



Setting Carrier Logins

For Agents with at Least One Independent Account

EZLynx users may have any combination of two carrier account types; Independent or Shared. The term “Independent Account” means the user has the ability to finalize quotes and bind policies directly on the carrier site. Conversely, a “Shared Account” is one that the user does not have the ability to finalize quotes or bind policies – there is likely a brokerage admin or underwriter who performs these tasks on behalf of the user.

To quote with an Independent Account, the carrier logins must be set and kept up-to-date in EZLynx. Also, each time an agency adds a new Independent Account for EZLynx Rating, every user in the agency must set the carrier login before quoting with the newly added carrier. **It is not necessary to set Carrier Logins for Shared Accounts;** this is done by a brokerage admin.

To set Carrier Logins for Independent Accounts:

- Hover over the **Settings icon**, and select **Carrier Quoting Setup**, and land on **Carrier Logins**.
 - All of the agency’s carriers are displayed as either Independent or Shared Accounts.
- At the right of each Independent Account under **Actions**, click **Set**.
- Only check the **State Specific Logins** box if you have a different login for different rating states.

My Carrier Logins

INDEPENDENT ACCOUNTS

INSURANCE COMPANY State Specific Logins

Rating State	User Name	Login Status for Rating State	Actions
Default		✘ No Default Login is set. Please click 'Set' to enter the carrier logins.	Set Test Clear

SPECIALTY State Specific Logins

Rating State	User Name	Login Status for Rating State	Actions
Default	testweb4tx	✔ Username and password valid	Set Test Clear

In the Set Carrier Login box:

- Enter the username and password used to log into the carrier site.
- When prompted, enter any other required information.
- Click **Save & Test**; we test the login on the carrier site to ensure its working.
 - **If successful**, the Login Status displays a green checkmark, and the user can begin rating with the carrier.
 - **If the login fails**, test the login directly on the carrier site. Once the login works on the carrier site, it will set successfully in EZLynx.
 - Every time a carrier site password is updated for any reason, the login must be updated in EZLynx.

Set Carrier Login ✕

Please enter your carrier assigned credentials (carrier site login information)

Carrier: Insurance Company

Rating State: Default

Authenticateuser:

Authenticatepwd:

Questions? Contact support@ezlynx.com.