



What's New in EZLynx 4.16.08

September 1, 2016 Release

CONTENTS

CLIENT CENTER CERTIFICATE SELF-GENERATION	2
Email Notification Preferences (Self Admin).....	2
Enable Certificate Types & Carriers (Self Admin).....	2
Enable a Certificate Master.....	3
Agency Customer –Generate Certificate	4
POLICY TRANSACTIONS PAGE UPDATE	4
Highlights.....	5
New Actions Button	5
New Filter Panel	6
Unmatched Transactions Tab	6
NEW QUOTE PROPOSALS FEATURE (BETA)	8
Multiple LOB Proposal.....	8
Coming Soon	9
ESIGNATURE PAY-PER-USER OPTION	10

As always, we have been busy improving our products and features for an amazing EZLynx experience. With 4.16.08, we have gone the extra mile and are rolling out many valuable product enhancements.

Highlights

- Client Center Certificate Self-Generation
- Policy Transactions Page update
- Improved Unmatched Transactions workflow
- New Quote Proposals feature (BETA) [Request BETA access here.](#)
- eSignature Pay-per-User

CLIENT CENTER CERTIFICATE SELF-GENERATION

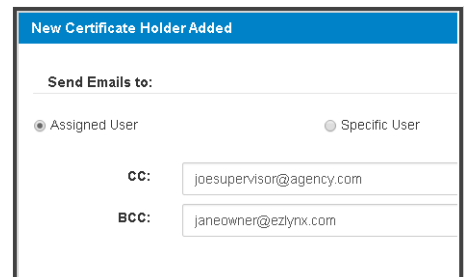
For agencies that spend a lot of time creating certificates, this is a great new enhancement that allows agency customers to generate their own certificates from their Client Center account.

Email Notification Preferences (Self Admin)

By default, the user Assigned to the applicant in EZLynx is sent an email for Client Center activities. We recommend adding at least one additional email to receive notifications in order to avoid tasks falling through the cracks; for example, if the Assigned to user is absent or leaves the agency. The copied person can assure that Client Center requests are reassigned or completed.

An admin can update **Email Notification Preferences** for Certificate Self-Generation:

1. Hover over the **Settings** icon, select **Client Center**.
2. Click **Email Notification Preferences** tab.
3. Scroll down to **New Certificate Holder Added**.
4. Set who will receive an email whenever a customer adds a New Certificate Holder to a Master Certificate in the Client Center.
 - Select either Assigned User or Specific User.
 - Add any additional emails in CC: or BCC: fields.
5. Click **Save Changes**.



The screenshot shows a form titled "New Certificate Holder Added" with a blue header. Below the header, there is a "Send Emails to:" section with two radio buttons: "Assigned User" (selected) and "Specific User". Below this, there are two text input fields: "CC:" with the value "joesupervisor@agency.com" and "BCC:" with the value "janeowner@ezlynx.com".

Enable Certificate Types & Carriers (Self Admin)

An agency admin decides which certificate types and carriers are available to agency customers for Certificate Self-Generation in the Client Center. Then, enable specific applicant's Certificate Masters with the feature.

1. Hover over the **Settings** icon, select **Client Center**.
2. Click **Certificates** tab.
3. At **Certificate Form Permissions**, go to right to **Enable** or **Disable**.
4. At **Carrier Permissions**, use arrow buttons to move **Available Carriers** to **Enabled Carriers**.
5. Click **Save Changes**.

(see screenshot on next page)

Certificate Form Permissions

Certificate of Insurance Form

ACORD 24 (2016-03) Certificate of Property Insurance	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
ACORD 25 (2016-03) Certificate of Liability Insurance	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
ACORD 30 (2016-03) Certificate Of Garage Insurance	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Carrier Permissions

Enabled Carriers

14354
416
>>
A Central Insurance Company
A-Central Auto Insurance Company
AAA - Auto Club Group
AAA Insurance
AAA Insurance - Western United
AAA MID ATLANTIC REINS CO
AAA SOUTHERN NEW ENGLAND INS CO

Available Carriers

>>
14354
416
A Central Insurance Company
A-Central Auto Insurance Company
A. J. Wayne & Associates (Prof Liab)
AAA - Auto Club Group
AAA Insurance
AAA Insurance - Western United
AAA MID ATLANTIC REINS CO

Enable a Certificate Master

By enabling Certificate Self-Generation, an agency customer can generate a new Certificate themselves. It's very important that the Certificate Master is reviewed for accuracy before enabling this feature. The customer cannot edit the certificate content, but only add the certificate holder details.

To enable a Certificate Master:

1. Go to the applicant's Documents tab.
2. Locate the Certificate Master, at the far right click Actions, and select Client Center.
3. Click on the Enable button.
4. Check box to accept responsibility.
5. Click Save.

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.

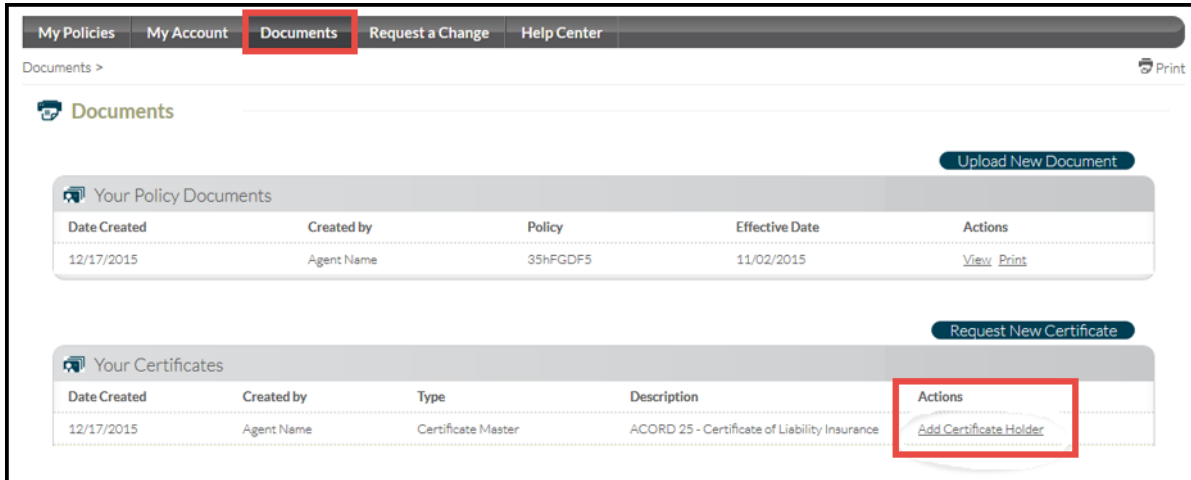
Client Center Certificate Self-Generation

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.

Agency Customer - Generate Certificate

1. Agency customer logs into Client Center.
2. Clicks **Documents** tab.
3. Locates the Certificate Master, and clicks **Add Certificate Holder**.



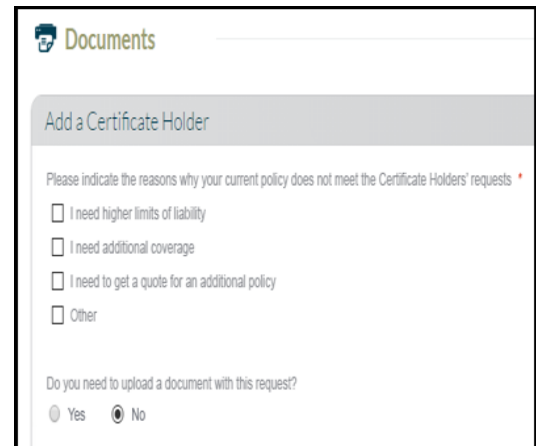
4. Enter certificate holder information.
5. At prompt asking if current policy meets the Certificate Holder's requirements:

If YES:

- The new Certificate is placed under the Certificate Master with holder's name in Description field.
- Customer can now click VIEW to access the Certificate.

If No:

- Customer is asked why their current policy does not meet the Certificate Holder's requirements, and can upload a document to accompany the Certificate Request.



POLICY TRANSACTIONS PAGE UPDATE

The Policy Transactions page has been given a facelift with a new look and enhancements for quick assessment and management of policy transactions. You can now delete unnecessary records too.

Our new unmatched policy tab provides intelligent suggestions for matching policies based on policy number, LOB, carrier, and applicant information. The new policy search allows you to promptly locate an applicant, match to an existing policy, or create a new one without leaving the page! One click and you can create a new applicant from information contained in the download. With the enhanced policy transactions page, managing carrier downloads is a breeze!

Highlights

- [View the EZLynx Policy Transactions Page Guide here](#)
- New Actions button
- Updated filter panel
- Unmatched policy transaction tab
- Simple search feature expedites matching and creating policies
 - Search applicants or policies
 - Create new policy or match to an existing one

New Actions Button

Perform 3 tasks with the new actions button:

- Export to Excel
- Edit Columns
- Select Transactions to Remove

➤ **Export to Excel**
By selecting Export to Excel, users can download their policy transactions list to Excel for better sorting.

Policy #	LOB	Trans Type	Type	Net Chg	Trans Date	Eff Date	Exp Date	Source	Premium
iuhaspdf	Auto (Personal)	New Business	Commercial	\$0.00	07/21/2016	07/04/1997	07/04/1998	Manual	\$1,000.00
iuhaspdf	Auto (Personal)	Policy Change	Commercial	\$100.00	07/21/2016	07/04/1997	07/04/1998	Manual	\$1,100.00
6549874987	Auto (Personal)	New Business	Personal	\$0.00	07/21/2016	02/01/2000	02/01/2001	Manual	\$1,000.00
6549874987	Auto (Personal)	Policy Change	Personal	\$100.00	07/21/2016	02/01/2000	02/01/2001	Manual	\$1,100.00
Poll435	Auto (Personal)	Renewal Image	Personal	\$0.00	08/19/2015	08/16/2000	08/16/2001	Manual	\$550.00
dfgsfd	Auto (Personal)	Renewal Image	Personal	\$0.00	08/19/2015	08/16/2000	08/16/2001	Manual	\$450.00
NV_UL_34	Auto (Personal)	New Business	Personal	\$0.00	03/22/2016	03/08/2001	03/08/2002	Manual	\$889.00
G10020323700	Watercraft (small)	Renewal	Personal	\$0.00	10/27/2015	10/12/2005	10/12/2006	Manual	\$900.00

➤ **Edit Columns**
Users have a friendlier column selection editor, which includes an option to re-arrange the columns into a personalized order.

Policy Transaction Grid Column Editor

Visible

- Status
- Insured
- Carrier
- Policy #
- LOB
- Trans Type
- Type
- Net Chg
- Trans Date

Hidden

- Name on Policy
- Motorcycle
- Trailer
- Package
- Dwnld Date
- Agent
- Agency

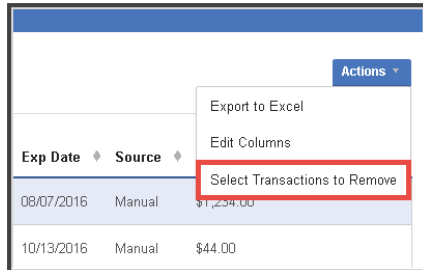
Defaults (Left and Right arrows)

Instructions
 Drag-and-drop to re-arrange the column order
 Drag-and-drop to show or hide columns
 Select item and use directional arrows to show or hide columns

Save

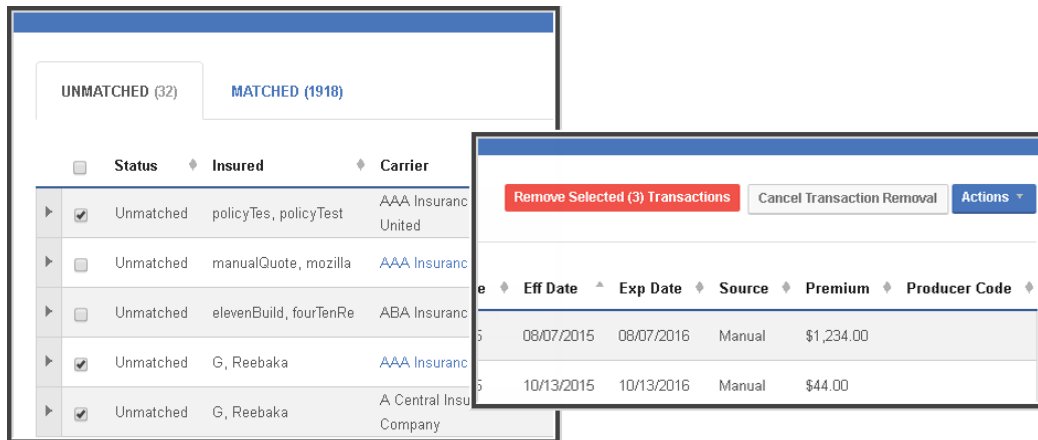
➤ Remove Transaction

Users can now remove selected transactions, one at a time or in bulk.



From the Actions menu, choose “Select Transactions to Remove”.

A column of checkboxes appear at left of the Status column. Check all transactions to delete and click “Remove Selected Transactions.” Or, cancel the Action by clicking “Cancel Transaction Removal”.



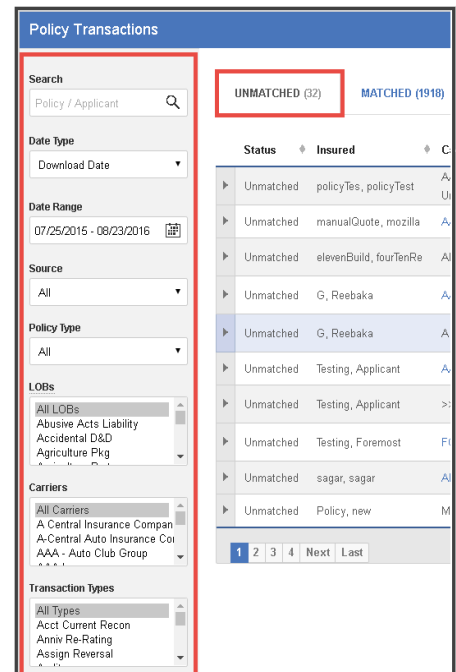
New Filter Panel

Filter options now appear in a panel on the left side of the screen for static viewing. The filters are intuitive; information automatically updates as soon as a new filter is set. The policy and applicant search, date types and ranges are now included in the panel to the left.

Unmatched Transactions Tab

To make managing unmatched transactions easier, we’ve added a tab specifically for transactions that don’t automatically match to a policy or applicant when entering EZLynx.

Expand any record and either match to an existing policy or create a new one! Use the arrow on the left of any transaction record to expand to the potential matches. These are applicants or policies that may match the new transaction, but need your review. This process detects subtle policy number variations that may occur, for example at renewal.



➤ Find Existing Account or Policy

On occasion, possibly for a New Business transaction, the system may not be able to locate an applicant match even though the applicant exists in the system. Use the Search button to find an existing customer or policy.

Find Existing Policies

Find existing account or policy Create new account and policy from transaction

smith Search Advanced Search Options

Expand the results below to match to an existing policy for the same line of business or create a new policy for an existing customer. To create a new customer from the transaction, select the "Create new account" option above the search bar.

BRADLEY J & AMANDA A SMITH Commercial ▲
3693 EURO LN DRAGON TOOTH, WI 59811
Phone: Unknown Email: Unknown
Email:

Policies ^

Create Create a new policy from download

➤ Create New Account & Policy from Transaction

If you have not added the applicant to EZLynx yet, simply select "Create new account and policy from transaction," at the top of the screen. This allows you to quickly add the personal or commercial account and policy to your management system!

Find Existing Policies

Find existing account or policy Create new account and policy from transaction

APPLICANT ASSIGNMENT

Assign To: Jane EZLynx (janeezlynx) ▼

Personal Applicant Commercial Applicant

Primary Insured as identified:

First Name: Reebaka Rating State: WA ▼
Last Name: German Vip: No Yes
[Correct Name](#) Customer Since: 4/13/2016

Account Name:

Address:

NEW QUOTE PROPOSALS FEATURE (BETA)

Interested in BETA testing? [Request access here.](#)

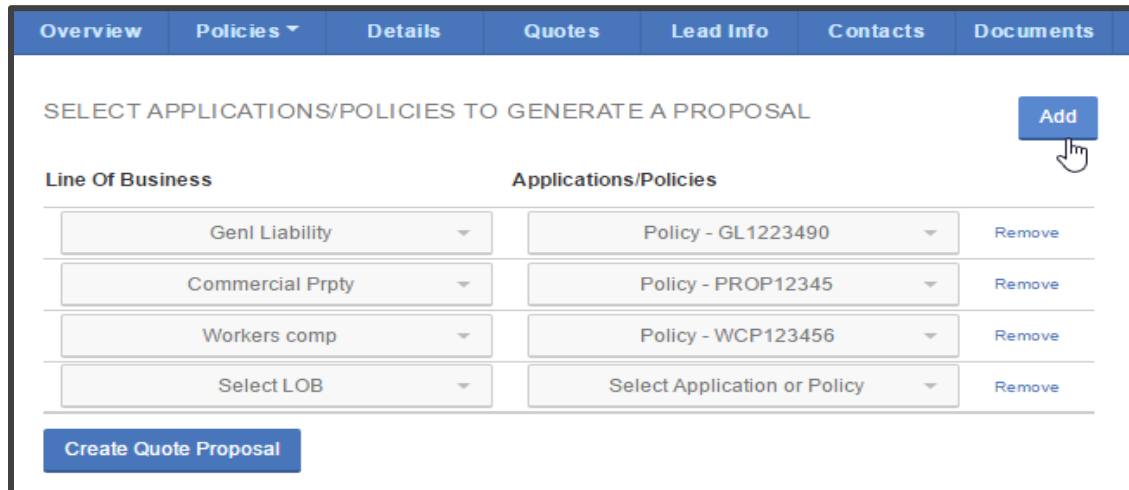
With the newly added Quote Proposals feature, creating a commercial quote proposal is easier than ever. Generate a Proposal from any combination of existing Policies or Applications; currently supported Lines of Business include General Liability, Commercial Property, Workers Compensation, and Commercial Umbrella. Stay tuned for additional features and Lines of Businesses in future releases!

Multiple LOB Proposal

The Proposal feature is accessed from an applicant's Documents tab. Proposals can be created with a single Line of Business or with lines. Choose from existing applications or policies associated with each line of business.

To create a multiple LOB Quote Proposal:

1. From applicant's Documents tab, click Add at top right, and select Quote Proposal.
2. At left, select the multiple LOBs one-by-one.
3. For each LOB, select an application or policy from correlating dropdowns.
4. Click Create Quote Proposal button, and the page with proposal tabs opens.



The screenshot shows the 'Documents' tab in the EZLynx interface. At the top right of the tab is an 'Add' button. Below it is a heading 'SELECT APPLICATIONS/POLICIES TO GENERATE A PROPOSAL'. Underneath is a table with two columns: 'Line Of Business' and 'Applications/Policies'. The table has four rows, each with a dropdown menu for the Line of Business, a dropdown menu for the Application/Policy, and a 'Remove' link. The first row shows 'Genl Liability' and 'Policy - GL1223490'. The second row shows 'Commercial Prpty' and 'Policy - PROP12345'. The third row shows 'Workers comp' and 'Policy - WCP123456'. The fourth row shows 'Select LOB' and 'Select Application or Policy'. At the bottom left of the table area is a 'Create Quote Proposal' button.

Line Of Business	Applications/Policies	
Genl Liability	Policy - GL1223490	Remove
Commercial Prpty	Policy - PROP12345	Remove
Workers comp	Policy - WCP123456	Remove
Select LOB	Select Application or Policy	Remove

➤ Proposal Tabs

Now advance through the proposal tabs; cover page, tab for each LOB, and Premium Summary & Legal. The Cover Page tab prefills with customer and agency information. Also, for a super streamlined process, each LOB tab's fields prefill from the policy or application.

- Save proposal as an editable Microsoft Word or non-editable PDF file.
- Although prefilled from application or policy, proposal is still editable; however, edits do not change the application or policy.



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September 1, 2016 Release

- Proposal is saved to the Documents tab

(see screenshots on next page)

Warning: Any change made to this Proposal will not be saved in the Application or Policy. You must "Edit" and then "Save" your desired changes in the Application / Policy before creating the ACORD Application.

Customer

Customer Name:

Agency Name:

Document Info

Document Name:

Document Type:

Application Information

Carrier Name:

Remarks:

Location(s)

LOCATION 1

Building 1	Building #	Address 1	Address 2	City	State	Zip Code	County
<input type="button" value="Remove"/>	<input type="text" value="1"/>	<input type="text" value="322 Main Street - Building A"/>	<input type="text"/>	<input type="text" value="Sanger"/>	<input type="text" value="TX"/>	<input type="text" value="76266"/>	<input type="text" value="Denton"/>

Building 1 Coverages	Coverage #	Subject of Insurance	Amount	Co-insurance	Cause of Loss	Valuation	Deductible	Deductible Type	Forms Conditions
<input type="button" value="Remove"/>	<input type="text" value="1"/>	<input type="text" value="Building"/>	<input type="text" value="\$600,000"/>	<input type="text" value="80%"/>	<input type="text" value="Special with Theft"/>	<input type="text" value="RC"/>	<input type="text" value="2"/>	<input type="text" value="%"/>	<input type="text" value="4% wind / hail deductible applies"/>
<input type="button" value="Remove"/>	<input type="text" value="2"/>	<input type="text" value="Business Personal Property"/>	<input type="text" value="\$150,000"/>	<input type="text" value="80%"/>	<input type="text" value="Special Excl Theft"/>	<input type="text" value="RC"/>	<input type="text" value="1000"/>	<input type="text" value="\$"/>	<input type="text" value="Theft is included"/>

Building 2	Building #	Address 1	Address 2	City	State	Zip Code	County
<input type="button" value="Remove"/>	<input type="text" value="2"/>	<input type="text" value="322 Main Street - Building B"/>	<input type="text" value="Warehouse / Storage Building"/>	<input type="text" value="Sanger"/>	<input type="text" value="TX"/>	<input type="text" value="76266"/>	<input type="text" value="Denton"/>

Building 2 Coverages	Coverage #	Subject of Insurance	Amount	Co-insurance	Cause of Loss	Valuation	Deductible	Deductible Type	Forms Conditions
<input type="button" value="Remove"/>	<input type="text" value="1"/>	<input type="text" value="Business Personal Property"/>	<input type="text" value="\$200,000"/>	<input type="text" value="80%"/>	<input type="text" value="Special with Theft"/>	<input type="text" value="RC"/>	<input type="text" value="2"/>	<input type="text" value="%"/>	<input type="text" value="4% wind / hail deductible applies"/>
<input type="button" value="Remove"/>	<input type="text" value="2"/>	<input type="text" value="Business Personal Property"/>	<input type="text" value="\$100,000"/>	<input type="text" value="80%"/>	<input type="text" value="Special with Theft"/>	<input type="text" value="RC"/>	<input type="text" value="1000"/>	<input type="text" value="\$"/>	<input type="text" value="theft is included"/>

Coming Soon

- Ability to perform final accuracy review of Word Proposals before printing or emailing.
- PDF proposals will be saved without the ability to make changes.
- Ability to open both Word and PDF Proposals in the EZLynx Editor to make edits.

ESIGNATURE PAY-PER-USER OPTION

We're introducing a new payment structure so an agency can pay-per-user or pay-per-use (envelope). The newly added pay-per-user option charges a flat monthly fee for sending unlimited envelopes.

Contact your EZLynx sales rep to switch to the per user option, then manage users from within EZLynx.

1. Hover over the Settings icon, and select Product Settings.
2. At the Product: eSignature page, search users by name or username, then click Add.
3. A newly added user must logout of EZLynx and back in for the change to take effect.
 - If removed, a user can no longer send an envelope.

Product: eSignature

Users to add [Add Users](#)

Manage Users (3)

First Name	Last Name	User Name	
Commercial	Downloadfour	commercialAGAD	X Remove
Commercial	Download	CommercialDownload	X Remove
Commercial	Download Two	CommercialDownload2	X Remove

- Settings
- Carrier Logins
- Carrier Defaults
- Quote Templates
- EZLynx Preferences
- My Contact Info
- Change Password
- Email Signature
- Email Suppression List
- Campaign Settings
- Manage Lead Sources
- Manage Carriers
- Manage Lines of Business
- Manage Service Team
- Email Subscription Management
- Agency Admin
- Product Settings**

Questions? Contact support@ezlynx.com