

EZLynx for Outlook is a powerful tool that makes time spent working emails more productive. EZLynx for Outlook automatically matches emails to your Personal and Commercial applicants in EZLynx; emails and attachments can then be saved to applicant accounts for a clear audit trail of communications. This helps keep agent and customer interactions organized, and creates a permanent record for errors and omissions purposes.

Getting Started

EZLynx provides a link used to install EZLynx for Outlook on each computer. Log into your email account and, when prompted, enter your EZLynx username and password. This is only necessary the first login after installation and anytime your EZLynx login is updated.

Once logged in to your email account, notice a new EZLynx for Outlook pane on the right side of the screen. Click the arrow at the lower left to expand or collapse the pane.

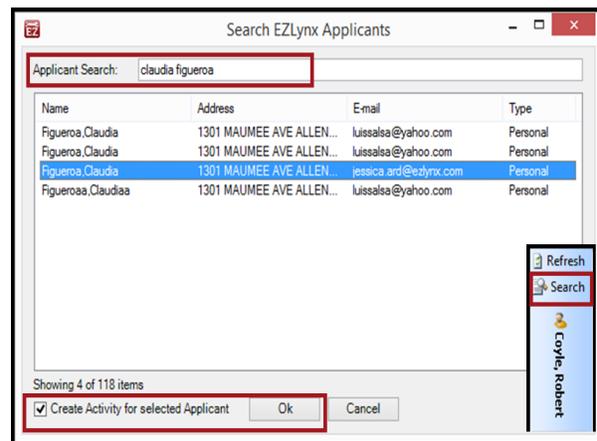


Watch the [Installing EZLynx for Outlook video](#) 4 min.

Locating Applicants

Click an incoming email, and EZLynx for Outlook searches EZLynx for an applicant that matches the incoming email address. If a match is found, the applicant information appears in the pane.

If “No matching applicant found”, but you know the applicant already exists in EZLynx, click the magnifying glass at the top left of EZLynx for Outlook to search for the applicant. This is necessary when the applicant email address is blank or different in EZLynx.



Watch the [Using EZLynx for Outlook](#) video 4 min.

Saving Emails and Attachments

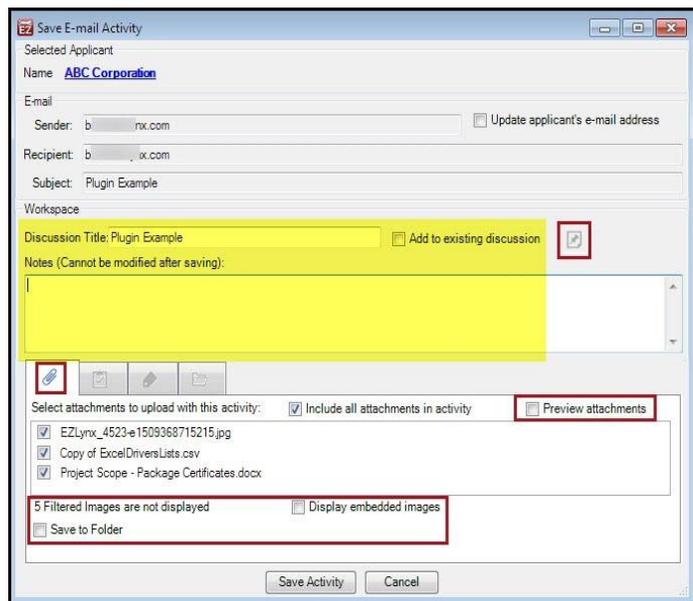
Once the email is matched to an applicant, click the **Save Activity** option on the right. The Save Email Activity box defaults to save all attachments, but you have the option to pick and choose which attachments to save. To preview the files available to attach, check the **Preview Attachments** box to display each file to the right, and decide whether to save it with the activity or not. To remove an attachment, simply uncheck its box

Save to a folder

When the Save to Folder option is checked, a folder selection pop-up appears. **Only one folder can be selected**, but there is a drill down feature to locate folders within folders. Once chosen, any attachments in the email will be saved to that destination.

Add a Note or Sticky Note

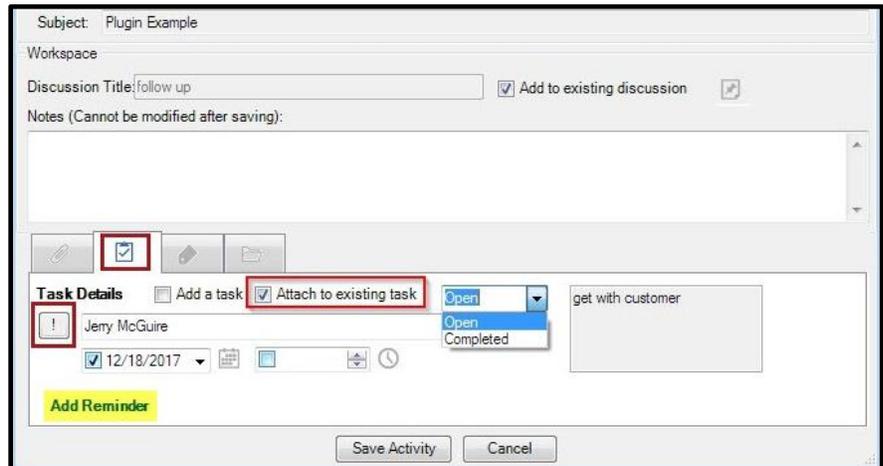
The Notes box is available to add information for future reference. **Please note: once a note is saved, it cannot be edited or deleted;** for E&O purposes. By default, the **Discussion Title** pre-fills with the email's subject line, or check **Add to existing discussion**, if you prefer. The small sticky note icon next to the Discussion Title field will appear gray when not in use and blue when selected to make a sticky note. When the icon is blue, any text in the Notes field will be added as a sticky note to the applicant's Overview screen like it does in the agency workspace.



Add a Task and Reminder

By default, when a user opens the Task tab, the Add a task option will be checked to create a new task.

Click Attach to an existing task, and a pop-up appears with all tasks associated with the applicant. Close the task by changing the status to **Complete**. Users can also update the



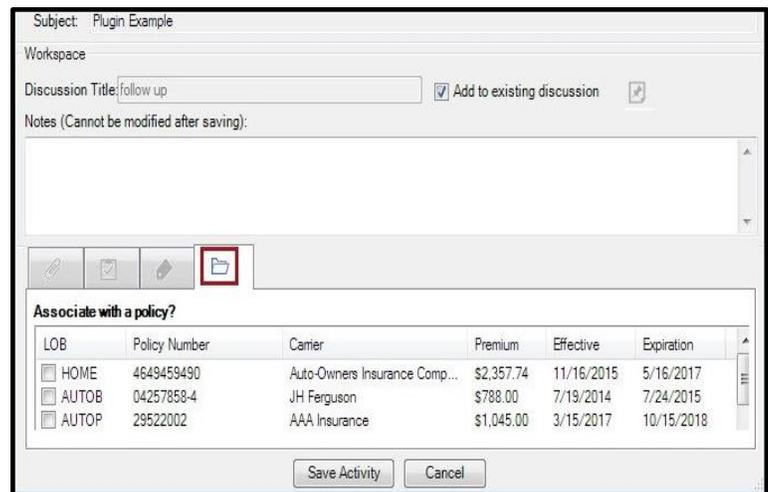
due date or assignee. Use the task description on the right to remember task details when the task was created. Below add or remove a reminder associated with the selected task.

Add a Label

The price tag tab will allow you to add or remove labels. Here all the agency's system and custom labels are displayed. Simply select the desired labels, and they will be saved with the activity.

Associate to a Policy

To associate the email with a specific policy, simply click the last tab & all policies for the applicant will be displayed. Next, click the check box next the policy to associate the email with.



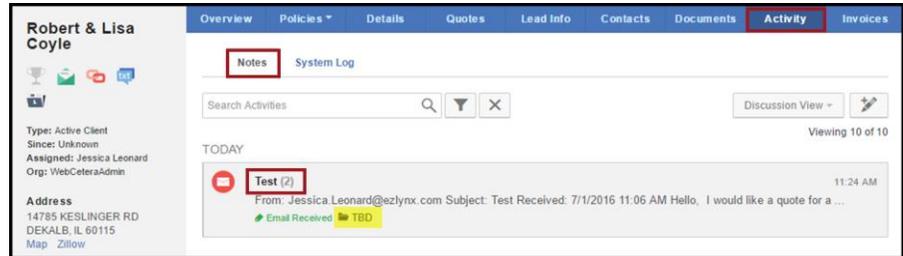
Update applicant's email

Automatically update an applicant's email address by checking the box at the top right of the box. This is a good idea when EZLynx for Outlook was unable to locate the applicant, and will save time in the future.

Access Saved Emails

Emails are saved to an applicant's EZLynx account on the Activity tab.

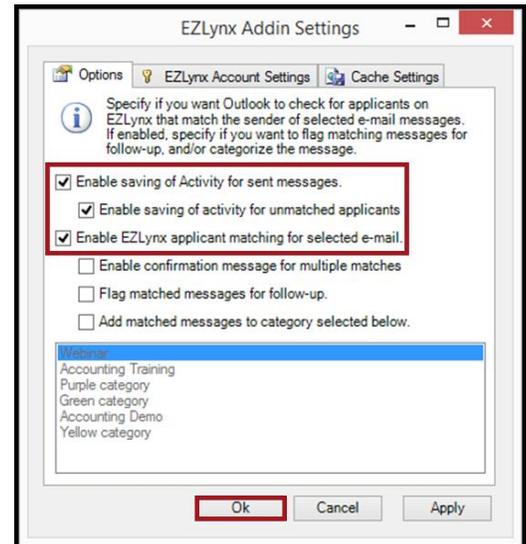
The subject line is displayed, and the remainder of the email is



accessed by clicking the activity. Attachments are stored on applicants' Activity AND Documents tabs. For easy filtering and reporting, a label is automatically applied entitled, "Email Received" or "Email Sent."

Customize Settings

At the lower left of the EZLynx for Outlook pane, click the blue gear icon to quickly customize how it operates. Settings are defaulted to match any incoming or outgoing emails to EZLynx applicants, but this can be turned on and off at any time. Additionally, there are options to flag emails for follow-up and to automatically match emails to a category. Click the EZLynx Account Settings tab to see the EZLynx username and password associated with EZLynx for Outlook or to update the same.



Compatibility

EZLynx for Outlook is currently a Windows based product that is compatible with all email providers when Outlook is installed on the PC. Outlook 365 users can request a desktop version from Microsoft.

Questions? Contact support@ezlynx.com