



What is EZLynx Consumer Quoting?

EZLynx Consumer Quoting gathers lead information from an agency's website; consumers visiting the site can complete a rating application and submit it for a quote. The submitted application automatically creates a new applicant in the agency's EZLynx account. This eliminates the need to collect data manually.

Which Version of Consumer Quoting is My Agency Using?

Knowing which version of CQ your agency has is important for the proper setup and management of your Consumer Quoting product.

We offer 3 versions of Consumer Quoting: Basic CQ, CQLive or Enhanced Consumer Quoting (ECQ). If you're unsure about which version your agency purchased, contact [your sales rep](#) or cqsupport@ezlynx.com.

1. BASIC CQ

CQ collects lead data without providing instant quotes.

2. CQLIVE

CQLive allows agency website visitors to receive instant quotes.

Basic CQ & CQLive Features

- New applicants automatically created in agency's EZLynx account.
- CQ portal customized with agency logo.
- Assigned agent receives lead notifications via email.
- CQ Mobile included.
- iFrame support.
- Client Center add-on available to EZLynx Management System agencies.

3. ENHANCED CONSUMER QUOTING (ECQ)

ECQ is Basic CQ or ECQ, but with many additional features.

ECQ Features

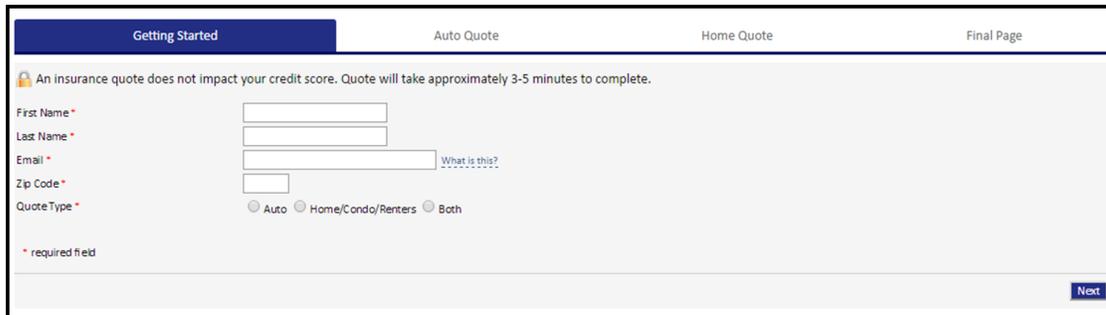
All features for basic CQ or CQLive, PLUS:

- Defaulted coverage baskets to shorten quoting process and reduce drop-offs.
- Vehicle pre-fill (LexisNexis).
- Automatic drop-off campaign for incomplete applications. Lead invited to return and complete application.
- Export incomplete leads into EZLynx.
- Portal customization available (fees may apply).
- Google Business Analytics.
- Facebook quoting.
- Leads can easily "tailor" coverages and re-submit for new quotes.

How do I setup Consumer Quoting?

If you have an EZLynx Agency Website, we setup Consumer Quoting for you. If your website is supported by a provider other than EZLynx, we provide a link to embed in your agency's website as a "Get a Quote" button. You can do this yourself, have an IT person or your website host complete the task.

When a consumer clicks the “Get a Quote” button, they are prompted to complete a rating application. The form displays the agency’s logo and contact information. Or, when embedded in a frame, the form looks identical to the rest of the website.



The screenshot shows a web form titled "Getting Started" with tabs for "Auto Quote", "Home Quote", and "Final Page". A message states: "An insurance quote does not impact your credit score. Quote will take approximately 3-5 minutes to complete." The form includes fields for "First Name", "Last Name", "Email", and "Zip Code", each with a red asterisk indicating it is a required field. There is a "What is this?" link next to the email field. Below these fields are radio buttons for "Quote Type": "Auto", "Home/Condo/Renters", and "Both". A "Next" button is located at the bottom right of the form.

CQ links can also be pasted into the body of emails and/or incorporated into email signatures – so prospects can quote directly from emails.

What happens after a consumer submits a rating application via Consumer Quoting?

Consumers complete their own auto and/or home application for mono-line or package quotes. When the consumer clicks “Submit”, an agency has two options regarding what happens next:

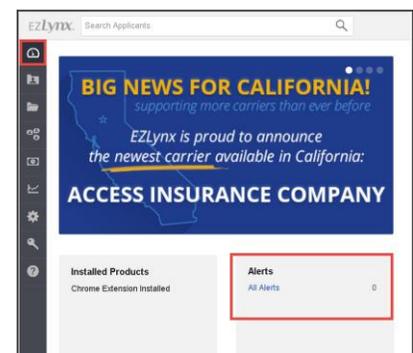
1. **Consumer Quoting (CQ)** - the consumer receives a “thank you” message stating an agent will contact them shortly with a quote.
2. **Consumer Quoting Live (CQLive)** – the consumer receives an instant live quote from multiple carriers and email their preference to the agent from the quote.

How do I know when a lead is obtained via Consumer Quoting?

EZLynx sends an email and creates an alert when a consumer submits an application via Consumer Quoting. Alerts are found on the EZLynx Home Page.

Who receives the email and alert for new CQ leads?

During setup, one EZLynx user is designated as the Consumer Quoting Admin. The Admin receives an email and alert each time a consumer submits a rating application via Consumer Quoting. To add/remove/change who receives CQ emails and alerts, use the CQ Self Admin feature or contact cqsupport@ezlynx.com.



How do I locate a Consumer Quoting lead in EZLynx?

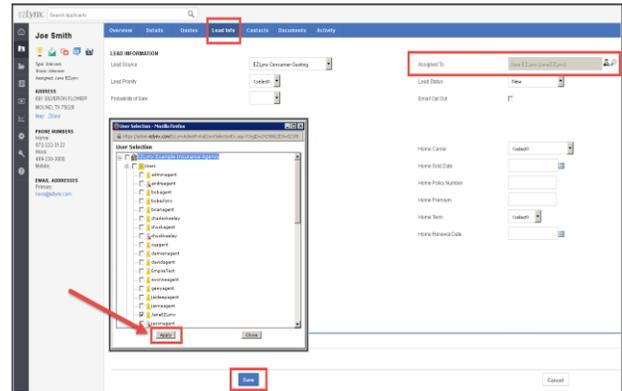
The emails and alerts include a link to the applicant account in EZLynx. Or, simply type the lead’s name in the applicant search box at the upper left of all EZLynx screens.

Which EZLynx user is assigned to leads obtained via CQ?

During setup, one EZLynx user is designated as the Consumer Quoting Admin. This admin is automatically assigned to ALL leads received via Consumer Quoting. The Assigned user is displayed on the upper left of an applicant’s account.

To change an applicant's Assigned user:

- Go to the applicant's **Lead Info** tab.
- Click **Edit** at the bottom of the page.
- Click the **people icon** on the right of the Assigned To field.
- **Uncheck the user currently assigned, and check the user to re-assign.**
- Click **Apply**, then **Save**.



If a CQLive quote fails with a login error, how do I fix it?

To provide live quotes via your website, the CQ Admin's carrier logins MUST be kept up-to-date.

To set or update CQLive carrier logins:

- Log into the **CQ Admin's EZLynx account**.
- Hover over the **Settings icon**, and select **Carrier Quoting Setup**.
- At **My Carrier Logins**, click **Set Login** for each carrier. Make sure the usernames and passwords are kept up-to-date. **EVERY TIME A LOGIN IS UPDATED ON A CARRIER SITE, IT MUST BE UPDATED IN EZLYNX.**

What is CQ Self Admin?

[Watch the 3-minute CQ Self Admin video](#)

CQ Self Admin allows the admin to add and remove carriers for CQ quotes, change the designated CQ Admin, set CQ defaults, and more. To access, hover over the Settings tab, and select Consumer Quoting.

Questions? Contact cqsupport@ezlynx.com.