



What's New in EZLynx 4.16.04

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

Edit Interest
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Name

Exists in the Master List

Address Line 1

Phone

Email

Address Line 2

Fax

Contact Method

Address Line 3

Mobile

Certificate Holder Type

Additional Insured

General Liability

Commercial Auto

Umbrella/Excess

Other

Waiver of Subrogation

General Liability

Commercial Auto

Umbrella/Excess

Workers Compensation

Other

Remarks - Description of Operations/Locations/Vehicles (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Select Interest Holder

Copy Remark from Interest Holder

Set Size for remarks

The Certificate Holder is listed on the policy as a Loss Payee and an Additional Insured for the Leased Kitchen Equipment

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 pre-fill 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"
 - *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

Add Form Template

Description:

File (*.pdf, *.docx):

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

Edit Field Mappings

Select which **EzLynx field** you want to populate each **template field** with.

Document Field	EzLynx Field
Agency Address	Mailing Address Line One
Agency City	Mailing Address City Name
Agency Name	Name
Agency State	Mailing Address State
Agency Zip	
Agent Signature	
Carrier Name	
Effective Date	
Expiration Date	
Insured Full Name	
Line of Business	
Policy Number	Policy Number
Premium	Written Premium

Assigned Agent

- Policy Number
- Producer Code
- Producer Code Override
- Rating State
- Total Commission %
- Total Commission Amount
- Underwriter Full Name
- Written Premium

Agency Information

- Mailing Address City Name
- Mailing Address Line One
- Mailing Address Line Two
- Mailing Address State**
- Mailing Address Zip Code
- Name

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.

Underwriting Requests
Final Price (30 Days)
(25)
Final Price (7 Days)
(12)
Final Price (Today)
(2)
Bind (30 Days)
(11)
Bind (7 Days)

- NEW Able to see the applicant EZContact box.

The screenshot shows the 'Underwriting Requests' interface. At the top, there are several filter options: Type (Finalize Premium), Status (Please select), Request Date, Requested By (Type here to search), Last Updated (03/22/2016 - 04/21/2016), State (Please select), Recipients (Please select), and Agency (Select an Agency). Below the filters is a table of requests with columns for Last Updated, Request Date, Type, Status, Agency, State, Requested By, Updated By, Applicant, Carrier LOB, and Actions.

Last Updated	Request Date	Type	Status	Agency	State	Requested By	Updated By	Applicant	Carrier LOB	Actions
4/21/2016 11:47 AM	4/21/2016 11:47 AM	Finalize Premium	Initial Request	MGA Branch Insurance Agency	Texas	MGABranch UserOne	MGABranch UserOne	Richards, Will	Safeco Insurance / Auto	View Cancel
4/21/2016 11:45 AM	4/21/2016 10:37 AM	Finalize Premium	Complete	MGA Branch Insurance Agency	Texas	MGABranch UserOne	MGAAdmin UserOne	Sherlock Holmes	Safeco Insurance / Auto	View Cancel
4/20/2016 8:34 PM	4/20/2016 8:32 PM	Finalize Premium	Initial Request	MGA Branch Insurance Agency	Texas	MGABranch UserOne	MGABranch UserOne	PHONE NUMBERS	Safeco Insurance / Auto	View Cancel
4/20/2016 5:43 PM	4/20/2016 4:03 PM	Finalize Premium	Cancelled - Carrier Declined	MGA Branch Insurance Agency	Texas	MGABranch UserOne	MGAAdmin UserOne	Home: (111) 111-1111	Safeco Insurance / Auto	View
4/20/2016 4:15 PM	4/20/2016 4:14 PM	Finalize Premium	Cancelled - Customer Declined	MGA Branch Insurance Agency	Texas	MGABranch UserOne	MGABranch UserOne		Safeco Insurance / Home	View

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.

Underwriting Request

Finalize Request

Initial Request

Request Subject Safeco Insurance Auto Finalize Premium for: Richards, Will
Requested By MGABranch UserOne (MGA Branch Insurance Agency) on 4/21/16 11:47 AM
Underwriter

- x MGAAdmin UserOne
- x MGAAdmin UserTwo
- x MGAUnderwriter UserThree

Comments

Hide system comments Sorting: Newest First

System added a comment - 4/21/16 11:47 AM
mgabranh1 has updated the request.

MGABranch UserOne added a comment - 4/21/16 11:47 AM
Please finalize quote

Add Comment

Quote Summary

QUOTE DETAILS

Quoted Premium \$2,320.00 @12 Month Premium
Quote Number 2004815
Carrier Safeco Insurance
LOB Auto
Applicant Richards, Will
Finalized Premium \$ 0

DRIVER INFO

Name	DOB	Complete	State
Richards, Will	10/10/1985	Closed	IL
Richards, Wilma	12/12/1975	Cancelled - Carrier Declined	TX

VEHICLE INFO

Year	Make

Information Requested

- Complete
- Closed
- Cancelled - Carrier Declined
- Cancelled - Customer Declined
- Cancelled - Agent Declined
- Cancelled - Request Expired
- Cancelled - No Response

Change Status **Cancel** **Save**

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.

Agency Admin - Shared Carrier Logins

My Carrier Logins MGA Admin Insurance Agency Shared Logins

INSTRUCTIONS

SHARED LOGINS

CENTAURI INSURANCE State Specific Logins

Rating State	User Name	Login Status for Rating State	Actions
Default	Ezlytc	✔ Username and password valid	Set Test Clear
FL	EZLYNXFL	✔ Username and password valid	Set Test Clear

ENCOMPASS State Specific Logins

Rating State	User Name	Login Status for Rating State	Actions
Default	a01281	✔ Username and password valid	Set Test Clear

HARTFORD State Specific Logins

Rating State	User Name	Login Status for Rating State	Actions
Default	picvstlg	✔ Username and password valid	Set Test Clear

My Carrier Logins			
INSTRUCTIONS ▾			
INDEPENDENT ACCOUNTS			
21ST CENTURY INSURANCE			<input type="checkbox"/> State Specific Logins
Rating State	User Name	Login Status for Rating State	Actions
Default	N/A	✔ Username and password not required	Set Test Clear
ALLIED			<input type="checkbox"/> State Specific Logins
Rating State	User Name	Login Status for Rating State	Actions
Default		✘ No Default Login is set. Please click 'Set' to enter the carrier logins.	Set Test Clear
ENCOMPASS			<input type="checkbox"/> State Specific Logins
Rating State	User Name	Login Status for Rating State	Actions
Default		✘ No Default Login is set. Please click 'Set' to enter the carrier logins.	Set Test Clear
SHARED ACCOUNTS			
HARTFORD			
Rating State	Login Status for Rating State		
Default	✔ Quoting is Enabled		
SAFECO INSURANCE			
Rating State	Login Status for Rating State		
Default	✔ Quoting is Enabled		

EZLynx Management System - Commissions

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