

Today, May 6th, we introduce EZLynx 4.16.04 which includes several exciting enhancements for Certificates, Agency Form Templates, Email Campaigns, MAP Underwriting Requests, and MORE!

# **Highlights**

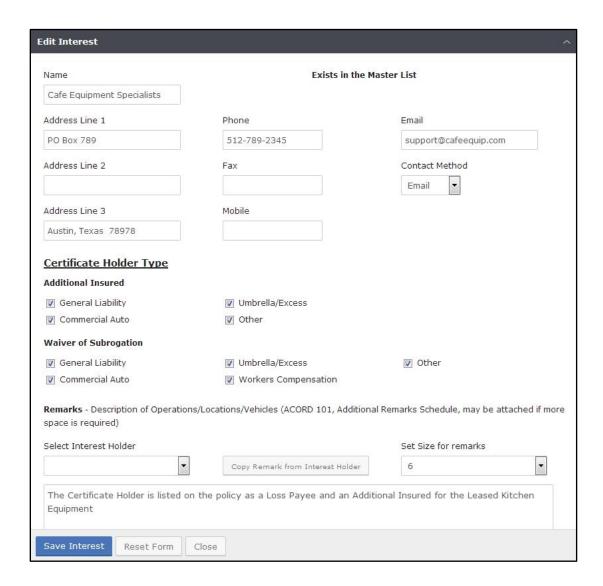
- Certificate Holder redesign
- Agency Form Templates
  - Support for Word docs using merge fields
  - New mapping workflow to map merge fields to EZLynx fields
  - Added over 80 NEW fields available to merge
- Automatic matching for imported commission statements
- MAP Shared credentials enhancements
- MAP Underwriting Requests (formerly called Messaging)
- Advanced email signature configuration for Email Campaigns

## Certificates

The Certificate Master workflow is even more efficient now by automatically pre-filling any interest holder information associated with selected policies. The interest holders screen has also been redesigned to include additional holder information applicable to the specific certificate.

Let's take a closer look at an example below...

- This example is for the ACORD 25 Certificate of Liability Insurance
- The Certificate Holder Type now allows you to specify the Additional Insured and Waiver of Subrogation by line of business per holder



# **Agency Forms**

#### Access the Agency Form Templates Guide

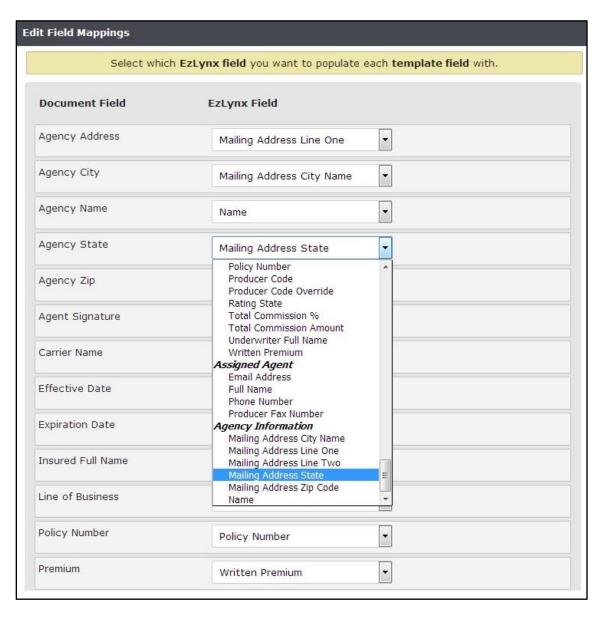
We've simplified our Agency Form Templates by adding a new mapping workflow, support for Word Docs, and over 80 NEW fields available to merge. These merge fields allow you to quickly prefill information into your agency forms regarding customer, policy, and/or agency details.

#### Managing Agency Forms

- You can manage your Agency Forms by going to Settings > "Manage Form Templates"
  - o Note: Existing forms now have the ability to edit the field mappings directly in EZLynx
- Adding a new form is as simple as selecting Add Form Template, and uploading either a PDF or docx file



 Selecting Save takes you to the Edit Field Mappings screen for you to select which EZLynx field matches your template field



#### MAP (MGA) Underwriting Requests (formerly Messaging) - Updated UI and Enhancements

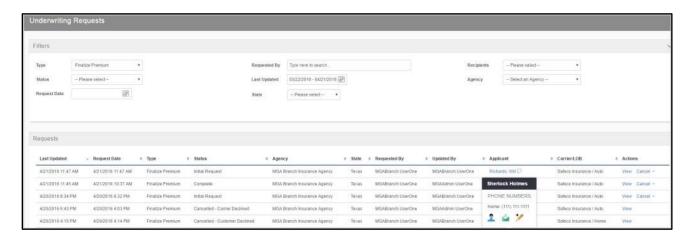
EZLynx Messaging has undergone several enhancements and is now called EZLynx Underwriting Requests. This enhanced feature with its new user friendly and efficient design allows for Requests to be filtered by new time frames of 30 Days, 7 Days or Today.

### Watch the MAP Underwriting Request (formerly Messaging) webinar

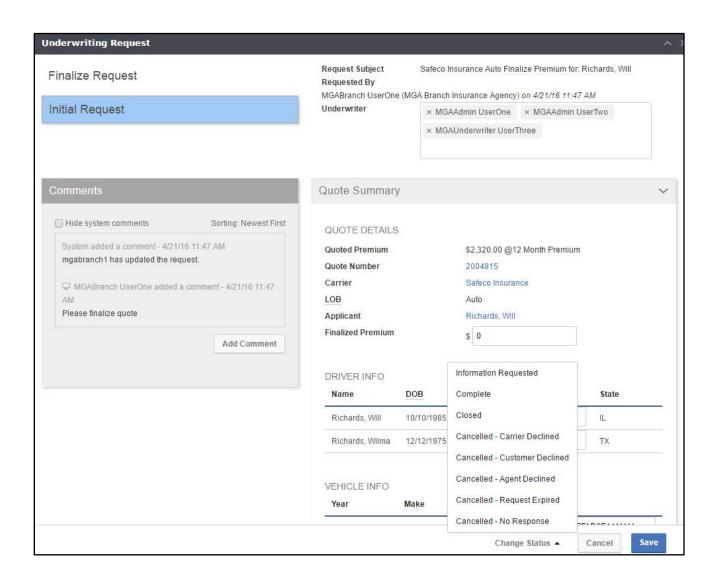
In addition, underwriting request list has been redesigned to enhance the capability to sort through many different filter. The search for a specific agency or agent's request has been made more user friendly.



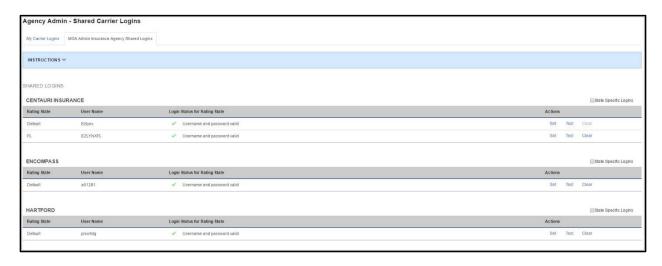
NEW Able to see the applicant EZContact box.

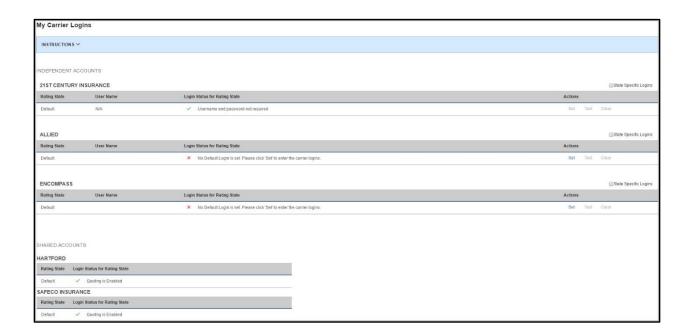


When viewing the premium request in the new layout, you can change the request status, alter the premium, view past messages and remove underwriters. Also, you can add multiple attachments that automatically save to the applicant's Documents tab.



The enhancements continue with a new Carrier Logins page. An Admin can hover over the Settings tab, and select Carrier Logins to manage the shared carrier logins instead of from the Admin icon and Profiles tab. To set state specific logins, it is now required to set a default login before setting the specific state logins.





# EZLynx Management System - Commissions

- Updated auto-mapping of fields for imported commission statements
- New transactions now available on commission statements, including Database Sync