What’s New in EZLynx 4.16.08

September 1, 2016 Release

CONTENTS

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

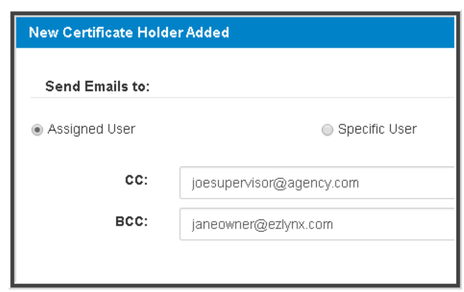
For agencies that spend a lot of time creating certificates, this is a great new enhancement that allows agency customers to generate their own certificates from their Client Center account.

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**.

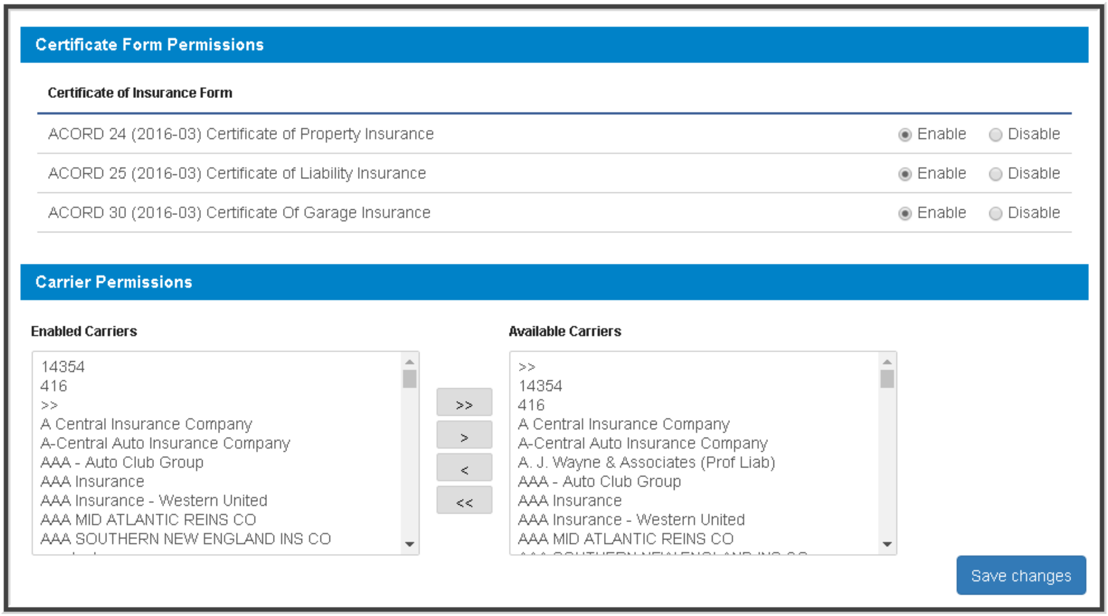


Enable Certificate Types & Carriers (Self Admin)

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.

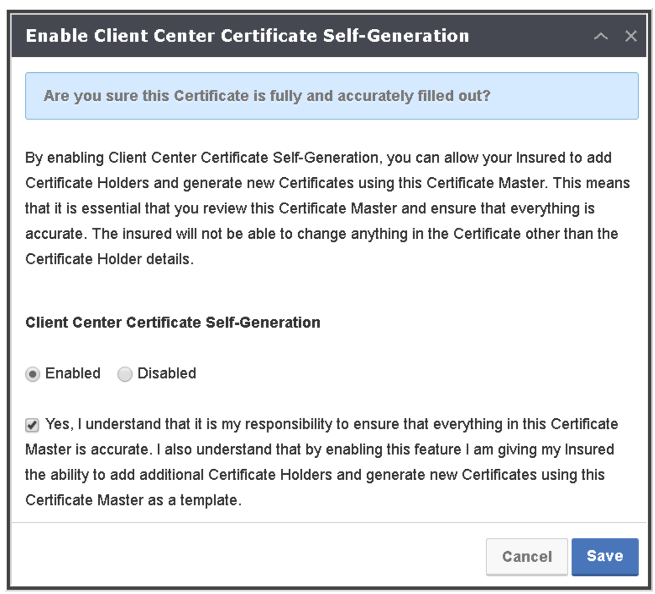
1. Hover over the **Settings** icon, select **Client Center**.
2. Click **Certificates** tab.
3. At **Certificate Form Permissions**, go to right to **Enable** or **Disable**.
4. At **Carrier Permissions**, use arrow buttons to move **Available Carriers** to **Enabled Carriers**.
5. Click **Save Changes**.

(see screenshot on next page)



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.

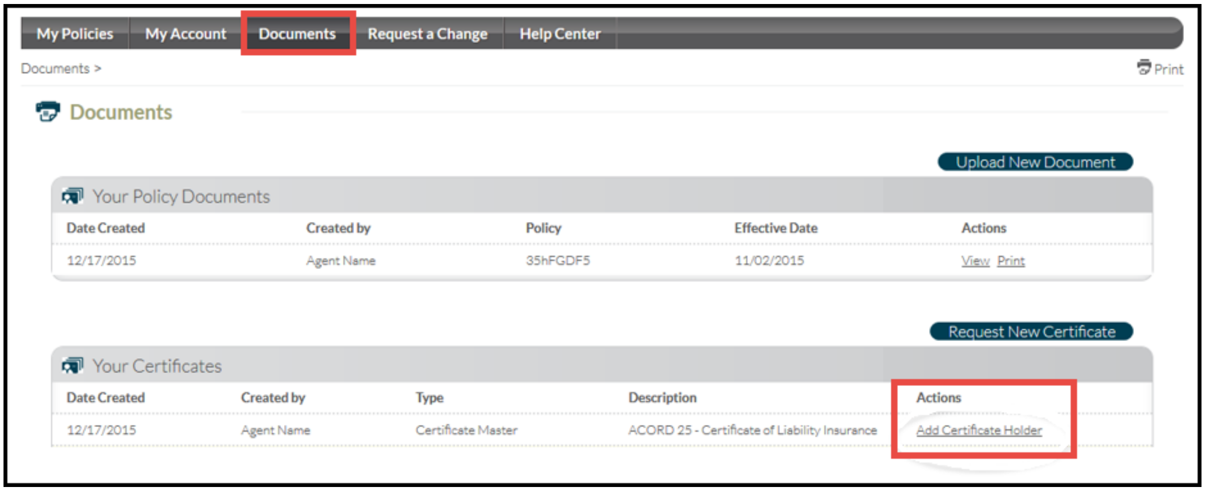


To enable a Certificate Master:

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.

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!

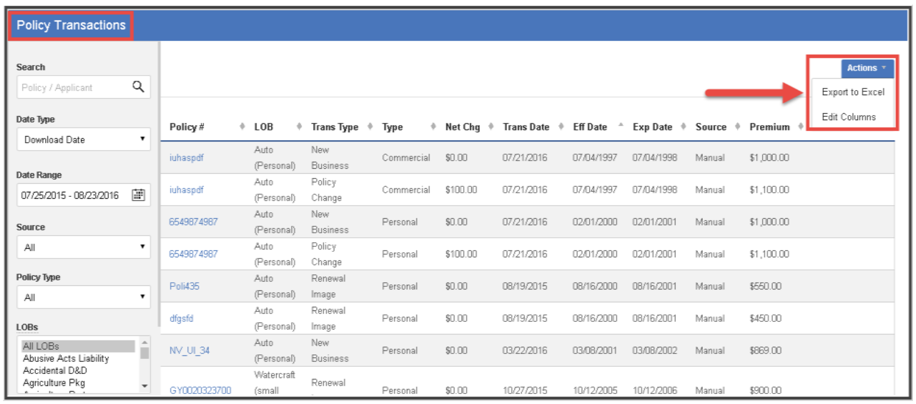
Highlights

- [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

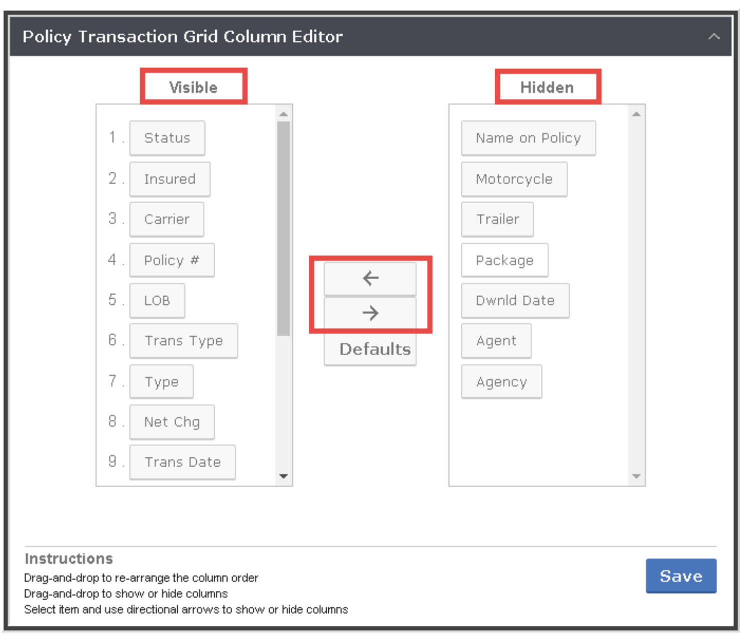
Perform 3 tasks with the new actions button:

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

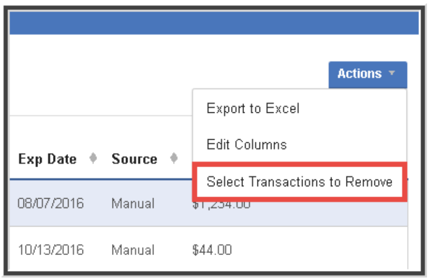


➢ **Export to Excel**
By selecting Export to Excel, users can download their policy transactions list to Excel for better sorting.

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

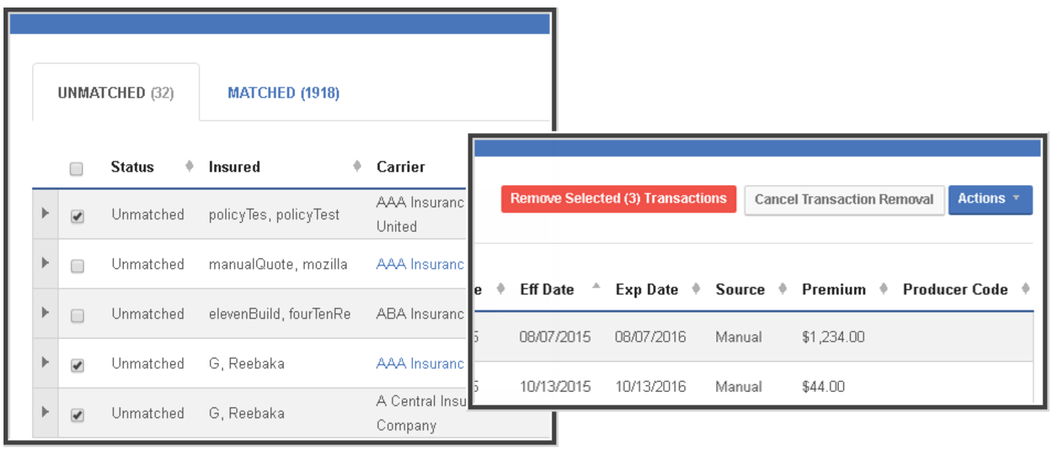


- **Remove Transaction**
  Users can now remove selected transactions, one at a time or in bulk.



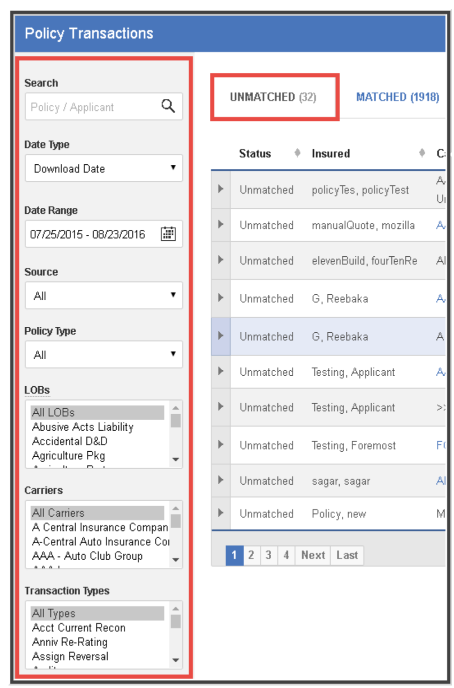
From the Actions menu, choose "Select Transactions to Remove".

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.

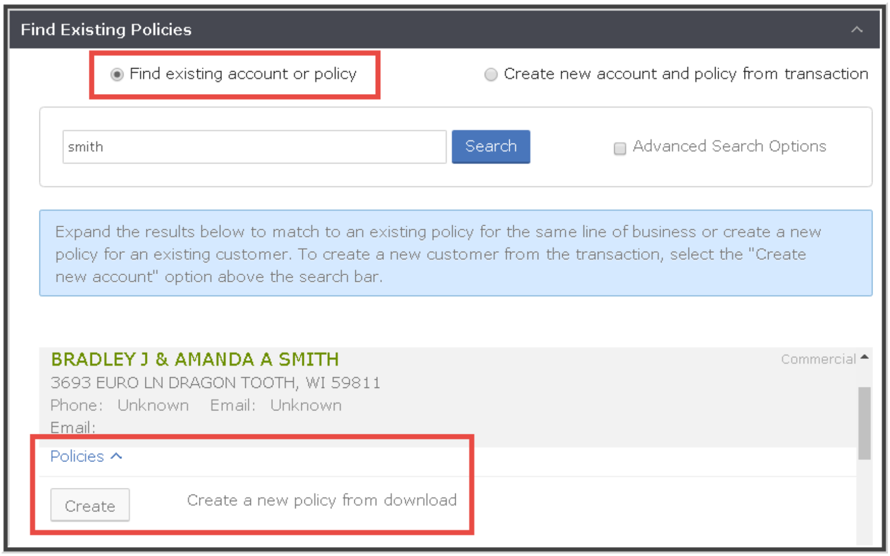


Unmatched Transactions Tab

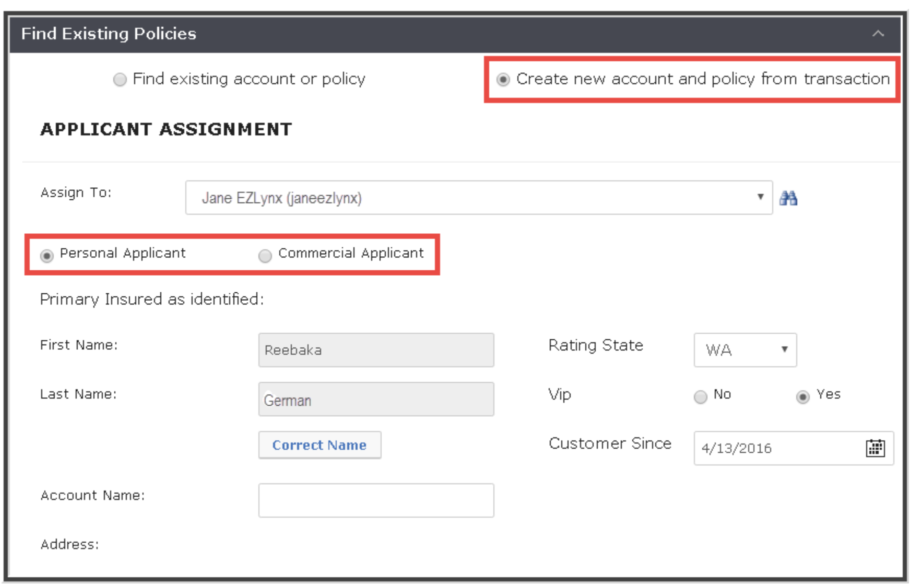
To make managing unmatched transactions easier, we've added a tab specifically for transactions that don't automatically match to a policy or applicant when entering EZLynx.

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.



- **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!



NEW QUOTE PROPOSALS FEATURE (BETA)

Interested in BETA testing? Request access here.

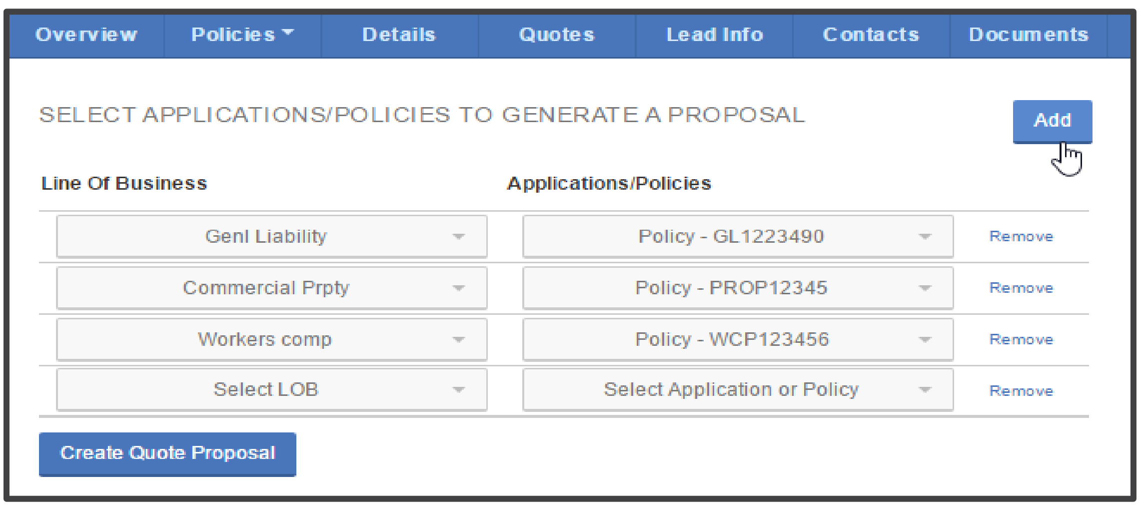
With the newly added Quote Proposals feature, creating a commercial quote proposal is easier than ever. Generate a Proposal from any combination of existing Policies or Applications; currently supported Lines of Business include General Liability, Commercial Property, Workers Compensation, and Commercial 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.



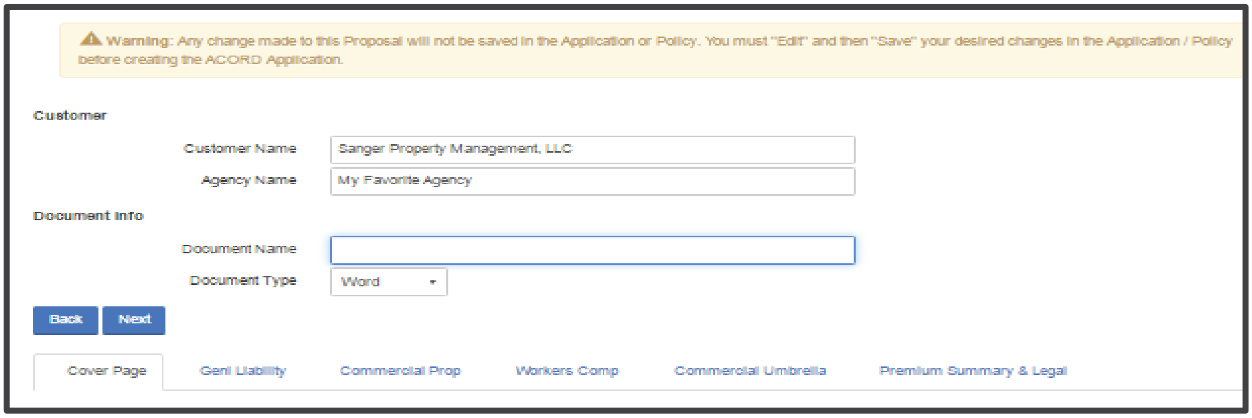
- **Proposal Tabs**

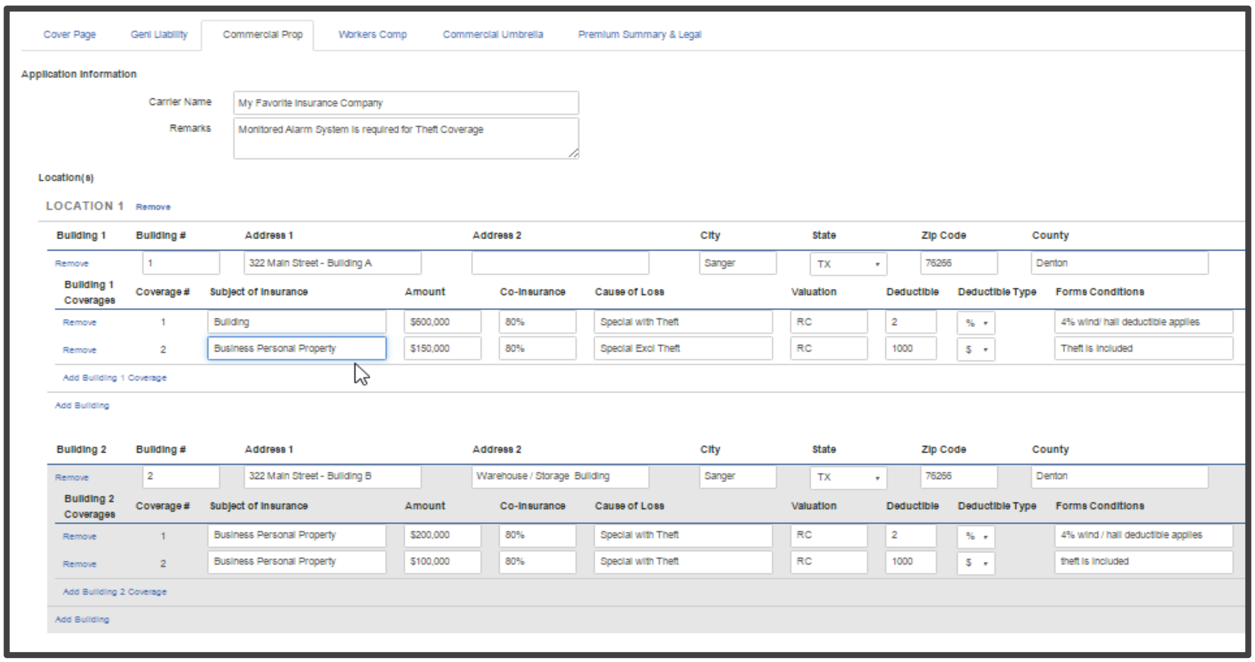
  Now advance through the proposal tabs; cover page, tab for each LOB, and Premium Summary & Legal. The Cover Page tab prefills with customer and agency information. Also, for a super streamlined process, each LOB tab’s fields prefill from the policy or application.

  - 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.

- Proposal is saved to the Documents tab

(see screenshots on next page)





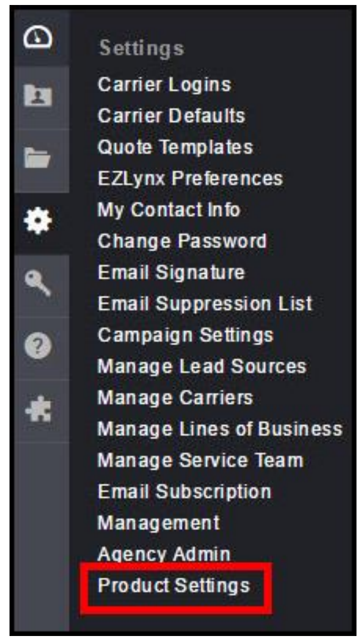
Coming Soon

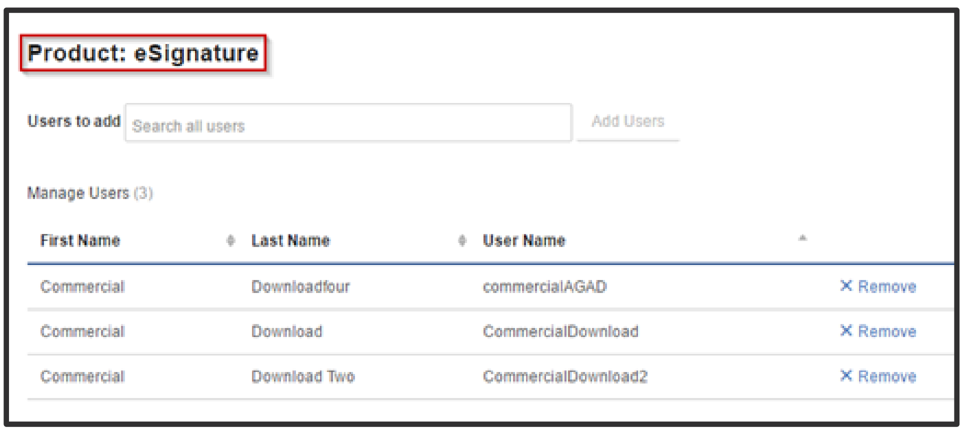
- Ability to perform final accuracy review of Word Proposals before printing or emailing.
- PDF proposals will be saved without the ability to make changes.
- Ability to open both Word and PDF Proposals in the EZLynx Editor to make edits.

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.





Questions? Contact support@ezlynx.com