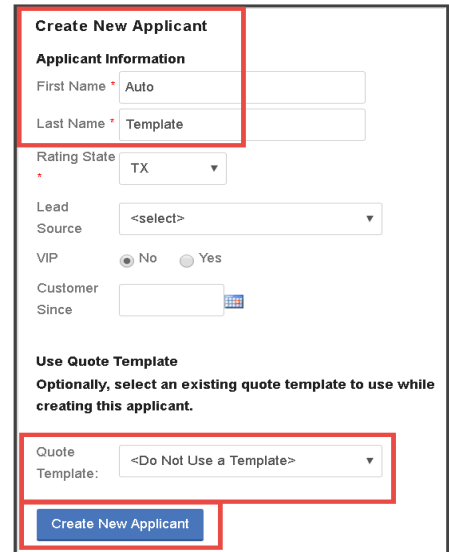


Quote Templates is a time-saving feature that is available to all EZLynx Rating users. Add common answers to rating application questions to a template, for example, certain coverage baskets, then use the template to pre-fill those fields of a new application. Even when a quote template is used, the application answers are editable. Create as many templates as you'd like and share them with all users in the agency.

First, Create a "Template Applicant"

First we'll create a "template applicant" to use to create the quote template. This same template applicant can be used to create several different quote templates, so it is unnecessary to delete the applicant.

- Hover over **Applicants** icon, select **Create New Applicant**.
- Enter Auto (or Home) Template as the applicant's first and last name.
- Set the rating state.
- Skip the **Quote Template** dropdown for now; field is used later.
- Click **Create New Applicant**.



Set the Answers to Pre-fill

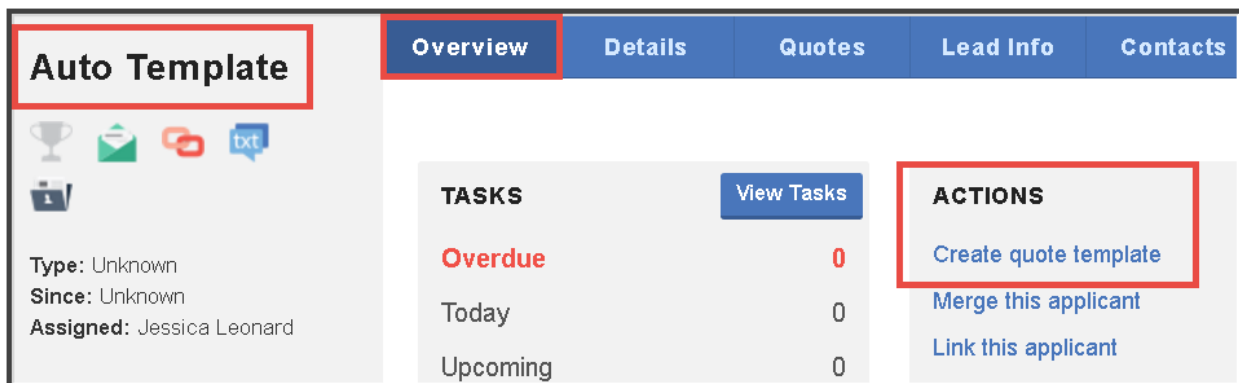
Only set basic information that can be applied to different applicants, such as coverage information, credit check authorization, package discounts, etc...

- At the bottom of the **Details** tab, choose **Save & Go to Auto or Home**.
- Click **Continue** (it's still not time to use a quote template).
- Go through each tab of the rating application and set the answers to pre-fill into new applications when the template is used.

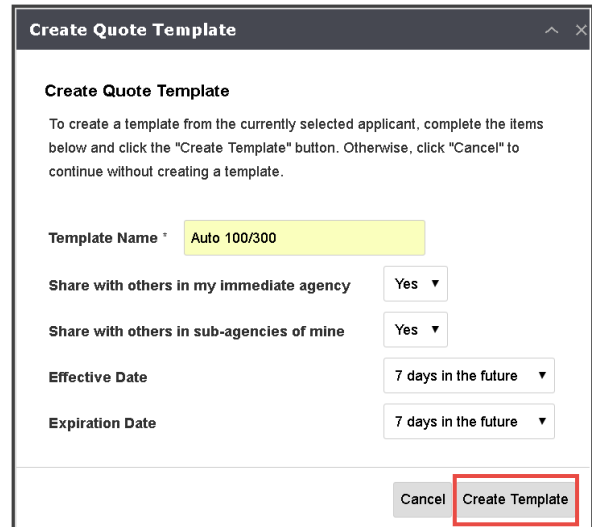
Create the Quote Template

Once the answer are set in the Template applicant's rating application, the quote template is created.

- Click the **Overview** tab.
- At the Actions box, click **Create Quote Template**.



- Name the template.
- If desired, **share the template** with others in the agency or sub-agencies.
- Choose the Effective Date of the new policy and Expiration Date of prior policy – these fields will pre-fill when creating a new application.
 - Useful for automatically applying an advance quote discount that some carriers offer.
- Click **Create Template**.



Using a Quote Template for a New Applicant

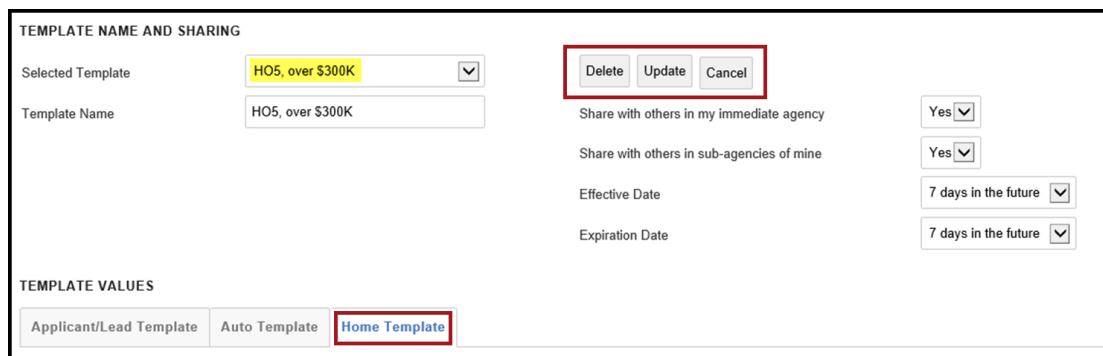
Now that the template is created, it can be used with any new application to pre-fill data and save time.

- Click **Create New Applicant**.
- Complete required fields and select a quote template from the **Quote Template** dropdown.
- Click **Create New Applicant**.
 - The application is now pre-filled with the template answers.

Managing Quote Templates

Quote Templates cannot be edited. If you want different template answers, locate the “template applicant”, make changes to the application, then create a new quote template. The person who created a quote template can update the name/sharing permissions or delete the template (see screenshot below).

- Hover over **Settings** icon, and select **Carrier Quoting Setup**, then **Quote Templates**.
- From the **Selected Template** dropdown, choose a template.
- At Template Values, view the template answers by selecting **Applicant/Lead, Auto or Home** tab.



Questions? Contact support@ezlynx.com