

Agency Admin is a Rating Engine feature used to manage users, carriers, rating states and invoices - 24/7/365.

[Watch the Agency Admin 101 video 5 min.](#)

Who can use Agency Admin?

Any user at a Main office can be setup with Agency Admin.

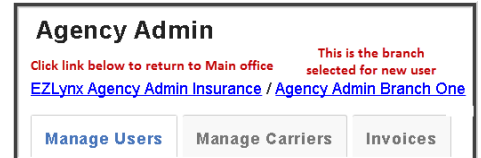
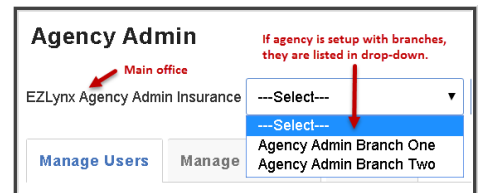
- Requires admin approval.
- Not available to agencies contracted with an MGA/brokerage.

Access Agency Admin & Office

- Hover over the **Settings** icon, and select **Agency Admin**.
 - If you don't have this option, contact support@ezlynx.com.

Add a New User

1. Click the **Manage Users** tab.
2. **Select user's office** (upper left).
 - Leave as Main office, or select a branch.
3. Click **Add User** at right, and **enter the user's information**.
 - **Username** - any format, but at least 6 characters.
4. **Select user's access level** – check boxes for appropriate groups.
 - The access groups give the user the ability to accomplish various tasks while working in EZLynx. See group descriptions to assist with this task.
 - Every user must be added to a **Basic (Default) User** group.
 - **To give a user access to EZLynx Management System, you MUST contact EZLynx.**
5. Click **Save**.
6. Go to **Actions** at right and click **Welcome Email** to send the username and a link to create a password (expires after 15 minutes).



Add User

First Name:

Last Name:

Username:

Email:

Status:

Phone:

Select the access level for this user.

Group Name	<input type="checkbox"/> Select All	Description
Accounting	<input type="checkbox"/>	• This access level allows a user to access policy manager
Basic User	<input checked="" type="checkbox"/>	• All users must have this access level to perform the basic • This is assigned to users who need to have access to the
EZLogin	<input checked="" type="checkbox"/>	• All users should be given this access level. It provides use carrier site, automatically logs in and lands on the quote. 1
Peer	<input checked="" type="checkbox"/>	• This access level allows a user to access to all applicants • This access level should only be given to a user in a Main
Reports	<input type="checkbox"/>	• This role allows users to export, email, or schedule report
Agency Admin	<input type="checkbox"/>	• This access level allows a user to view and/or pay the thre • This access level allows a user to perform Self Admin fun

Can't add a user? If your agency has reached max users, either disable a user who no longer needs access to the system or contact billing@ezlynx.com to add more user openings to your account.

Manage an Existing User

1. Click the **Manage Users** tab.
2. **Select user's office** (upper left).
 - Leave as Main office, or select a branch.
3. Check **Include Disabled Users** box (optional).
4. Go to a user's **Actions** link on right and select one:
 - **Disable** - a user who no longer needs EZLynx access; allows adding a new user at no extra cost.
 - **Edit** - to update name, email address, phone # or access level.
 - **Reset Password** - to send user a reset password email.
 - **Enable** - to re-enable a disabled user.




Manage Users : Users List (5)					<input checked="" type="checkbox"/> Include Disabled Users	Add User
First Name	Last Name	Email	User Name	Enabled	Actions	
Joe	User	joe@ezlynxselfadmin.com	JoeUser	✓	Actions ▾	
Jim	Goner	jim@ezlynxselfadmin.com	JimGoner	✓	Actions ▾	
Jill	Assistant	jill@ezlynxselfadmin.com	JillAssistant	✓	Actions ▾	
Jeff	Left	jeff@ezlynxselfadmin.com	JeffLeft	✗	Actions ▾	

Add or Remove a Carrier

1. Click the **Manage Carriers** tab.
2. Click the **Change Auto (or Home) Carriers** button at right.
3. Check or uncheck the carrier's rating states.
 - This page lists all of the carriers that EZLynx offers for your rating states (per LOB).
4. Click **Save**.
5. If adding a new carrier, remind users to set Carrier Logins and Carrier Defaults in EZLynx before rating.

Pay or Download Invoices

1. Click the **Invoices** tab.
2. At an invoice, go to **Actions** to pay an invoice, or click the PDF icon to save it to your computer.

Number	Date	Amount	Status	Balance	Actions
 D0261720	7/27/2016	2400.00		2400.00	Pay Now
 D0222394	8/26/2015	2607.12	Paid	0.00	
 183808	8/1/2014	2607.00	Paid	0.00	

EZTip: Click the **History** button at the top of page to view date-stamped activities; by user.

Questions? Contact support@ezlynx.com.