

Welcome to Drill Through Reporting


Drill Through Reporting offers tools that allow you to click on a various sections of a summary report chart or table to drill through and view the details that make up that visualization.

Report Basics

ACCESS REPORTS

A user must have the appropriate permission to access reports. Need report access? Contact support@ezlynx.com.


To access reports:

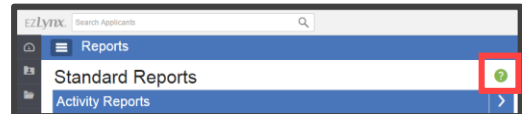
- Click the reports icon; located on the left side of all EZLynx pages 
 - Each report category can be expanded and collapsed by clicking the report category or the arrow on the right

LOCATE A REPORT

To help users locate and understand individual reports, there is a guide to assist with each report.

To view a report's guide:

- Click the *blue?* icon at the top right corner of any report 
- Or, click the *green?* icon at the right of the Standard Reports list

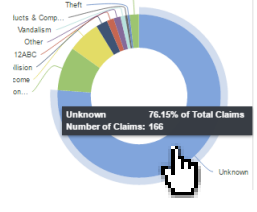
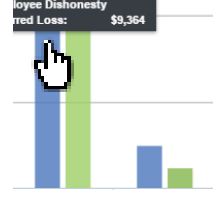
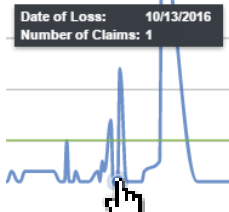
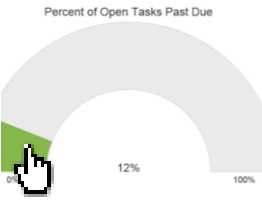


Drill Through Features

DRILL THROUGH CHARTS

To access the drill through details for Summary Report Charts:

- Click on the name of the report that you would like to view (ie : "**Claims Summary**"); any report with "Summary" in the title has drill through capabilities.
- Ensure that any report filters etc. are set up the way that you would like. For help setting up the report, click the "?" icon in the upper right hand corner to view help documentation for that report.
- To view additional information in regards to any chart; simply click on the part of the chart that you are interested in and additional details will display in a pop-up (see page 5 for details).

Pie Chart	Bar Chart	Line Chart	Others
			
Click on the Pie Chart Slice , to see additional details.	Click on the Bar Chart Solid Bar to see additional details.	Click on the Line Chart Solid Dot on the line, to see additional details.	All other chart types will function in the same way; simply click on the chart to see additional details.

DRILL THROUGH TABLES

To access the drill through details for Summary Report Tables:

- Click on the name of the report that you would like to view (ie. : "**Applicant Summary**"); any report with "Summary" in the title has drill through capabilities.
- Ensure that any report filters etc. are set up the way that you would like. For help setting up the report, click the "?" icon in the upper right hand corner to view help documentation for that report.
- Click on any text inside the table to view the drill through details on information aggregated for that cell. (For more information on the drill through pop-up, see page 5.)

Applicant Locations			
Location	Number of Active Customers	Number of Active Policies	Annualized Premium
AK	7	92	\$1,801,409.46
AL	10	23	\$873,794.10
AR	6	11	\$18,119.62
AZ	13	28	\$116,397.14




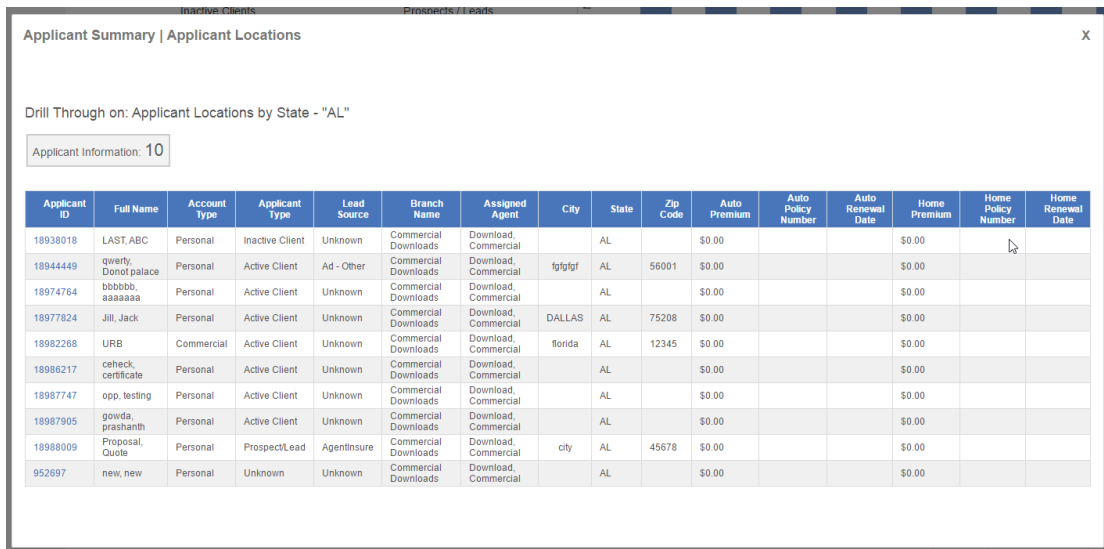
Drill Through Reporting Guide

DRILL THROUGH POP-UP

The “Drill Through” pop up window includes the following features:

- **Drill Through Header** – Shows the original Summary Report and Chart name.
- **Drill Through Sub-Header** – Provides the the Chart name and Drill Through selection.
- **Columns Sorting** – All columns have the ability to sort; similar to all other reports. Simply click the header to sort one direction and click again to sort in the other direction.

EZTIP: Click the  in the top right corner to close the pop-up and return to the Summary Report.



Applicant Summary | Applicant Locations

Drill Through on: Applicant Locations by State - "AL"

Applicant Information: 10

Applicant ID	Full Name	Account Type	Applicant Type	Lead Source	Branch Name	Assigned Agent	City	State	Zip Code	Auto Premium	Auto Policy Number	Auto Renewal Date	Home Premium	Home Policy Number	Home Renewal Date
18938018	LAST,ABC	Personal	Inactive Client	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		
18944449	qwerly, Dotot palace	Personal	Active Client	Ad - Other	Commercial Downloads	Download, Commercial	fgtjfgt	AL	56001	\$0.00			\$0.00		
18974764	bbbbbb, aaaaaa	Personal	Active Client	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		
18977824	Jill, Jack	Personal	Active Client	Unknown	Commercial Downloads	Download, Commercial	DALLAS	AL	75208	\$0.00			\$0.00		
18982268	URB	Commercial	Active Client	Unknown	Commercial Downloads	Download, Commercial	florida	AL	12345	\$0.00			\$0.00		
18986217	ceheck, certificate	Personal	Active Client	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		
18987747	opp, testing	Personal	Active Client	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		
18987905	gowda, prashanth	Personal	Active Client	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		
18988009	Proposal, Quote	Personal	ProspectLead	Agentinsure	Commercial Downloads	Download, Commercial	city	AL	45678	\$0.00			\$0.00		
952697	new, new	Personal	Unknown	Unknown	Commercial Downloads	Download, Commercial		AL		\$0.00			\$0.00		

Questions? Contact support@ezlynx.com.