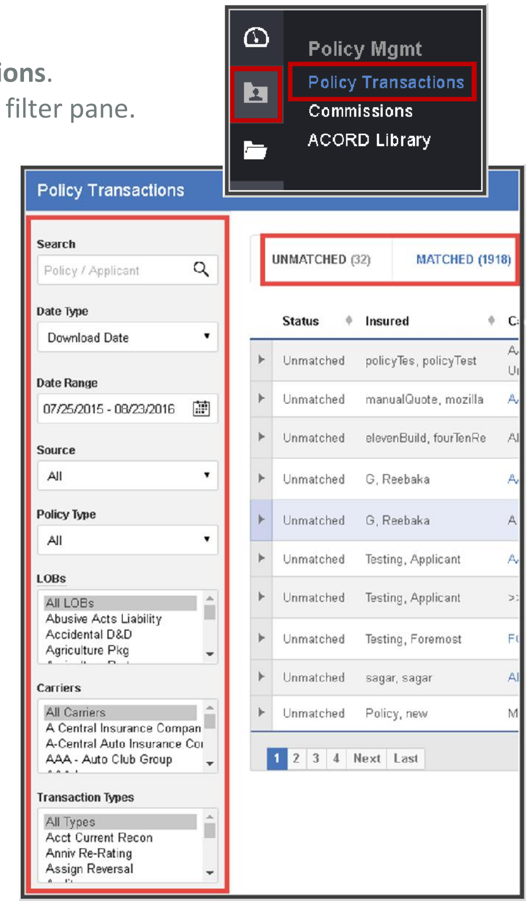
Policy Transactions Page Guide

A Management System Feature

Our Policy Transactions page has two main purposes: a place for quickly locating and working unmatched policy transactions, and a place to filter specific groups of policy transactions. Additional page features include the ability to export policy transaction data to Excel, delete unnecessary unmatched transactions, swiftly analyze and match unmatched transactions to existing applicants or policies, or instantly create new applicants/policies.

To access the Policy Transactions page:

1. Hover over the **Policy Mgmt** icon, and select **Policy Transactions**.
   The page includes two tabs, Unmatched and Matched, and a filter pane.



Filter Panel

A static pane with many filter options is located on the left. The filters are intuitive; information automatically updates as soon as a new filter is set.

1. **Policy/Applicant Search box**: quickly locate a specific policy or applicant.
2. **Date Type**: filter by transaction, download, effective or expiration dates.
3. **Date Range**: defaults to the Last 7 Days, but can be customized by using the Date Range option; simply set date range and click Apply.

Unmatched Policy Transactions

When downloaded carrier transactions enter an agency's EZLynx account, the system matches them to existing applicants. However, occasionally the system cannot locate a definitive match, so the transaction is placed on the Unmatched tab. It is important to review and work these unmatched transactions regularly, in order to keep the management system data up-to-date.

The Unmatched tab includes both transactions that could not be matched to an existing applicant or policy, and transactions that have multiple potential matches.

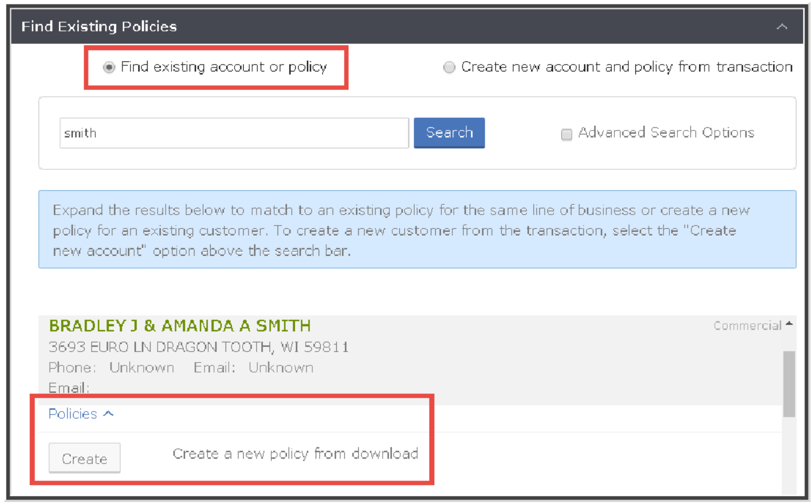
Work an Unmatched Transaction

1. Click the **Unmatched tab**.
2. Expand to additional information by clicking the transaction's **arrow on the left**.
3. **Select one** of these options:
   a. Click **Delete Transaction** – return to the Policy Transaction page and continue working other unmatched transactions.
   b. Click **Search** – continue with steps below.
4. **Select one** of two radio dial options:
   a. Click **Create new account and policy from transaction** (more info below).
   b. Click **Find existing account or policy**, then search for the existing applicant (more info below).
      - Create a new policy or match to an existing policy.

Work a Multiple Matched Transaction

This type of transaction may match an existing applicant/policy, but needs your review for some reason – for example, due to a policy # variation on a renewal.

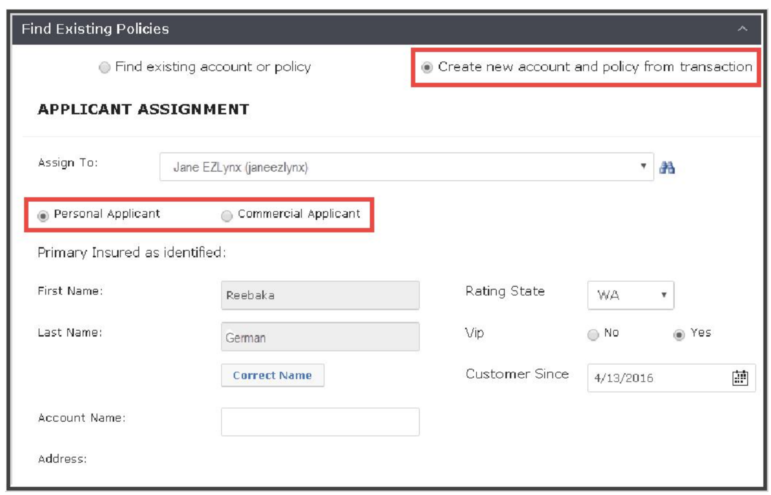
1. Use the “Work an Unmatched Transaction” instructions above, but with one difference – when expanded, the transaction lists possible matches.
2. Select the appropriate match or use one of the radio dials as explained in step 3 above.



Create New Account & Policy from Transaction

When working unmatched transactions, follow these steps to Create New Account and Policy from Transaction.

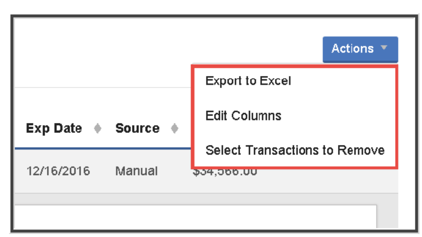
1. At the **Assign To** dropdown, select the EZLynx user to be assigned to the account.
2. Designate the account as **Personal or Commercial** lines.
3. Verify the account name
   - Use the **Correct Name** option, if necessary.
4. Complete any other fields as appropriate, click **Next**.
5. At the **Find Existing Policies box**, check policy information for accuracy.
   - Add or edit any of the policy information if necessary.
6. Click **Add Policy**.
7. Return to the Policy Transactions page, and continue working unmatched transactions.



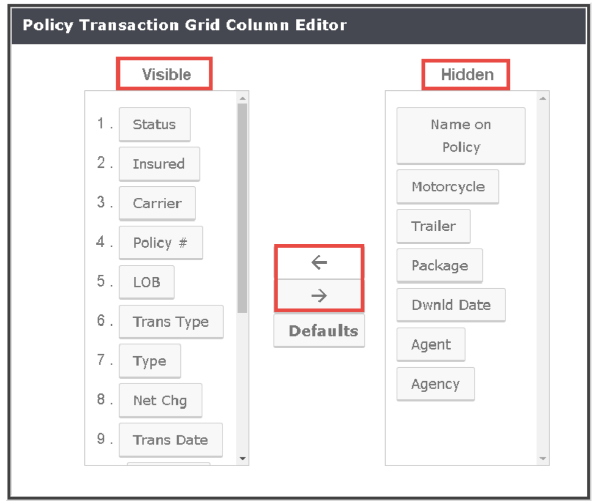
Actions Button Options

A user can perform three tasks from the Actions button at the top right of the Policy Transactions page (may need to scroll page to view).

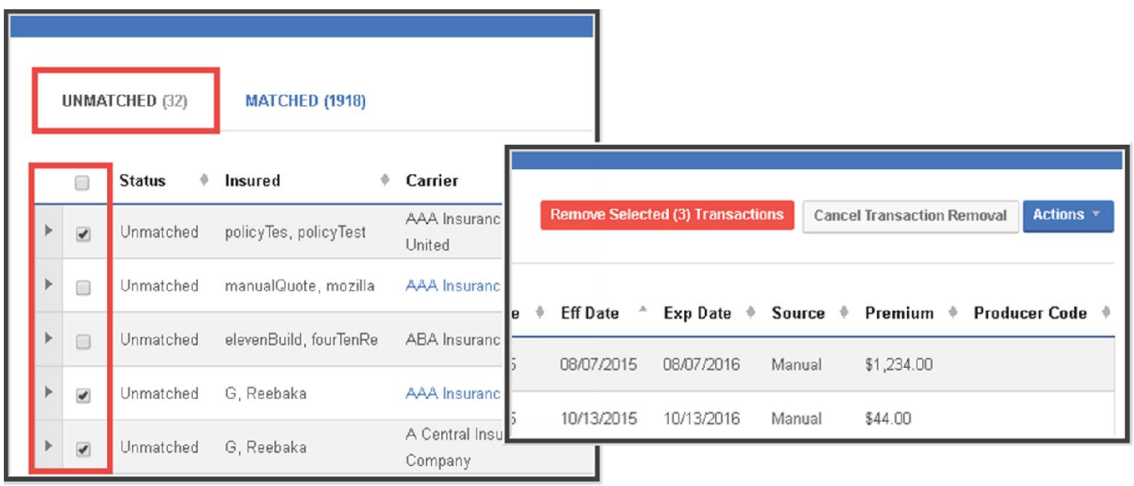
1. **Export to Excel**
   - Export to computer for better sorting.



2. **Edit Columns**
    - Use arrows to move columns between **Visible and Hidden.**
    - Drag and drop columns into any **personalized order**.



3. **Select Transaction to Remove; Bulk Action (only on Unmatched tab)**
   Occasionally, transactions need to be deleted in bulk.
    - Check boxes for the multiple transactions to remove from far left column.
    - Click **Remove Selected Transactions** at far top right of page.
    - **Or**, click **Cancel Transaction Removal**.



Questions? Contact support@ezlynx.com