



Welcome to EZLynx Management System

Congratulations, your agency has been enabled with EZLynx Management System! Now there are important steps for initiating and working with downloads to be done, which requires a collaborative effort between your agency and EZLynx. **Agency to-dos are indicated by checkboxes through this guide.**

EZLynx User Permissions - Downloads Admin vs. Downloads Basic User

1. The agency admin is setup as a Downloads Admin.
 - A Downloads Admin has access to all basic download features, **PLUS** access to commissions, policy management reports and unmatched policies.
 2. All other agency users are setup as Downloads Basic Users.
 - Downloads Basic Users only have access to basic downloads features; they **DO NOT** have access to commissions, policy management reports or unmatched policies.
- To make changes to downloads user permissions, contact downloadsupport@ezlynx.com.

How the Download Process Works

The download process is used to automatically transfer policy information from a carrier to an agency management system. This process saves time and help agencies maintain up-to-date policy information. Many carriers participate in some type of download process, but some carriers do not participate in any download process. Here we will outline the different methods used by downloading carriers.

IVANS Carriers

Most carriers use **IVANS**, an [electronic mailbox provider](#), for the download process. All of an agency's IVANS carriers send electronic downloads to an agency's IVANS account, then EZLynx retrieves the downloads every 15 minutes and matches them to existing EZLynx applicants or creates new applicants.

- Identify if any of your agency's carriers use IVANS; [click here to see which carriers use IVANS](#)
An agency that writes business with any IVANS participating carriers must have an IVANS account.

If your agency already has an IVANS account:

- Contact IVANS and report EZLynx as your management system.
- If your agency is converting to EZLynx from another management system, you must **provide the prior company with a download retrieval cutoff date**, so they stop retrieving downloads from your IVANS account BEFORE EZLynx begins pulling downloads. Otherwise, the prior mgmt. system may retrieve downloads that should be transferred to EZLynx. This results in missing downloads in EZLynx.

If your agency doesn't have an IVANS account:

- Contact any ONE of your IVANS participating carriers to obtain a free IVANS account.
- Send your IVANS Y-account # and user ID to onboarding@ezlynx.com.



TEAM-UP Carriers

Some carriers use **TEAM-UP**, a [special download software](#), for the download process.

- Identify if any of your agency's carriers use TEAM-UP; [click here to see which carriers use TEAM-UP](#)
- If your agency writes business with any TEAM-UP participating carriers, contact any ONE of your TEAM-UP carriers to have the software installed on one agency computer. Once installed, it can be used for all TEAM-UP carriers.

Allstate, Erie, Nationwide and Progressive

These carriers each use their own proprietary software for the download process.

- If your agency writes business with any of these carriers, contact each carrier separately to install their software on one agency computer.
- Once installed, inform us at downloadsupport@ezlynx.com. EZLynx must install our own EZLynx AL3 Transfer Manager software in order to complete the download process.

Non-Downloading Carriers and Lines of Business

Some carriers do not participate in any download process for any agency management system. NO carriers download some lines of business, the most common are health, life & bonds.

- Policies for these carriers and lines of business should be manually entered into EZLynx, so that your management system data is complete.
- Watch a [How and When to Add a Manual Policy](#) video 6 min.

Initiating the Download Process

Agencies new to EZLynx Management System must contact each of their downloading carriers to initiate the process. To have your entire existing book of business (initial load) downloaded to your EZLynx account and to receive daily downloads, follow the instructions below.

- Contact each of your IVANS, TEAM-UP and "proprietary software" carriers to initiate downloads**
 - Provide the **IVANS carriers** with your IVANS Y-Account # and User ID
 - Request daily downloads
 - Make a separate, specific INITIAL LOAD request for each that apply:
 - personal lines
 - commercial lines
 - flood
 - direct bill commissions

Carriers may ask for this general information:

- Vendor = Webcetera
- Product = EZLynx
- Version = 4.0
- Machine Address = N/A (we do not use this)



Working Unmatched Policies

Some downloads may enter your agency's EZLynx account as "unmatched". All unmatched policies are assigned to the Downloads Admin. Downloads Admins are responsible for matching these transactions to an existing applicant or creating a new, and re-assigning the applicant to a different EZLynx user, when appropriate.

- [Working with Unmatched Policies Guide](#)
- All Dwelling Fire policies enter EZLynx as unmatched** because they must be identified as personal or commercial lines.
- Work unmatched policies regularly** so your agency's applicant data is complete and user assignments are correct.

Working with Commissions

- If you're agency is using EZLynx to pay commissions, [review all Commissions training materials](#).

Training Resources

We offer an extensive library of training materials for all of our products and features.

- [EZLynx Management System Manual](#)
- [Register for an EZLynx Management System 101 training webinar](#)
- [Access all EZLynx training materials](#)

Questions? Contact downloadsupport@ezlynx.com