

EZLynx Management System has a process for matching policy downloads to existing policies or applicants. Downloads that can't be matched and all new Dwelling Fire policies are saved in the system as Unmatched.

How EZLynx Matches Downloads to Policies & Applicants

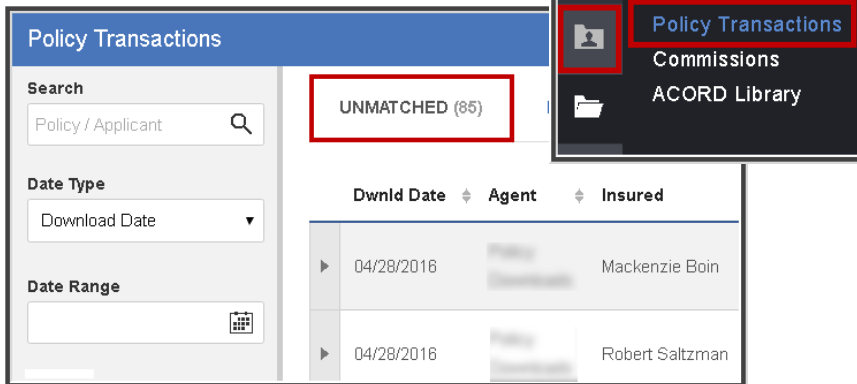
1. EZLynx first attempts to match a policy download to an existing policy. A download **must match**:
 - Policy # (we don't consider policy extensions)
 - Line of business **AND**
 - Writing company's NAIC code
2. If no policy match, EZLynx next attempts to match to an existing applicant based on:
 - Applicant **first and last name, plus SSN, DOB OR zip code.**

Watch the [Working Unmatched Policy Downloads video](#) 6 min.

An admin should work Unmatched policy downloads daily so customer data is up-to-date.

Accessing Unmatched Downloads

1. Go to the **Policy Transactions page** - use one of these options:
 - Go to the **Dashboard Home Page** to the **Downloads box** and click the **All Unmatched** link.
 - Or, hover over the **Policy Mgmt icon**, and click **Policy Transactions**. If you don't have these options, contact support@ezlynx.com.
2. At **Policy Transaction page**, click the **Unmatched tab**.



The screenshot shows the 'Policy Transactions' page. On the left, there is a search bar and filters for 'Date Type' (set to 'Download Date') and 'Date Range'. The main content area shows a table with columns 'Dwnld Date', 'Agent', and 'Insured'. Two rows are visible: one for '04/28/2016' with agent 'Mackenzie Boin' and another for '04/28/2016' with agent 'Robert Saltzman'. A red box highlights the 'UNMATCHED (85)' tab at the top of the table.

Downloads	
All Unmatched	6
(Last 7 Days)	
Cancellations	0
Renewals	0
New Policies	4
Non-Renewals	0
Matched	92
Unmatched	6
Total	102

Working Unmatched Downloads

1. Click a **transaction's gray down arrow** on the left.
2. The system displays either the **potential matches** or a **no possible matches found** message.



Working Unmatched Policy Downloads

EZLynx Management System

Potential Match(es) Found

If one or more potential matches are found, they are displayed here.

1. Click the **applicant's name** to review account before matching.
2. Click the appropriate **Match** button to either **update an existing policy** or **add as a new policy**.

2 Potential Matches Found					
	Account	Type	Policy Number	Status	Carrier
<input type="button" value="Match"/>	Hart & Rigione	Commercial	PCA0100450926	Active	Preferred Mutual
<input type="button" value="Match"/>	Hart & Rigione	Commercial	PCA0100450906	Inactive	Preferred Mutual

No Possible Matches Found – Find Existing Account or Policy

On occasion, an applicant / policy may exist in the system, yet the system is unable to identify the match.

1. Click the **Find existing account or policy** radio dial.
2. Click **Search**.
3. Type in the **Search** box or check **Advanced Search Options** for a wide variety of filters.
4. Locate the existing applicant, then **Match** or **Create** policy in the Policies area below.

No possible matches found

Find Existing Policies

Find existing account or policy
 Create new account and policy from transaction

Advanced Search Options

Expand the results below to match to an existing policy for the same line of business or create a new policy for an existing customer. To create a new customer from the transaction, select the "Create new account" option above the search bar.

Search on:

First Name
 Last Name
 Middle Name
 Co-Applicant
 Business Name

Email
 Policy Number
 Applicant Id
 City
 Zip Code
 Phone Number

Filter by:

Personal / Commercial:
 Lead Status:
 Applicant Type:
 Lead Source:

Assignment:

Show Only my Applicants
 Show Applicants from specific users

Everyone in my agency and subs

Mary Smith

123 main st Dallas, TX 54354

Phone: Unknown

Alternate Email:

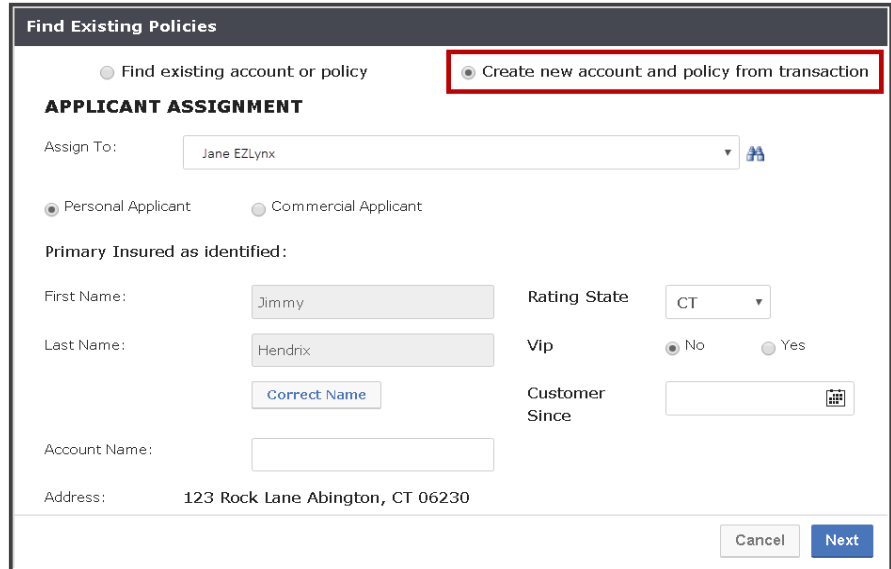
Policies ^

Create a new policy from download

No Possible Match Found – Create New Account & Policy from Transaction

If an applicant or policy doesn't already exist in the system, you can automatically create a new applicant and policy from the unmatched download.

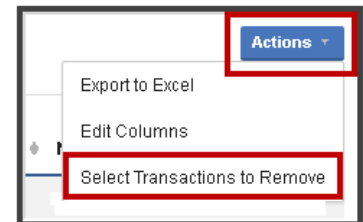
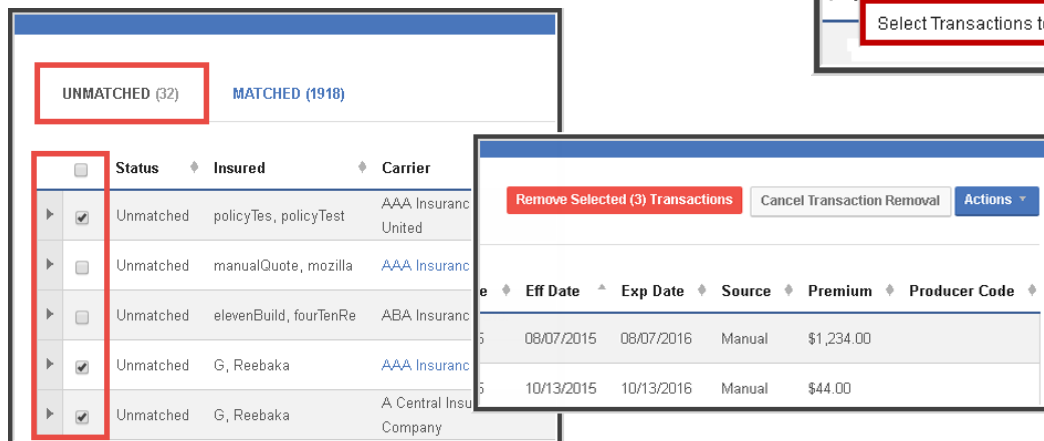
1. Check the **Create new account and policy from transaction** radio dial.
2. At **Assign To**, select a user.
3. Designate the account as **Personal** or **Commercial** lines.
4. Verify the applicant name, and use the **Correct Name** option, if necessary.
5. Complete any other fields as appropriate, click **Next**.
6. Review policy information and edit as necessary.
7. Click **Add Policy**.



Delete Unnecessary Unmatched Policy Downloads

How to delete a single or multiple unnecessary policy transactions.

1. Click any single **transaction's gray down** arrow to access a **Delete** button.
2. Or, to delete multiple transactions at once, go to **Actions** at the upper right and click **Select Transactions to Remove**.
 - o At left, check boxes for the transactions to delete.
 - o Click **Remove Selected Transactions** at far top right of page.

Status	Insured	Carrier
<input checked="" type="checkbox"/>	Unmatched policyTes, policyTest	AAA Insurance United
<input type="checkbox"/>	Unmatched manualQuote, mozilla	AAA Insurance
<input type="checkbox"/>	Unmatched elevenBuild, fourTenRe	ABA Insurance
<input checked="" type="checkbox"/>	Unmatched G, Reebaka	AAA Insurance
<input checked="" type="checkbox"/>	Unmatched G, Reebaka	A Central Insurance Company

Eff Date	Exp Date	Source	Premium	Producer Code
08/07/2015	08/07/2016	Manual	\$1,234.00	
10/13/2015	10/13/2016	Manual	\$44.00	

Questions? Contact support@ezlynx.com.