

With EZLynx Postal Mail, select any ACORD form(s) or other PDFs from your applicant’s Documents tab in EZLynx and have those documents printed and mailed to the applicant with a few simple clicks. This is a pay-as-you go feature, so fees only apply when a mailing is scheduled. Fees are determined by the mailing’s number of pages, printing options, and postage type.

While this first version of Postal Mail only sends single mailings to individual applicants, we are exploring opportunities for bulk mailings and other mailing types like folded cards, post cards, and more.

Benefits

- Focus on customer relationships – don’t waste time stuffing envelopes.
- Save money and be a paperless office – no more printers, paper, envelopes, and stamps.
- Save a trip to the post office for those certified letters!
- Better record keeping for Errors & Omission purposes – all mailings are logged and saved forever.

AGENCY SETUP TASKS (Admins only)

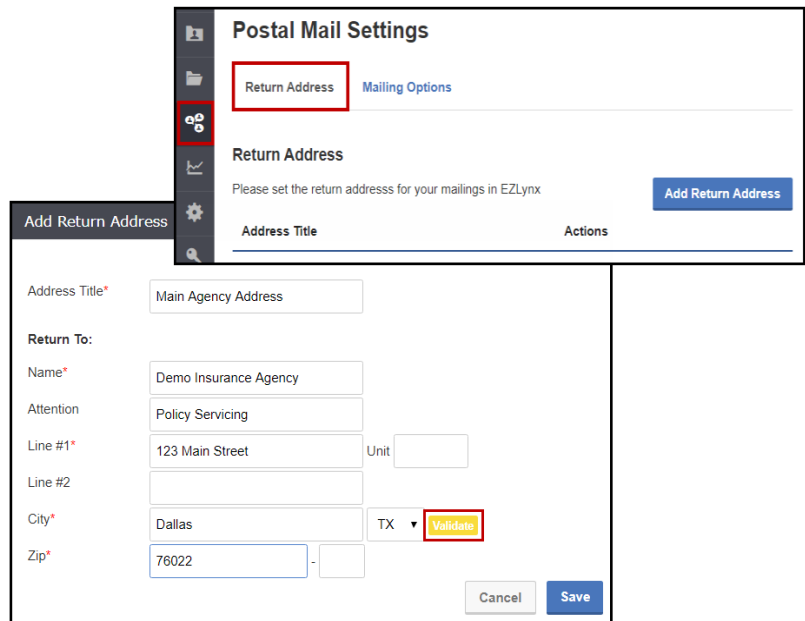
Before anyone in the agency begins using EZLynx Postal Mail, an agency admin completes the following setup tasks.

Set Return Address(es) for Undeliverable Mail

1. Hover over the **Communication Center icon**, and at **Postal Mail**, select **Settings**.
2. At the **Return Address** tab, click the **Add Return Address** button.
3. Create an **Address Title**, or name.
4. **Enter the address** the post office will use to return undeliverable mail.
5. Click the **Validate** button, then **Save**.
6. Repeat the steps above to add other return addresses, if you’d like.

Set Default Mailing Options

1. Hover over the **Communication Center icon**, and at **Postal Mail**, select **Settings**.
2. At the **Mailing Options** tab, select the options that will default when scheduling a postal mailing. User can make changes to these default settings when scheduling a mailing, unless you lock the default option.



The screenshot shows the 'Postal Mail Settings' interface. The 'Return Address' tab is selected and highlighted with a red box. Below it, the 'Add Return Address' form is visible. The form includes the following fields:

- Address Title***: Main Agency Address
- Return To:**
 - Name***: Demo Insurance Agency
 - Attention**: Policy Servicing
 - Line #1***: 123 Main Street (Unit field is empty)
 - Line #2**: (empty)
 - City***: Dallas (State dropdown is TX, Validate button is highlighted in yellow)
 - Zip***: 76022

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.

- **Color:** print in **black & white** or **color**.
 - To **lock so users cannot change** the option, use checkbox.
 - Color printing is more expensive.
 - **Printing:** print as **single** or **double sided**.
 - To **lock so users cannot change** the option, use checkbox.
 - **Postage:** mail as **first class** or **certified mail**.
 - **Envelope:** mail as **Number 10** (up to 4 pages) or **Flat** (5 - 46 pages).
3. Click **Save**.

Postal Mail Settings

[Return Address](#) Mailing Options

Default Mailing Options

Please select the default mailing options for the agency.

Color Option	Black And White ▾
Printing Option	Single Side ▾
Postage Option	First Class ▾
Envelope Option	Number 10 ▾

[Save](#)

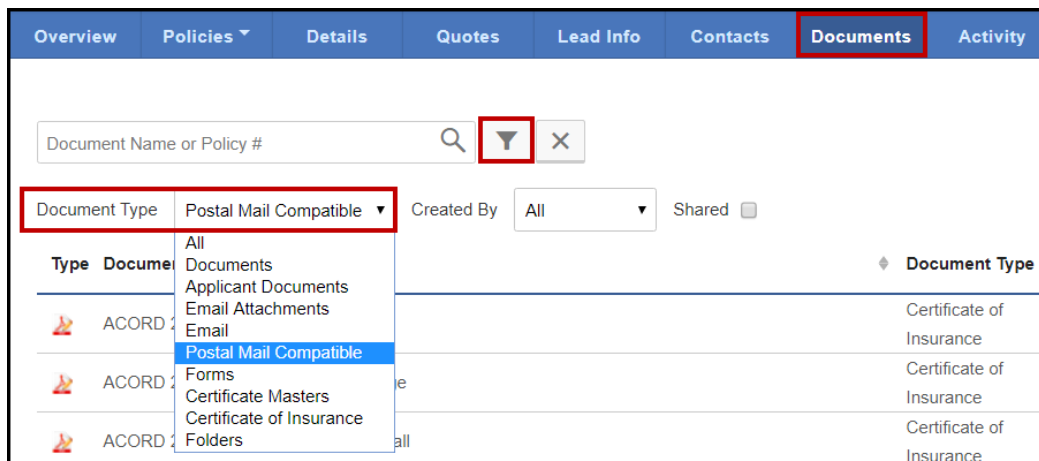
USING POSTAL MAIL (All Users)

Once important insurance related documents are created, agents often mail them to their customers. The time and money related to these mailings can be better spent in other areas, so we've provided a quick and inexpensive way to mail documents directly from applicant accounts.

VIDEO: [EZLynx Postal Mail 101](#) 3 min.

To schedule a postal mailing:

1. Access the **applicant**, go to their **Documents tab** and locate a document to mail. **You can add additional documents later in the process.**
 - Document must be available on the Documents tab, so either create the ACORD form in EZLynx or upload it from your computer.
2. To assist with selection, click the **filter (funnel) icon** next the search box, then select **Postal Mail Compatible**. Only PDFs are supported at this time. On the right, click **Actions** and select **Mail**.



The screenshot shows the 'Documents' tab in the EZLynx interface. At the top, there are navigation tabs: Overview, Policies, Details, Quotes, Lead Info, Contacts, **Documents**, and Activity. Below the tabs is a search bar with the placeholder text 'Document Name or Policy #' and a search icon. To the right of the search bar is a funnel icon, which is highlighted with a red box. Below the search bar is a filter dropdown menu, also highlighted with a red box, showing 'Document Type' set to 'Postal Mail Compatible'. The dropdown menu lists various document types: All Documents, Applicant Documents, Email Attachments, Email, **Postal Mail Compatible** (highlighted in blue), Forms, Certificate Masters, Certificate of Insurance, and Folders. To the right of the dropdown menu, there are filters for 'Created By' (set to 'All') and 'Shared' (checkbox). Below the filter menu is a table of documents with columns for 'Type', 'Document', and 'Document Type'. The table lists several ACORD documents, each with a document icon and a 'Document Type' of 'Certificate of Insurance'.

3. Enter a **unique Mailing Title**, and click **Next**.
4. At the bottom of page, next to any document, click **Add Document**, if you'd like.
5. At top of page, **re-order documents** as desired using the **up/down arrows** on the right.
6. Click **Next**.
7. The **Mail To and Return To addresses** pre-fill, but the drop-down menus include other options.
8. The **printing and mailing options** default as set by your agency admin, but you may be able to select other options from the drop-down menus:
 - **Color:** print in **black & white** or **color**.
 - To **lock so users cannot change** the option, use checkbox.
 - Color printing is more expensive.
 - **Printing:** print as **single** or **double sided**.
 - To **lock so users cannot change** the option, use checkbox.
 - **Postage:** mail as **first class** or **certified mail**.
 - **Envelope:** mail as **Number 10** (up to 4 pages) or **Flat** (5 - 46 pages).
9. Note the **Total Charge**, and if you agree – check the **terms and conditions** box.
10. Click **Submit for Proof**.

Postal Mail - Confirm Mailing Choices

Please confirm your mailing choices below. Once you have selected your mailing options, you will need to confirm you understand the terms and conditions before you submit the mailing for printing.

Mailing Title: Demo Mailing

MAIL TO:
Mary Smith
123 Main St
BURNSVILLE, MN 55337-3467

RETURN TO:
EZLynx Example Insurance Agency
Attention: Jane EZLynx
350 Highland Drive 150
Lewisville, TX 75067

Select Color Option

Select Printing Option

Select Postage Option for Delivery

Select Envelope Option

Total Charge **\$0.88**

I agree to the terms and conditions of mailing this document and its corresponding pricing detailed above.

11. Review the mailing proof.
12. Check box to agree to terms and conditions, and click **Submit for Printing**.

NOTE: Mailings scheduled after 8:00 pm CENTRAL TIME are mailed the following day.

Postal Mail - Confirm Mailing Proof

Please review the proof for any errors. Press 'Back' button to make any changes.

BURNSVILLE MN 55337		INSURER D:	
		INSURER E:	
		INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TRIP LTR	TYPE OF INSURANCE	INSO	WVD	POLICY NUMBER	POLICY EFF (MMDDYY)	POLICY EXP (MMDDYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			g1345346	06/22/2017	06/22/2018	EACH OCCURRENCE \$
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
		Y	Y				MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$ 1200
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMPROP AGG \$
	OTHER:						COMBINED SINGLE LIMIT (Per accident) \$
	AUTOMOBILE LIABILITY						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS ONLY						
	<input type="checkbox"/> NON-OWNED AUTOS ONLY						
	UMBRELLA LIAB						EACH OCCURRENCE \$
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR						
	<input type="checkbox"/> CLAIMS-MADE						
	DED						
	RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS LIABILITY						E.L. EACH ACCIDENT \$
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/ MEMBER EXCLUDED? (Mandatory in MN)	Y/N					E.L. DISEASE - EA EMPLOYEE \$
	If yes, describe under DESCRIPTION OF OPERATIONS below	W/A					E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS/LOCATIONS/ VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

These remarks have now been copied from the first interest holder I added, Wells Fargo. You can make changes if

I confirm that the proof above is formatted correctly and that the document(s) are ready to be printed and mailed. I understand that I may not be able to cancel this mailing after it has been submitted.

Places to view mailings:

1. Scheduled mailings are recorded on the applicant's Activities tab.
2. Hover over the **Communications Center icon**, and under **Postal Mail** – select **Mailbox**.

Overview	Policies	Details	Quotes	Lead Info	Contacts	Documents	Activity
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Notes System Log

TODAY

Postal Mail Submitted

Postal Mail - Demo Mailing - Friday, July 21, 2017, is submitted. Recipient name - Mary Smith

Mailbox

Search for mailings Y X

Filter by Agency: All Filter by Status: All

Mailing ID	Mailed To	Mailing Title	Sent By	Agency	Date Created	Postage Rate	Actions
103	Mary Smith	Demo Mailing	Jane EZLynx	EZLynx Example Insurance	07/21/17 10:44 AM	\$0.88	Actions ▾ Cancel View Proof View Mailing Info