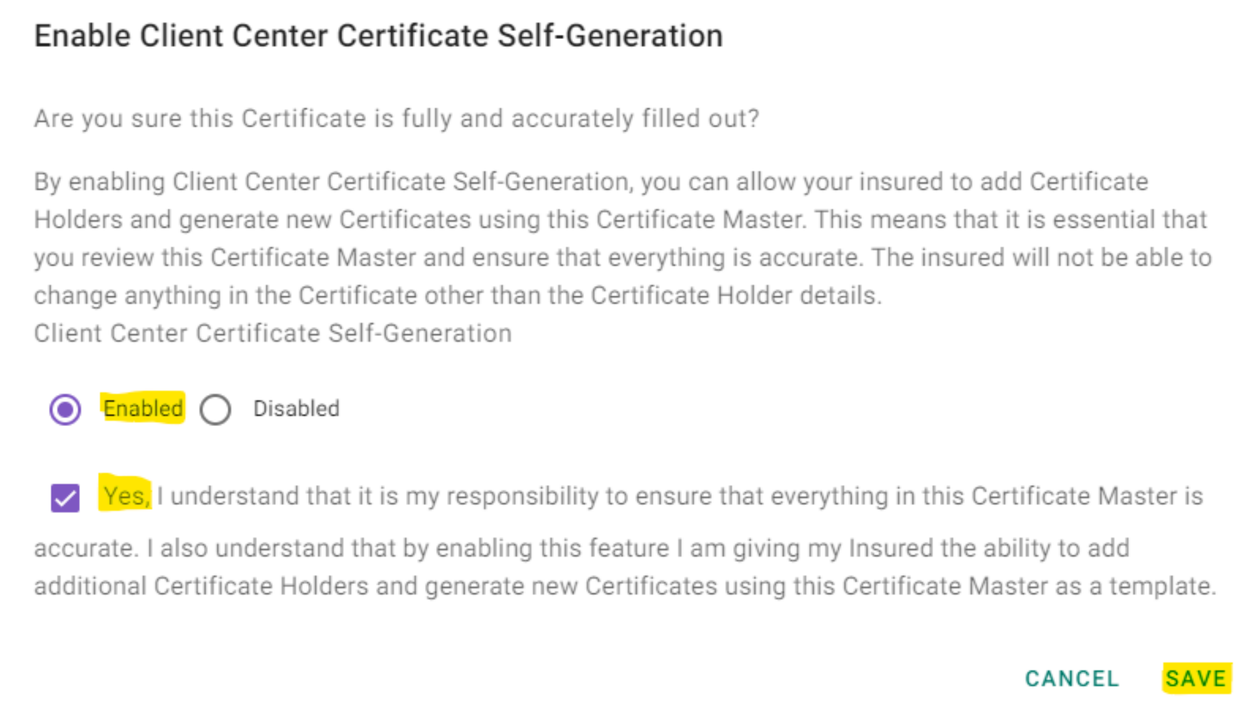
1. Go to Client Account
2. Click on 'Certificates' tab
3. Click green 'Actions' button
4. Select 'Client Center'



e. Click 'Enabled'

f. Check Acknowledgement Box

g. Click '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

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]

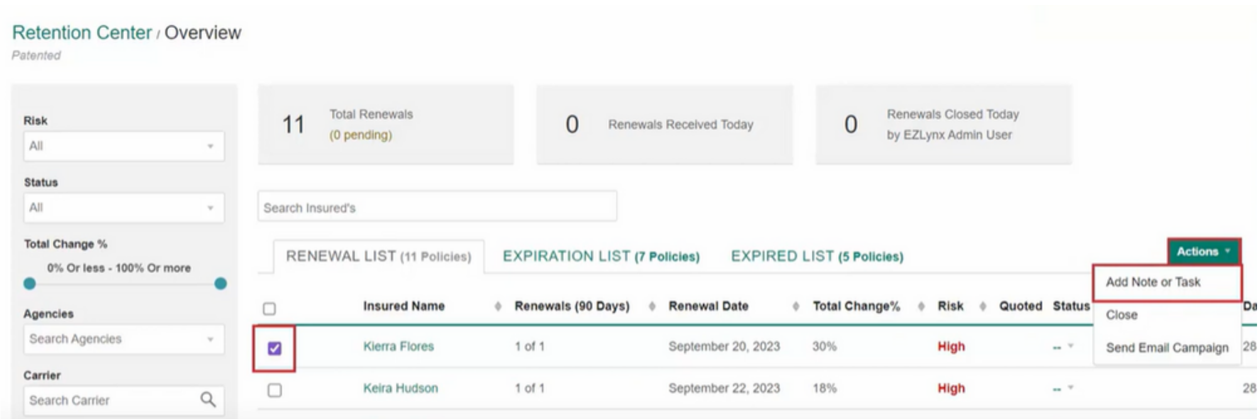
1 Creating a Note or Task

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



2 Send Email Campaign

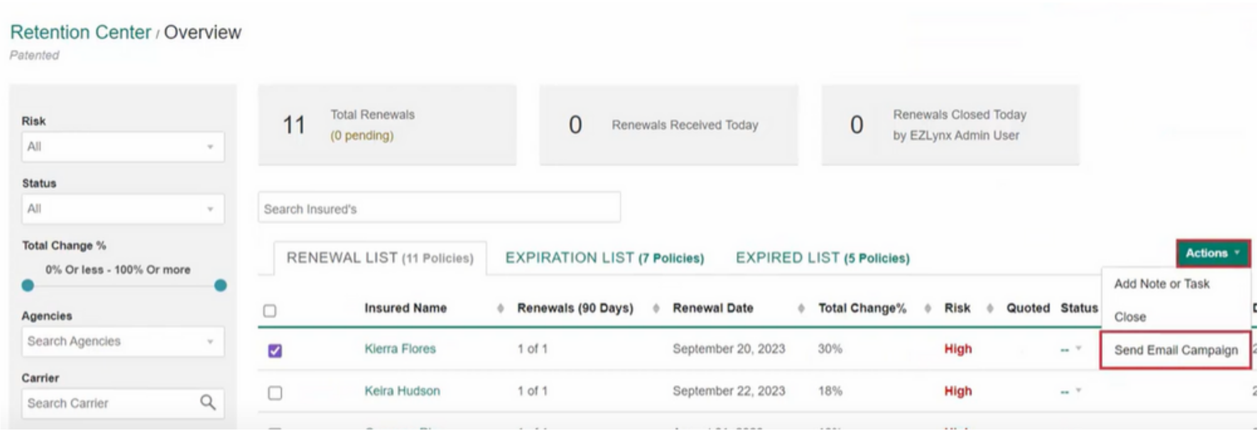
You can schedule an email campaign or send email to client utilizing a template created within EZLynx. You do not want to use this feature to send a customized email

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



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.

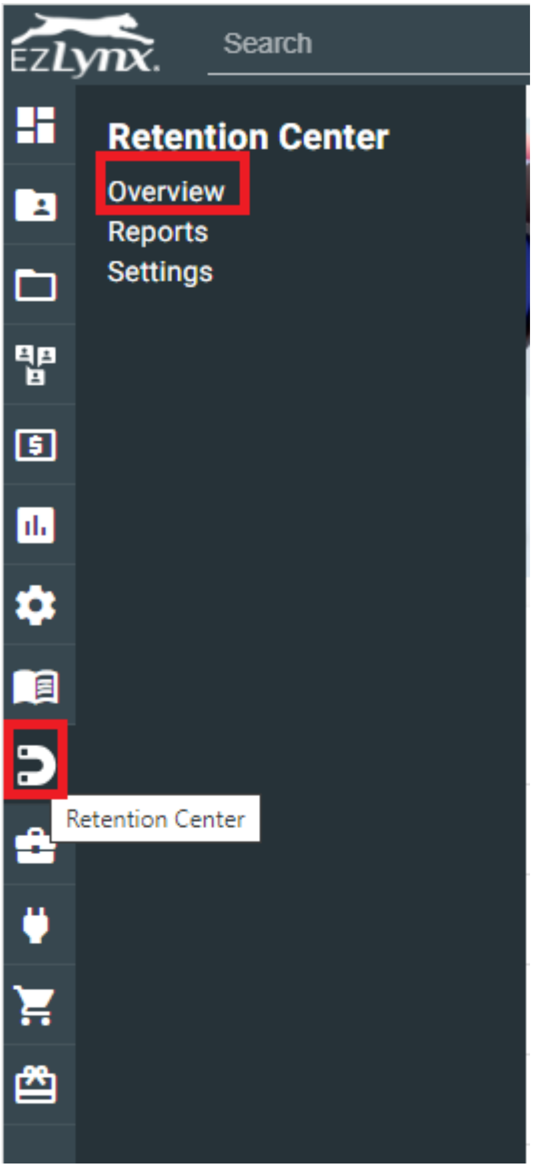
FBSPL keeping u first

EZLynx - Retention Center: Create Difference Report

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

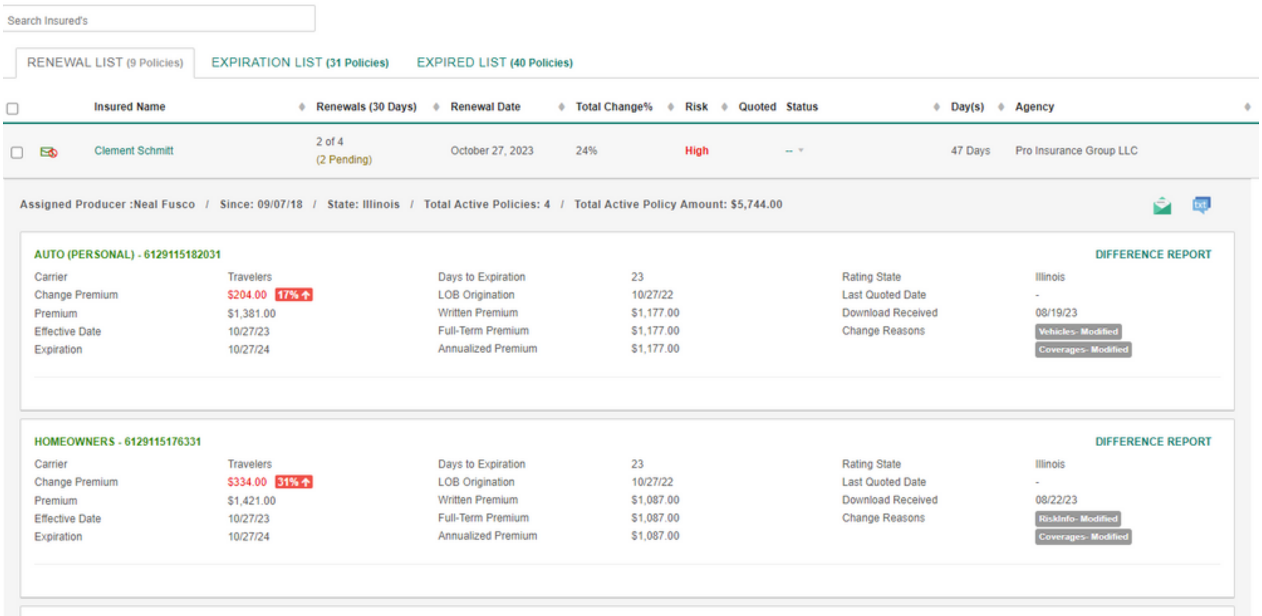


2 Locate Client on Renewal List

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

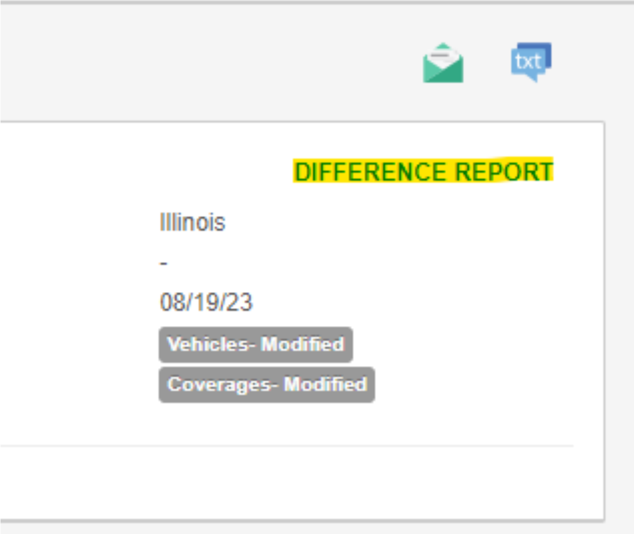
Click on the space next to client name to expand and review renewal terms issued

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



3 Create Difference Report

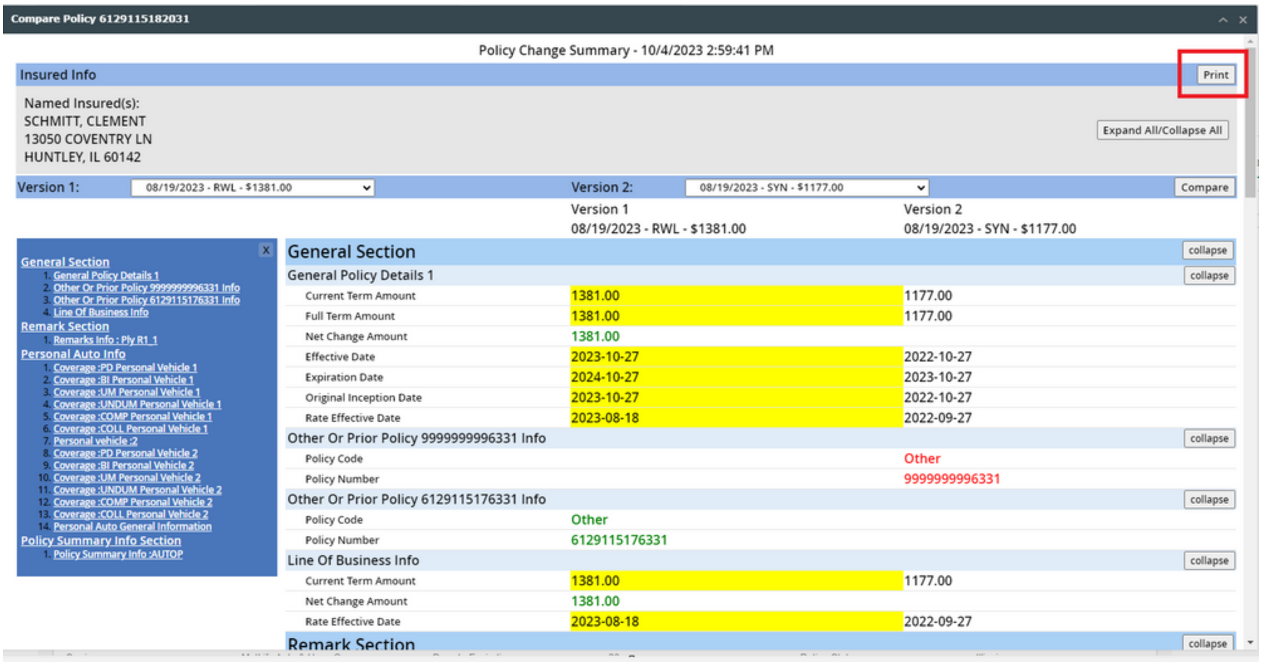
In order to review and compare all changes made from a client's existing policy vs renewal terms offered, click 'DIFFERENCE REPORT" to generate a summary of all changes to client coverages and premiums.



All Changes will be highlighted in Yellow

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



5 Distribute Report and/or Attach in EZLynx

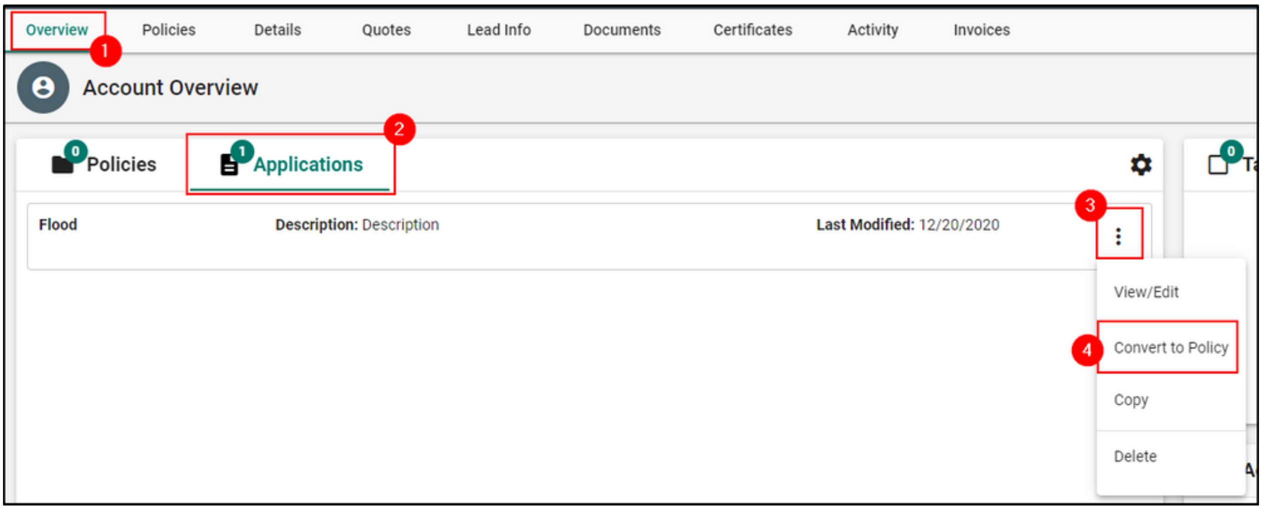
From here, you can email the report to the Producer as part of the pre-renewal process, send to client if they requested, or simply attach to client account in EZLynx as a future reference.

EZLynx - Converting an Application to a Policy

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 ne policy.

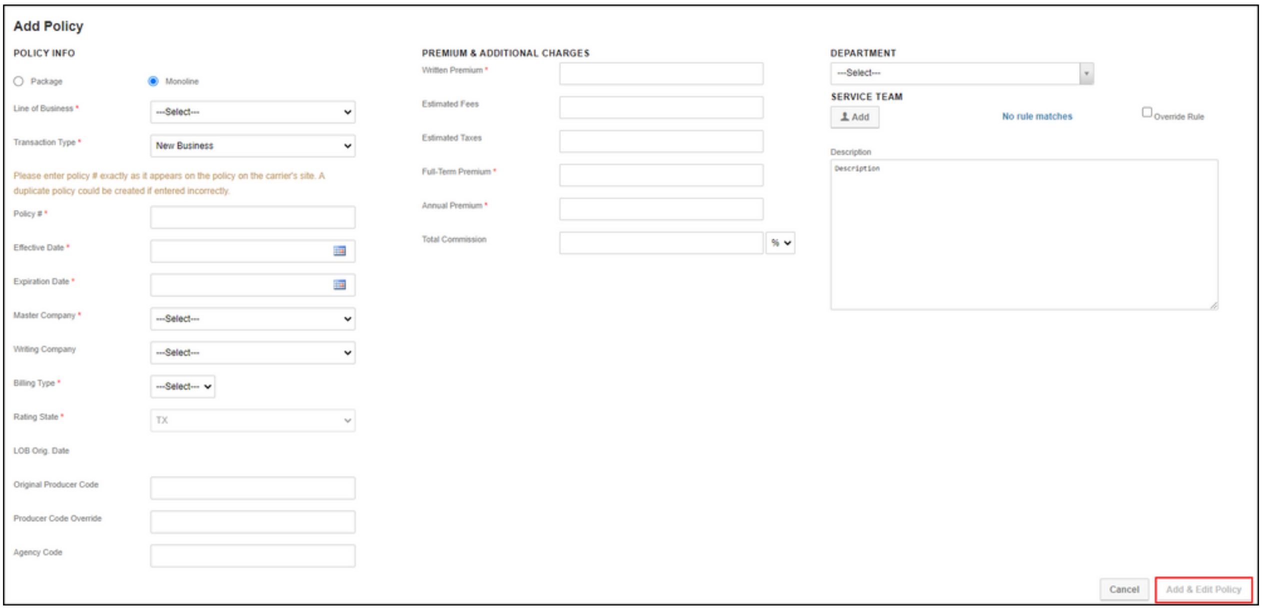
1 Convert Application to Policy

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

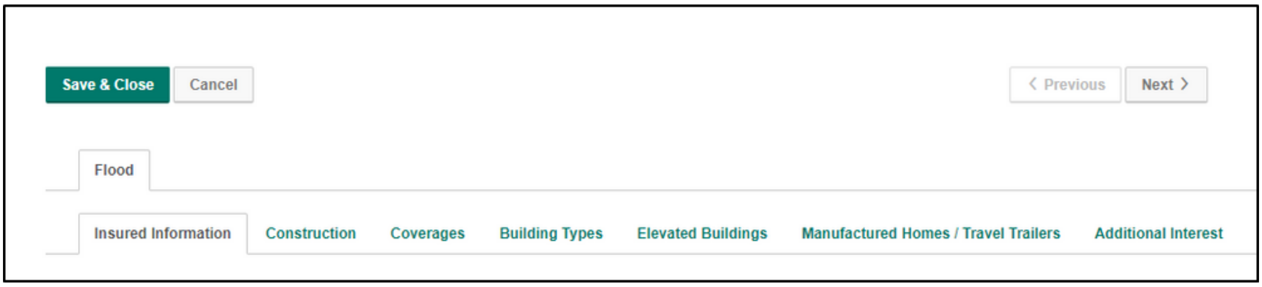
1. Enter Policy Number
2. Choose Effective Date
3. Choose correct carrier u/w company
4. Specify Direct Bill vs Agency Bill
5. Complete Premium and Commission
6. Add Policy Description
7.



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"



4 End

EZLynx - Adding Master Carrier or Underwriting Companies (Admin)

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]

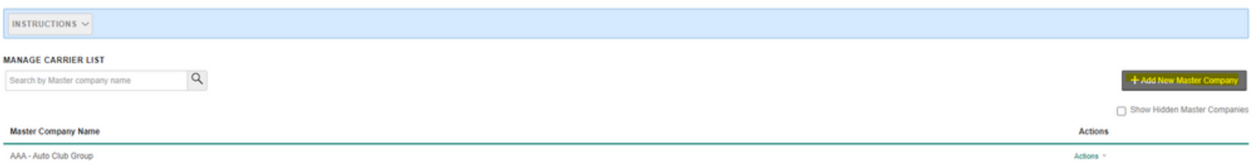
1 Go to Manage Carriers/Markets

From EZLynx Home Dashboard:

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

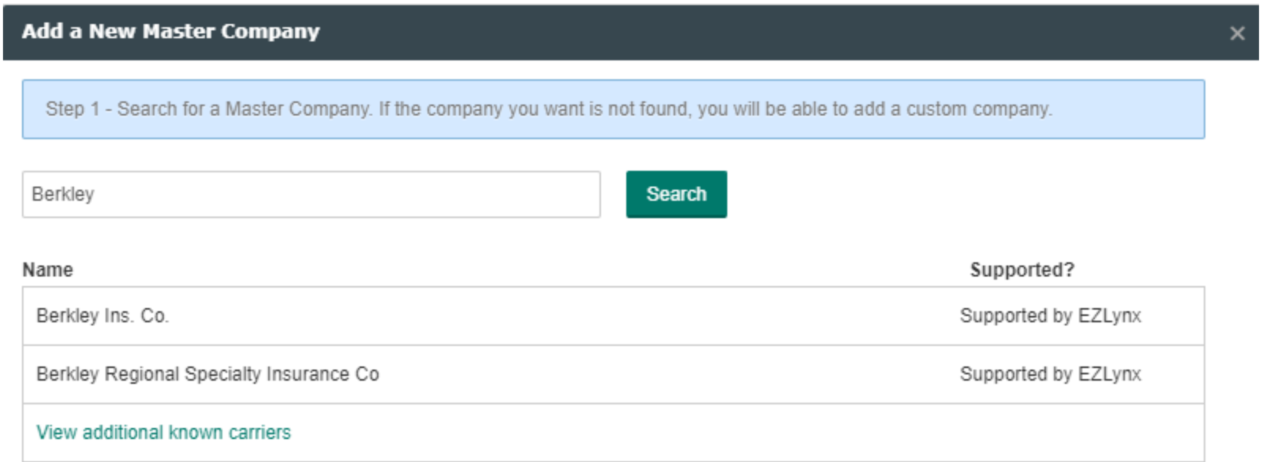
2 Add New Master Carrier/Company

Click on "Add New Master Company" Icon



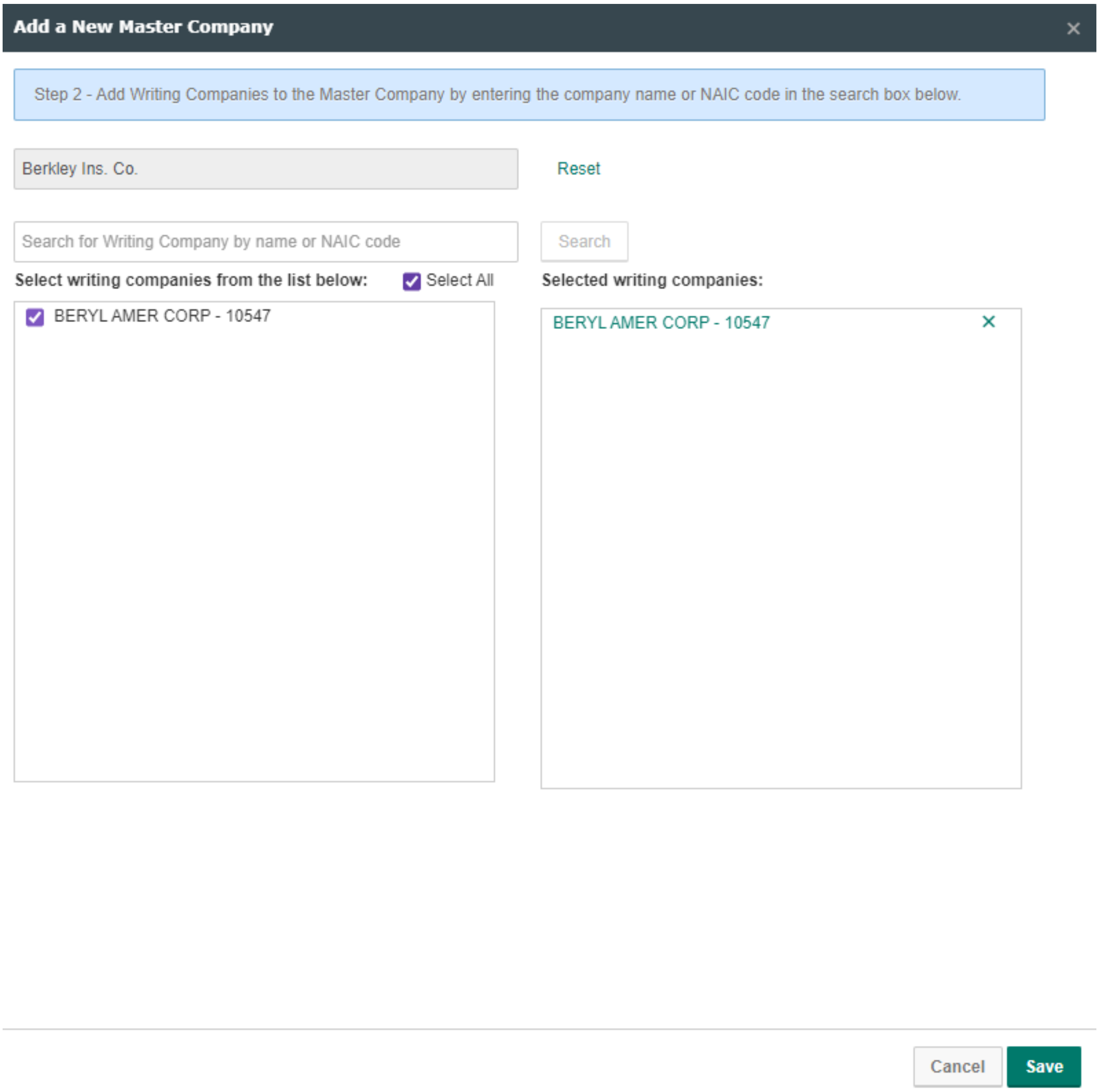
3 Add Master Carrier

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



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



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

☐

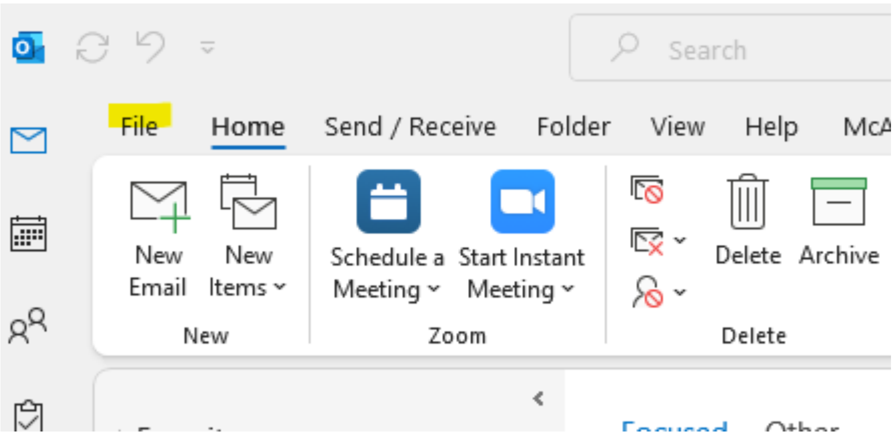
EZLynx - Outlook Add-In

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



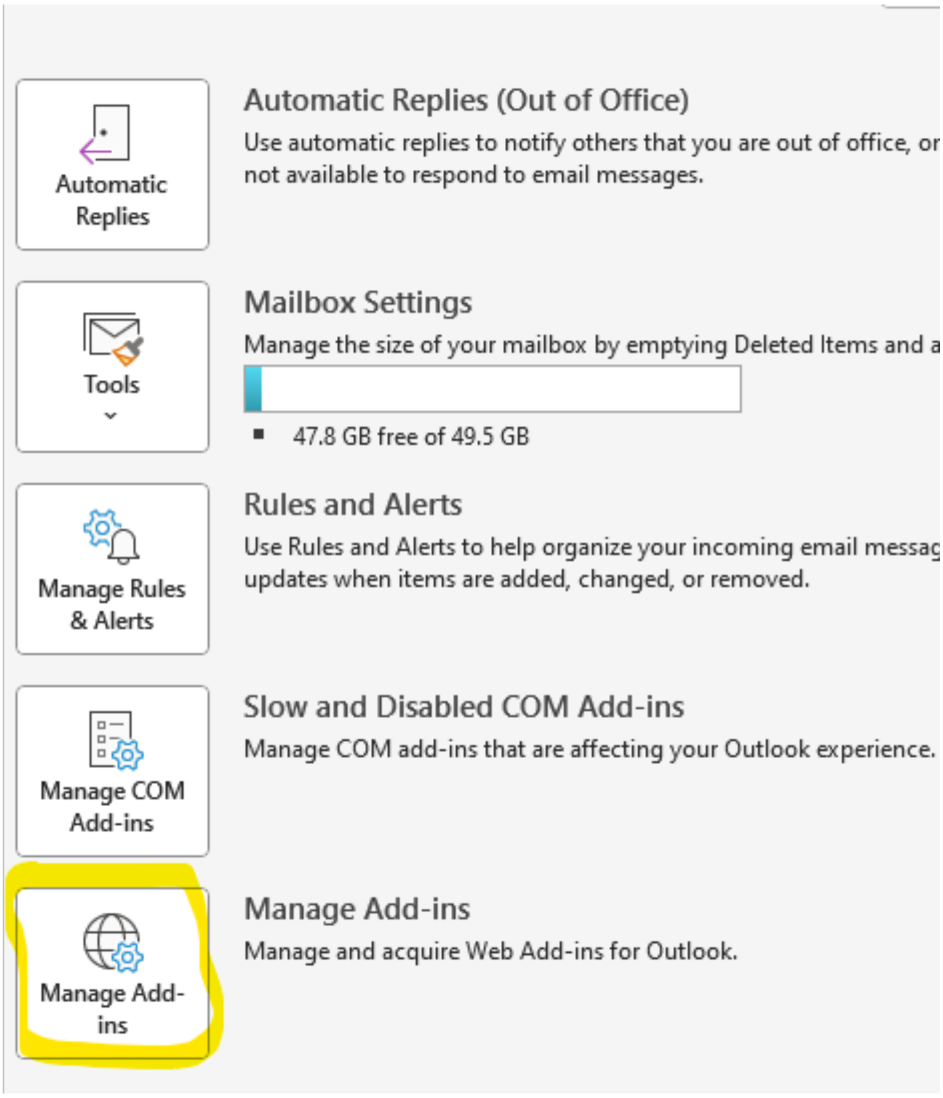
Click on 'EZLynx' in the add-ins list.

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"



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.

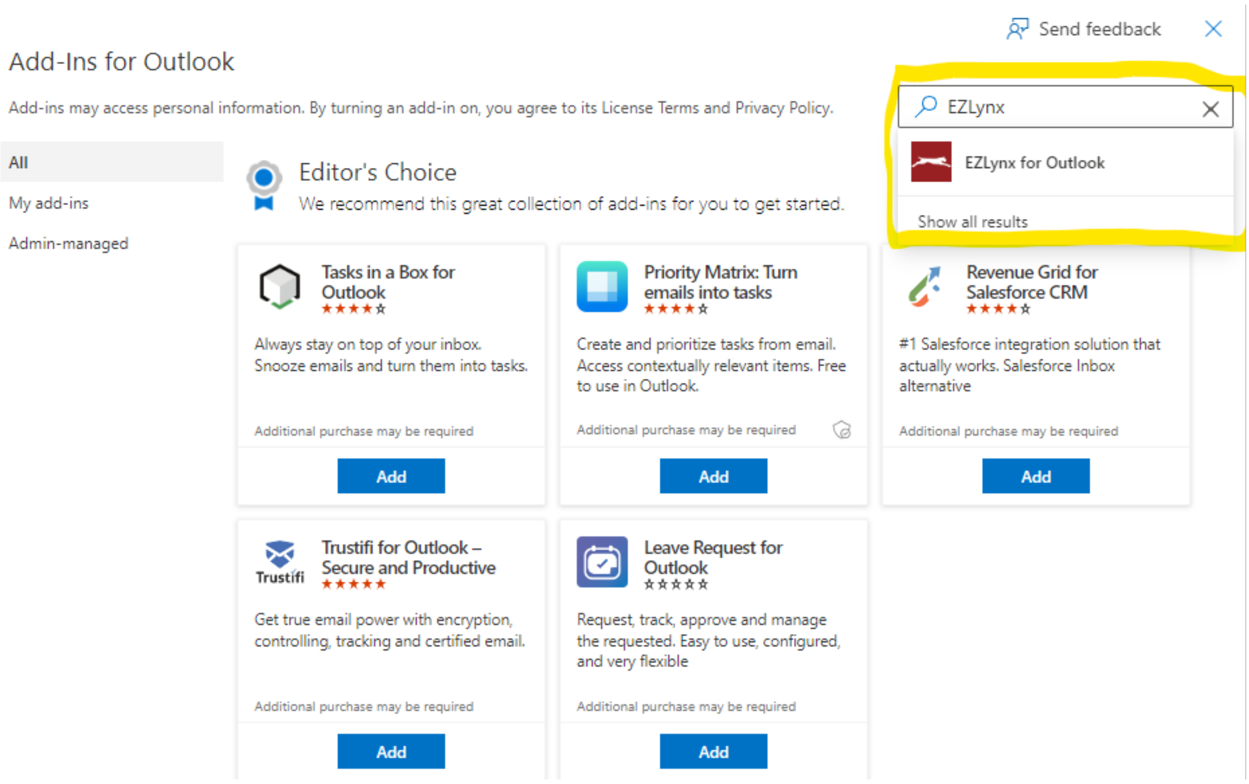
Use the available options and features in the sidebar to interact with EZLynx directly from Outlook, such as accessing customer information, sending quotes, or viewing policy details.

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

4 Enter your Outlook Credentials

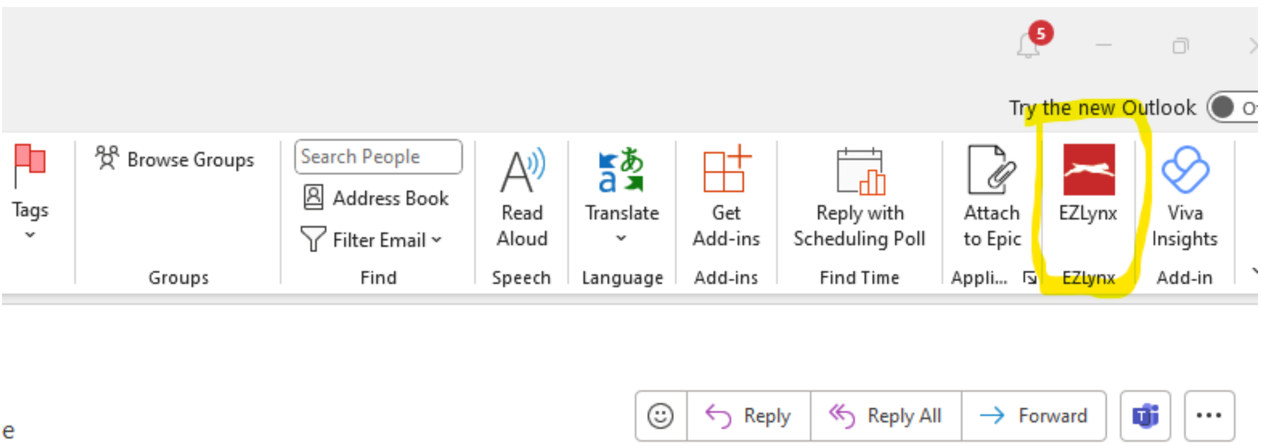
Outlook will open in your browser and ask for your log-in credentials. Enter them.

5 Search for EZLynx for Outlook and Click Install



6 Close and Restart Outlook

7 EZLynx Add-In Will Display in Outlook



8 End

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EZLynx - Creating a New Prospect - Personal Lines

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

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EZLynx - Creating a new prospect - Commercial Lines

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

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EZLynx - User Interface Basics

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

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

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

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.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

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

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

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EZLynx - Login Page & 2-Factor Authentication Setup

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

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

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)

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

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

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

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

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 Comnmercial Lines Submission

EZLynx - Updating Submissions - Commercial Lines

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

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

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

EZLynx - Create Manual Policy

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

Click here for tutorial: Creating Master Certificate Set

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

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)

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

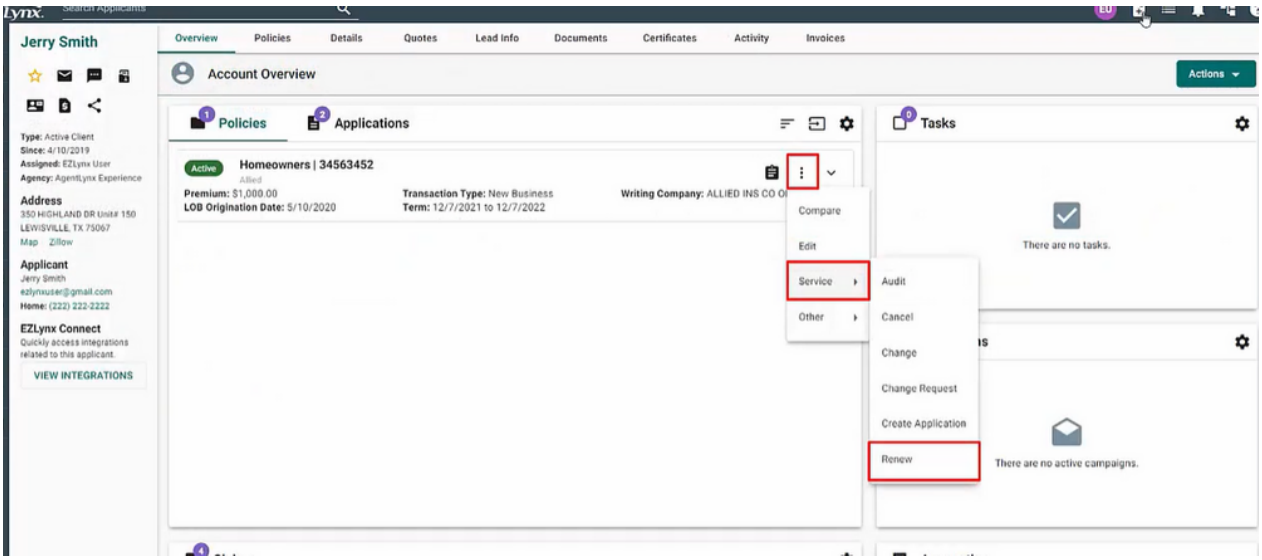
All carrier submissions should have their status as Declined or Quoted.

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

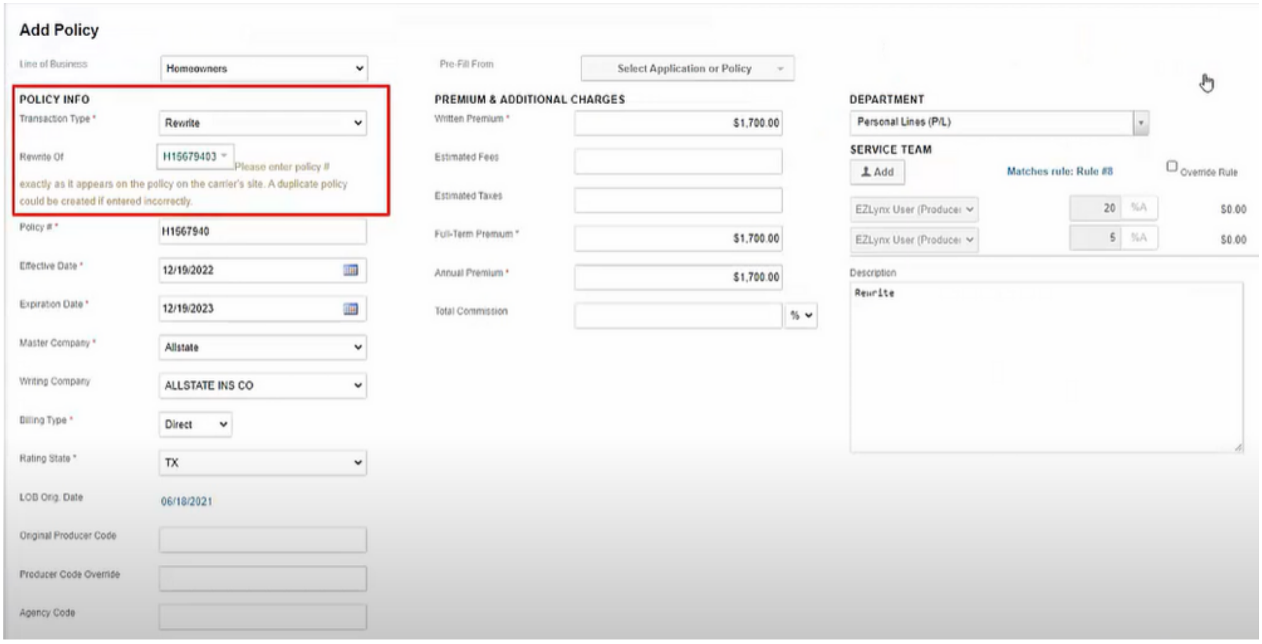
1. Go to policy header and Click on Actions tab
2. Select "Service"
3. Select "Renew"



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



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)

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 neededEZLynx - Converting an Application to a Policy

4 Update Policy Screen

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

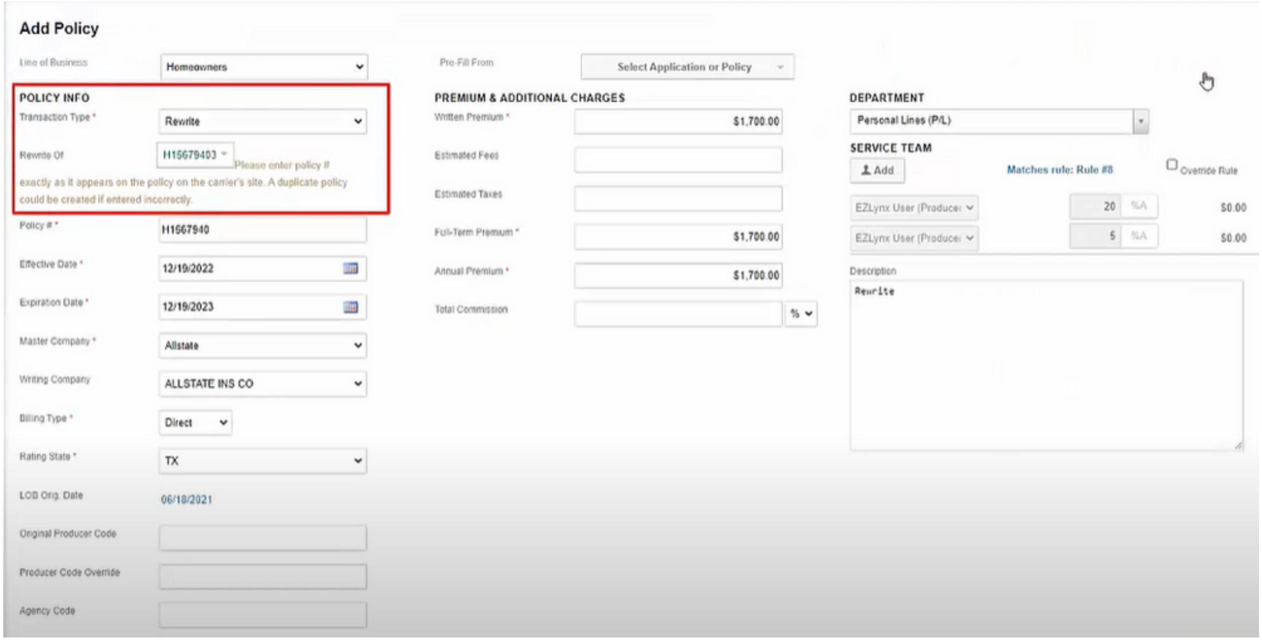
1, Change Policy Transaction Screen shows "Rewrite" and not New Business.

*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

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