



Setting Carrier Defaults

A Rating Engine Feature

Setting Carrier Defaults makes quoting faster!

Every carrier has specific underwriting questions that must be answered within the EZLynx rating application in order to provide a quote. Carrier Defaults allow EZLynx users to set answers to the carriers' underwriting questions – these default answers then automatically prefill into NEW applications. This makes quoting faster! There is no need to physically select answers to these questions since they prefill from the carrier defaults. Better yet, the user can change the prefilled answers in an application at any time, if desired.

When completing a quoting application within EZLynx, it is very important to enter the correct agent/producer code. The agent/producer code determines where our system places the quote on the carrier site. Therefore, if an incorrect code is entered in EZLynx, the user won't be able to find the quote on the carrier site.

To set Carrier Defaults:

- Hover over the **Settings icon**, and select **Carrier Quoting Setup**, then **Carrier Defaults**.
- At the **Line of Business** drop-down, select **Auto or Home**.
- At the **State** drop-down, select the rating state.
 - Page populates with each carrier's underwriting questions.
- At the upper right, click the **Modify Defaults** button.

Carrier Defaults

VIEW OR MODIFY CARRIER DEFAULTS

To modify your default carrier values, select a state and line of business.

Line of Business: State:

[Modify Defaults](#)

Allied Insurance	Your defaults	Agency defaults
Agency Number	{NOT SET}	{NOT SET}

State Auto Insurance Companies	Your defaults	Agency defaults
Agency Number	{NOT SET}	{NOT SET}
Auto/Home Discount	{NOT SET}	{NOT SET}
AutoXtended Coverage	{NOT SET}	{NOT SET}

Travelers	Your defaults	Agency defaults
Please enter your Travelers assigned Agency ID (Must start with zero (0) and be a total 6 characters)	{NOT SET}	0A0165
If effective date is more than 10 days in the past or 90 days in the future, do you want to change the effective date to today? (If No, quote will fail)	{NOT SET}	{NOT SET}
A discount is added if Quoted 8 days in future from current Effective Date. Select Yes to avail the Discount	{NOT SET}	{NOT SET}



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- The **Your Defaults** column opens so default answers can be set.
 - **Agency Defaults** - there is an option for one user to set the same defaults for everyone in the agency. Contact support@ezlynx.com to setup one user with this capability. Setting Agency Defaults is done from the Admin (key) icon.
- Read each question and set the most common answer. Changes can be made within an application even when the answer pre-fills from a default.
 - If an answer is set in the Agency Defaults column, the answer in the Your Defaults column will override it.
- Once finished, click **Save Changes**.

Allied Insurance	Your defaults	Agency defaults
Agency Number	<input type="text" value="55832"/>	Your Agent Number contains 5 digits. {NOT SET}

[Save Changes](#)

- Defaults should be set for Auto and Home in EACH rating state.
- Whenever the agency adds a new carrier to their Rating Engine account, the Carrier Defaults should be set for the carrier in each rating state before rating with the new carrier.

Questions? Contact support@ezlynx.com.