



CLIENT CENTER USER MANUAL

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Welcome to EZLynx Client Center

EZLynx Client Center is a mobile optimized, time-saving customer self-servicing tool where an agency's customers can view policy information, print policy related documents, upload documents to the agent, submit policy change requests and more. It is mobile responsive for a great experience on cell phones. Best of all, its available 24/7/365, so it's like having an employee that works after hours, weekends and holidays.

AGENCY SETUP TASKS (Admins)

An admin will complete the following agency setup tasks before the agency uses EZLynx Client Center.

1 ♦ Embed Client Center Access on the Agency Website

Once we create your agency's Client Center, we'll send your admin an email that includes:

1. The **Client Center link** - which can be added to email signatures or the body of emails to provide customers with quick access to the Client Center.
2. The **Client Center html code** - used to embed Client Center access on the agency's website.
 - If we're creating an Agency Website for you, we'll take care of this step, otherwise send the html code to your IT person.

From: EZLynx Onboarding Team
Fri 6/2/2017 12:35 PM
To:

EXAMPLE

Please read this entire email and save it for future reference; it contains important information about your Client Center.

Your Client Center Link:
<https://www.agentinsure.com/EzLynxCustomerService/HOSTNAME>

The Client Center link can be pasted into emails or incorporated into email signatures.


Your To-Do List:

- If we are building an EZLynx Agency Website for you, you can skip this next step.
- Embed the Client Center login screen on your website - use the following HTML code:

```
<iframe src="https://www.agentinsure.com/EzLynxCustomerService/HOSTNAME" name="EZLynx Customer Service Portal" height="1500" width="100%"  
frameborder="0">Your browser is unable to display frames. Please <a href="https://www.agentinsure.com/EzLynxCustomerService/HOSTNAME">click here  
secure customer service portal.</iframe>
```

EZLynx Client Center:

- Allows your customers to print ID cards and other documents, submit policy change requests, view policy information and more. It is enhanced for an optimal viewing customers access the Client Center from a mobile device.

 office 877-932-2382 x393
email | website f in

Need Training? Email training@ezlynx.com. Take a look at our [video tutorials](#), sign up for a [webinar](#), or search for answers on the [support site](#).

2 ♦ Add Agency Logo to Client Center

It's a marketing "no-brainer" to brand every page of your website, so we give you the option to add your agency logo to Client Center pages. This must be done in conjunction with adding a logo to your Consumer Quoting portal.

First, upload an agency logo for Consumer Quoting:

1. Hover over the **Settings icon** and select **Consumer Quoting**.
2. Select the **CP to configure** (an agency may have more than one).

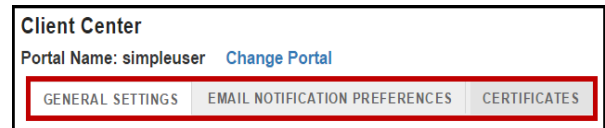
3. Click the **Preferences** tab, and go to **Upload Image to display on Consumer Quoting** area.
4. Click the **Upload Agency Logo** button.
5. Choose the **image file** from your computer.
 - Use a **medium-sized, high-resolution** image. If too large or small, it may be distorted.
 - Only a square image will display correctly in Client Center.
 - Max file size is 1MB.
6. **Crop image**, if desired.
7. Click **Next**.
8. **Preview image**, then click **Done**.

Add the logo to Client Center also:

1. Go to **Do you want to include this image in Client Center?**
 - If a **square image** was uploaded, click **YES**.
 - If a **rectangular image** was uploaded, click **NO**.
 - Click **Upload Client Center Logo**, and upload a square logo image.

3 ♦ Client Center Self Admin

The following agency setup tasks are completed from the **Client Center Self Admin** pages. Self Admin has three tabs; **General Settings, Email Notifications Preferences, and Certificates**.



To access Client Center Self Admin:

Hover over the **Settings icon**, select **Client Center** and from drop-down, pick the **Consumer Portal**.

3.1 Set the Agency Contact Information Displayed in Help Center

The agency's contact information is displayed at the upper right of all Client Center screens and in the Help Center.

1. Go to the **General Settings** tab.
2. Go to **General Preferences>Contact Information in Help Center** area.
3. Click the **Customize** radio dial, and update the information.
4. At bottom right of page, click **Save Changes**.

3.2 Customize the Change Request and Certificate Request Confirmation Messages

When someone submits a change request or certificate request, they receive a confirmation message. Your agency can either use the agency defaults, or customize these messages.

1. Go to the **General Settings** tab.
2. Go to **General Preferences>Request Confirmation** area.
3. Click the **Customize** radio dial, and customize the messages.

- **Change Request Confirmation** is sent when a customer submits a policy or account change request.
 - **Certificate Request Confirmation** is sent when a customer submits a request for the ability to self-generate a certain type of certificate.
4. At bottom right of page, click **Save Changes**.

Request Confirmation:

Use Agency Default
 Customize

Change Request Confirmation: Your request has been submitted successfully, and will be processed within the next 24-48 hours. For immediate assistance, contact our office 877-000-0000.

Certificate Request Confirmation: Your request has been submitted successfully, and will be processed within the next 24-48 hours. For immediate assistance, contact our office 877-000-0000.

3.3 Display Manual Policies (optional)

By default, only downloaded policies are displayed for customers in the Client Center. However, an agency has the option to display manually added policies.

If an agency opts to display manual policies in Client Center, it is **imperative to keep all manual policies in EZLynx up-to-date**. This ensures your customers are viewing accurate information when they log into Client Center.

1. Go to the **General Settings** tab.
2. Go to **General Preferences>Display Options** area.
3. Check the **Show Manually Added Policies** box.
4. At bottom right of page, click **Save Changes**.

Display Options:

Show Manually Added Policies:

3.4 Allow Branches to Access Client Center (optional)

If your agency is setup with branch offices in EZLynx, the main office can share the Client Center with the branch offices. Otherwise, each branch office can obtain their own Client Center.

1. Go to the **General Settings** tab.
2. Go to **General Preferences>Client Center Access** area.
3. At **Allow branches to access Client Center**, check the **Enable** radio dial.
4. At bottom right of page, click **Save Changes**.

NOTE: If a main office shares Client Center with a sub-agency that has their own Consumer Quoting portal, branding for the specific sub agency is displayed to customers. Otherwise, the main office's branding is displayed to customers.

3.5 Set Task Scheduling Preferences

When a customer submits a change request, by default the system automatically creates a task for the applicant's assigned user with a due day of the next business day.

To change who is assigned to these tasks and when they're due:

1. Go to the **General Settings** tab.
2. Go to **Task Scheduling Preferences>Change Requests & Certificate Requests** areas.
3. Use the **radio dials and drop-down** to make changes to tasks.
4. At bottom right of page, click **Save Changes**.

3.6 Set Email Notification Preferences

As customers access and work in the Client Center, emails are sent to EZLynx users to keep them informed of these activities.

To set who receives email notifications:

1. Go to the **Email Notification Preferences** tab.
2. Review each blue, title bar for the **Client Center action** that triggers an email notification.
3. For each action, an **email is sent, by default, to the user assigned to the applicant**.
To send the email notifications to **one or more other people**, click the **Specific User** radio dial.
4. Add any number of email addresses to receive a **copy or blind copy**; separate by commas.
5. At the bottom right of page, click **Save Changes**.

3.7 Enable Certificate Self-Generation Certificate Types and Carriers

The agency can enable certain Certificate Masters so that a customer can log into Client Center, add a certificate holder and generate a certificate on their own. Only certain certificate types and carriers are supported. The certificate's coverage, policy limits, carriers, and policy dates are set by the EZLynx user and cannot be altered by the applicant.

3.7.1 Set Certificate Types (Form Permissions)

The certificate types supported are listed here; currently Certificates of Property, Liability or Garage Insurance.

1. Go to the **Certificates tab**, to the **Certificate Form Permissions** section.
2. Review the **available certificate types**.
3. At the far right of each, click **Enable or Disable**.
4. At the bottom right of page, click **Save Changes**.

3.7.2 Set Carrier Permissions

1. Go to the **Certificates tab**, to the **Carrier Permissions** section.
2. Review the **available carriers** in the box on the right.
3. To enable a carrier, click it in the **Available Carriers** box, use the arrow to **transfer** it to the **Enabled Carriers** box on the left.
4. At the bottom right of page, click **Save Changes**.

USING CLIENT CENTER (All Users)

VIDEO: [EZLynx Client Center 101](#) 9 min.

4 ♦ Client Center Login

4.1 Login Activation

Access to a customer's Client Center account is activated when the corresponding EZLynx applicant account has at least one active, policy. If there are no active, policies in the applicant account, no one can log into the customer's Client Center.

4.2 Who Can Login to an Applicant's Client Center

By default, the applicant and co-applicant can login when an email address is entered in their corresponding primary email field in EZLynx. An EZLynx user can disable these people's ability to login.

To disable an applicant or co-applicant's ability to login:

1. Go to the applicant's **Contacts** tab.
2. Locate the **person to disable**.
3. On the right, click **Edit**.
4. **Uncheck** the **Client Center Access** box.
5. Click **Save**.

4.3 Logging into Client Center

There are two ways a customer can access the Client Center login:

1. Go to the **agency website** and click a **Customer Service** type button.
2. From an **agency email**, click a **Client Center link** embedded in the signature or body of email.

At the Client Center login, customer follows these steps:

1. Enter the **primary email address** entered in the applicant account, and click **Login**.
2. Request the **identification code** via a text message or email.
3. Retrieve and **enter code on the login page** within 15 minutes, and click **Login**.
4. If the email address is associated with more than one applicant account, the customer is prompted to select one.

4.4 Resolving Login Issues

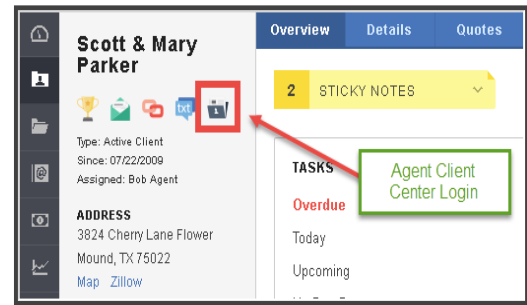
Below are two common issues that prevent a customer from logging into the Client Center and how to fix the issues.

1. The applicant's EZLynx account doesn't have at least one active, *downloaded policy.
 - **Login message:** "The email address you entered does not have active policies".
 - **Fix:** Once the applicant account has at least one active, *downloaded policy, the customer will be able to log into Client Center.
*An agency admin can globally enable all manual policies to be seen in the Client Center ([click here for more information](#)).
2. The email address is not entered in EZLynx as the primary email address for the applicant or co-applicant.
 - **Login message:** "This email address is not found."
 - **Fix:** Go to the applicant's **Contacts** tab, locate the person and click Edit. Add the person's primary email address and click **Save**.

4.5 EZLynx User Quick Login to a Customer's Client Center

Occasionally a user may want to log into a customer's Client Center account. Maybe the customer calls with a question or you simply want to know what the customer can see when they login.

1. Go to the applicant's account.
2. Click the **Client Center (black folder)** icon at the upper left.



5 ♦ Policies Tab in Client Center

The Policies tab provides customers with access to *downloaded, active policy details and the ability to submit change requests.

*NOTE: *An agency admin can globally enable all manual policies to be seen in the Client Center ([click here for more information](#)).

To view policies:

1. Customer clicks the **Policies** tab.
2. Each policy is listed in its own **box**.
3. Click a policy's **View Policy** link.
4. **Details vary** depending on whether the policy was downloaded or added manually.

To submit a change request:

1. Customer clicks the **Policies** tab.
2. Click **Request a Change** at the upper right.
3. From menu on left, locate the **type of change request**, and click its **down arrow**.
4. Click the **more specific type of change request**.
5. Enter the **change request information**, check the **acknowledgement box** and click **Submit**.

NOTE: Changes are not made immediately; all changes require action on the agency's part.

6 ♦ Documents Tab in Client Center

The Documents tab allows for two-way sharing, between a customer and the agent, of important policy related documents.

6.1 Ways Documents are Made Available to Customers

Documents are made available to customers in their Client Center in two ways.

1. When an Auto or Home policy downloads to an applicant's EZLynx account, the following ACORDs are **automatically generated in the system**. This feature saves the agent time and helps an agency provide excellent service.
 - ID Card (ACORD 50 – Auto)
 - Evidence of Insurance (ACORD 27 – Home)
 - Insurance Binder (ACORD 75 – Auto, Home)
2. Go to an **applicant's Documents tab** in EZLynx, and click a document's **Share box** on the right.

6.2 How a Customer Makes a Document Available to the Agent

How a customer makes a document available to the agent:

1. Customer logs into the Client Center.
2. On the **Documents** page, customer clicks **Upload Document** at top right.
3. Once uploaded, documents are immediately available to the agent on the applicant's Documents tab in EZLynx.

6.3 Certificate Self-Generation

When an agency enables the certificate self-generation feature, a user can allow customers to generate certain certificate types for some carriers on their own. The certificate's coverage, policy limits, carriers, and policy dates are set by the EZLynx user and cannot be altered by the applicant.

Step 1: User enables certificate self-generation for a customer's Certificate Master

1. Go to the applicant's **EZLynx Documents tab**, and locate the **Certificate Master**.
NOTE: the Certificate Master must be an enabled certificate type and policy written with an enabled carrier (click here for more information).
2. On the right, go to **Actions** and select **Client Center**.

Step 2: Customer follows these steps to generate a support certificate

1. Go to the **Client Center Documents** tab.
2. Locate the Certificate Master, and click **Add Certificate Holder**.
3. Enter certificate holder information.
4. At prompt asking if current policy meets the Certificate Holder's requirements:
 - **If YES**, the certificate is placed under the Certificate Master with holder's name in the Description field, and customer can click VIEW to access the Certificate.
 - **If No**, the customer is asked why their current policy does not meet the Certificate Holder's requirements, and can upload a document to accompany the Certificate Request.

7 ♦ Help Center in Client Center

Customers access the Help Center by clicking the Question Mark icon at the upper right of all Client Center pages. It has a Contact Us and Frequently Asked Questions sections.

7.1 Contact Us Section

The Contact Us section displays the agency address, phone # and email address. Customers can also submit a question to the agent from here.

EZLYNX EXAMPLE INSURANCE AGENCY - Policies Documents

BACK HELP CENTER

Contact Us

123 Demo Street
Dallas, TX 75028

877-932-2382

insurance@ezlynx.com

I HAVE A QUESTION ABOUT
My Account

RESPOND TO MY QUESTION BY
E-mail scott.parker662@yahoo.com

REQUEST DETAILS

SUBMIT

Frequently Asked Questions

Q: Can I make a payment?
A: No, you will need to contact your agent to find out how best to make your payment.

Q: Why don't I see all of my policies?

To submit a question, the customer:

- Selects a **question type** from drop-down on the left.
- Selects their **email address** for the agent's reply.
- Types **the question** in the box on the right.
- Clicks **Submit**.

7.2 Frequently Asked Questions Section

The Frequently Asked Questions section is below the Contact Us section. Click its plus sign to expand to questions. Click each question's plus sign to expand to the answer. Click any minus sign to collapse the section.

Questions? Contact cqsupport@ezlynx.com.



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