



During the first week in July, we're rolling out EZLynx 4.16.06 which includes an enhanced Reports UI with turbo charged features. Also, there is a BETA roll out of several Commercial Management System features: Commercial Package Policy support, Commercial Applications and Proposals.

## Highlights

### Reports 2.0

- Simpler navigation & more sophisticated filters
- Ability to customize any Detail or Master report; save for future use
- Activity Summary Report
- Quotes Summary Report

### BETA Release

- Commercial Package Policy Support (Manual entry only)
- Commercial Applications
- Commercial Proposals

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Interested in BETA testing? Contact [support@ezlynx.com](mailto:support@ezlynx.com)

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## Reports 2.0

EZLynx Reports 2.0 have a new user interface and extensive filtering capabilities.

The report types:

**Detail Reports** - a preset table of data that can be modified using various report criteria filters.

**Summary Reports** - key information at a glance, and tools for getting the most from their data.

**Master Reports** - include more tools for creating custom reports; detailed filters, aggregates, grouping, sorting, paging, and chart creation.

**Legacy Reports:** the classic reports we've always offered; to be updated to the new UI soon.

Inspired to learn more? View the reports guides here.

- [Detail Reports Guide](#)
- [Summary Reports Guide](#)
- [Master Reports Guide](#)

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Want to see the new reports in action? [Register for a free webinar here](#)

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# What's New in EZLynx 4.16.06

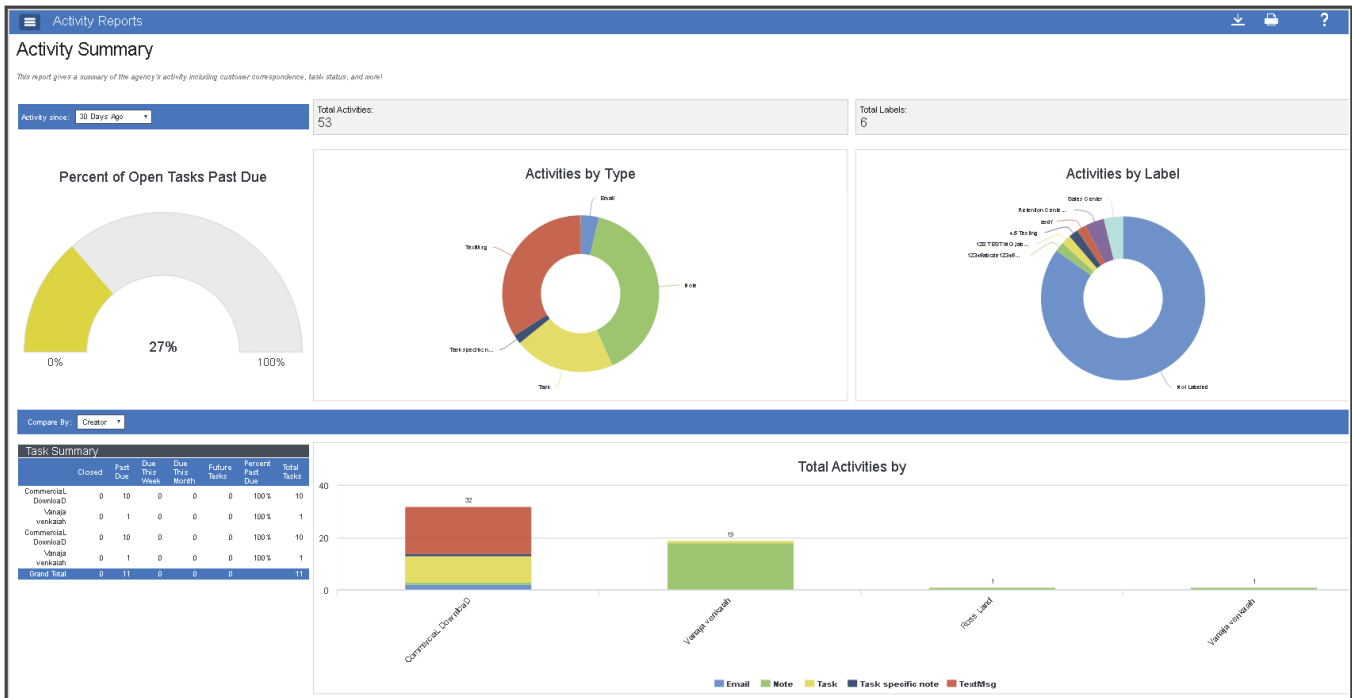
July 2016 Release

Customized Detail and Master Reports can be saved for future use. When saved reports including sliding date range filters, the report data will likely change each time the report is run.

## Saved Reports

Activity Reports	>
Applicant Reports	>
Book Of Business Reports	>
Commission Reports	>
Policy Management Reports	>
Quote Reports	>

## Activity Summary Report



## Quote Summary Report

### Quote Summary

View this report for summary information on quotes by Agent, Carrier, Line of Business, etc.

Quoted since:  Compare by:

*Customers will be counted more than once if they are assigned to multiple Lines of Business.*

#### Quote Summary

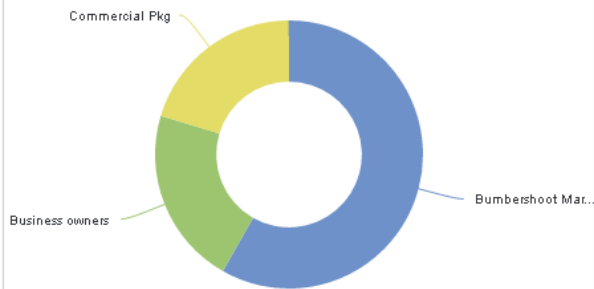
Line of Business	Number of Customers	Total Submissions	Total Success	Total Failure	Total Aborted	Total Manual	Average Premium
Auto (Personal)	16	16	0	16	0	0	
Bumbershoot Marine Liability	1	0	0	0	0	1	\$12,345.00
Business owners	1	0	0	0	0	1	\$4,545.00
Commercial Pkg	4	0	0	0	0	4	\$4,311.25
<b>Grand Total</b>	<b>22</b>	<b>16</b>	<b>0</b>	<b>16</b>	<b>0</b>	<b>6</b>	<b>5.3k</b>

Average Premium:  
**\$1,551.59**

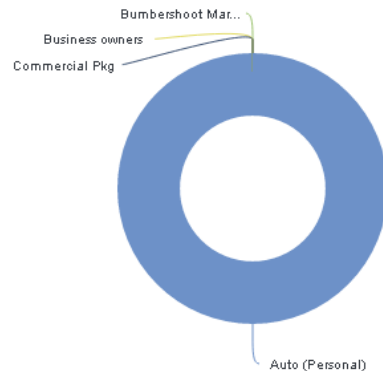
Total Customers:  
**22**

Total Submissions:  
**16**

Average Premium by Line of Business



Quote Submissions by Line of Business





## Commercial Package Policy Support (BETA Release)

Manual entry only

Maintain more accurate policy information and improve reporting capabilities by truly grouping lines of business within a one single package policy.

Let's take a look at the details

When adding a manual personal or commercial package policy in EZLynx, the user can now add the individual policies included in the package.

After selecting either personal or commercial package as the main Line of Business, add any number of individual LOBs and their premiums as you'd like.

The Add & Edit Policy feature prompts the user through a series of tabs for adding detailed policy information; to reduce data entry keying, some tabs gather information that can be shared across multiple policies.

**Add New Policy**

**POLICY INFO**

Line of Business \* **Commercial Pkg**

Included Lines **---Select---**

Transaction Type \* **---Select---**

Please enter policy # e carrier's site. A duplica incorrectly.

Policy # \*

Effective Date \*

Expiration Date \*

- Auto (Commercial)
- Boiler and Mach
- Commercial Prpty
- Crime
- Cyber Liability
- Directors and Officers
- Empl Practices Liab
- Errors and Omissions
- Genl Liability
- Inland marine (comm)
- Umbrella - Comm

**Add New Policy**

**POLICY INFO**

Line of Business \* **Commercial Pkg**

Included Lines **Auto (Commercial)**

Included Lines **Genl Liability**

Included Lines **Inland marine (comm)**

[Add Line of Business](#)

Transaction Type \* **New Business**

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 # \*

**PREMIUM & ADDITIONAL CHARGES**

Written Premium \* **1139.00**

Full-Term Premium \* **\$1,139.00**

Annual Premium \*

Estimated Fees

Estimated Taxes

Total Commission %

**SERVICE TEAM**

**Add** **No rule matches**  Override Rule

Description

**Cancel** **Add Policy** **Add & Edit Policy**



Tabs to collect information shared between all policies in the package; for less data entry.

Policy Number: AB-99999 - Active  
 Line of Business: Commercial Pkg | Term: 6/23/2016 - 6/23/2017 | Carrier: Safeco Insurance | Full Term Premium: \$340.00 | Source: Manual

Save & Close Cancel < Previous Next >

Insured Information Auto (Commercial) Genl Liability Umbrella - Comm Underwriting Additional Interest

**BUSINESS INFORMATION**

Nature of Business: <Select One> % of Installation, Service, or Repair work:

Date Business Started: mm/dd/yyyy % of Off Premises Installation, Service, or Repair Work:

Description of Primary Operations Description of Operations of Other Named Insureds

## Commercial Applications (BETA Release)

The ability to add commercial applications in EZLynx is a huge, time-saving tool for agencies that write commercial business. Complete the application once in EZLynx, then easily create necessary ACORD form for submission to multiple carriers.

Take an application and quickly transform it into a policy or take a policy and create an application from the data.

Starline Limos Overview Policies Details Quotes Lead Info Contacts Documents Requests Activity Invoices Invoices

APPLICATION(S) Add Commercial Application

LOB	Last Modified	Description	Actions	Forms
Business owners	6/20/2016	Add any description here	Actions	View
Umbrella - Comm	6/20/2016	Add any description here	Actions	View

POLICIES Show Inactive and Unknown Add Policy Edit Columns

Status	Carrier	Premium	Policy #	Producer Code	LOB	Effective	Expiration	Actions	Forms	Details
Active	A Central Insurance Company	\$6,000.00	Polycnumber	--	Genl Liability	6/20/2016	6/20/2017	Actions	Forms	Details

## Commercial Proposals (BETA Release)

From a Commercial applicant's Documents tab, click the Add button and select Quote Proposal. Ability to select one manual policy from each LOB, then click Add Quote Proposal. The feature will be expanded to include downloaded policies in the near future.

Supported LOBs:

- Commercial Auto
- General Liability
- Commercial Property
- ...more coming soon

Created By	Date Created	Date Modified	Share
Commercial	6/21/2016	6/21/2016	<input type="checkbox"/>
Download			<input type="checkbox"/>

**Auto (Commercial)**

Source	Description	Expiration/Last Modified	Status
<input type="radio"/> Policy # Auto-123		6/14/2017	Active
<input checked="" type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive
<input type="radio"/> Policy # 12345		3/1/2016	Inactive
<input type="radio"/> Policy # nwl-123		6/9/2016	Inactive

**Genl Liability**

Source	Description	Expiration/Last Modified	Status
<input type="radio"/> Policy # Gen-123		5/10/2017	Active
<input checked="" type="radio"/> Policy # 1243		6/7/2017	Active
<input type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive

**Commercial Prpty**

Source	Description	Expiration/Last Modified	Status
<input checked="" type="radio"/> Policy # Comm-123		5/9/2017	Active
<input type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive

[Create Quote Proposal](#)