



Salesforce Integration App

ADMIN USER GUIDE



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INTRODUCTION

The EZLynx Salesforce Integration App enables a seamless integration between Salesforce and EZLynx Rating Engine. The fundamental purpose of this integration is to automatically create EZLynx applicants from Salesforce leads and to transfer quote data back to Salesforce. The integration requires nominal agency effort, and there is little to no IT support needed.

With the EZLynx application, agents save time by eliminating the need to perform double data entry. As a result, agents can focus on driving customers from lead to policyholder in less time.

1. App Requirements

To use the EZLynx Salesforce Integration App, the agency must have both active Salesforce and EZLynx accounts. The EZLynx app is compatible with all Salesforce versions, but not Salesforce mobile.

2. App Installation

NOTE	Before installing the EZLynx Salesforce Integration App, make sure the application is enabled on your EZLynx account. For assistance, contact support@ezlynx.com .
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1. To begin the installation, go to the [Salesforce AppExchange](#) and search for EZLynx.
2. Follow the installation prompts.

APP SETUP

In order to use the app, the user must completed setup steps within both their Salesforce and EZLynx accounts. We'll guide you through the setup for both accounts in the following sections.

1. New Salesforce Account Setup

The following app instructions are for specifically for people who are setting up a new Salesforce account in tandem with setting up the EZLynx Salesforce Integration App. If you have an existing Salesforce account and are setting up integration with EZLynx, please go to [Existing Salesforce Account Setup](#).

1.1 Enable Permission Set Assignments

- a. Click your username at upper right.
- b. Select [Setup](#).
- c. At left; click [My Personal Information](#), select [Personal Information](#).
- d. Scroll down to [Permission Set Assignments](#) and click [Edit Assignments](#).
- e. Move [EZLynx User Permission](#) from [Available Permission Sets](#) to [Enabled Sets](#) and [Save](#).



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Permission Set Assignments		Permission Set Assignments Help ?
Edit Assignments		
Action	Permission Set Label	Date Assigned
Del	EZLynx User	2/10/2016

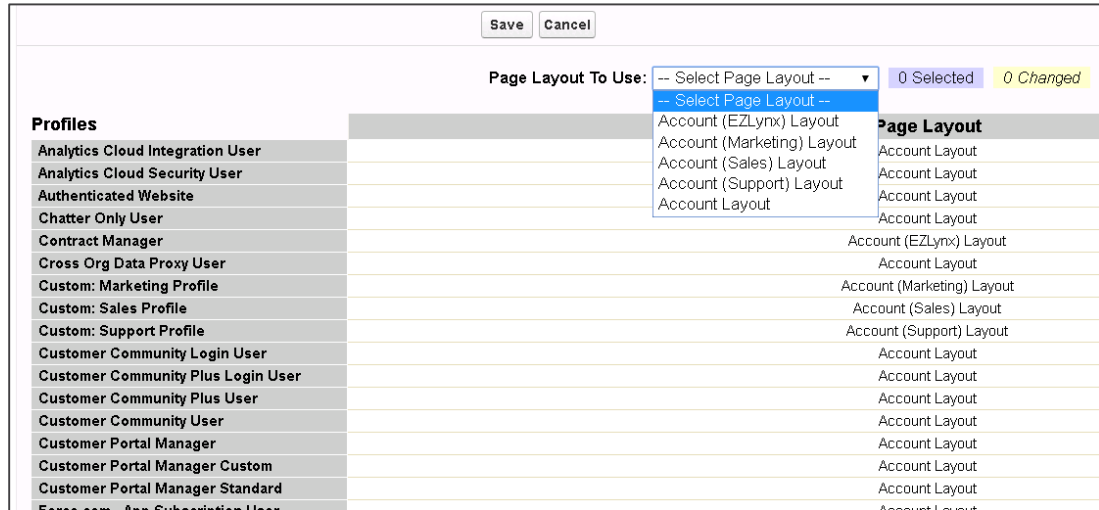
1.2 Customize Lead Page Layout Assignments

1. Click your username at upper right.
2. Select [Setup](#).
3. At left, go to [App Setup](#) area > [Customize](#) > [Leads](#) > [Page Layouts](#).
4. Click the [Page Layout Assignment](#) > [Edit Assignment](#).
5. At [Page Layout to Use](#) dropdown, select [Lead \(EZLynx\) Layout](#).
6. Click [Save](#).

Profiles	Page Layout To Use:	Page Layout
Analytics Cloud Integration User	Lead (EZLynx) Layout	Lead Layout
Analytics Cloud Security User	Lead (EZLynx - with hidden) Layout	Lead Layout
Contract Manager	Lead (Marketing) Layout	Lead Layout
Custom: Marketing Profile	Lead (Sales) Layout	Lead Layout
Custom: Sales Profile	Lead (Support) Layout	Lead Layout
Custom: Support Profile	Lead (Marketing) Layout	Lead Layout
Gold Partner User	Lead (Sales) Layout	Lead Layout
Marketing User	Lead (Support) Layout	Lead Layout
Partner Community Login User	Lead Layout	Lead Layout
Partner Community User	Lead (EZLynx) Layout	Lead Layout
Partner User	Lead (EZLynx) Layout	Lead Layout
Read Only	Lead Layout	Lead Layout
Service Cloud	Lead Layout	Lead Layout
Silver Partner User	Lead (EZLynx) Layout	Lead Layout
Solution Manager	Lead (EZLynx) Layout	Lead Layout

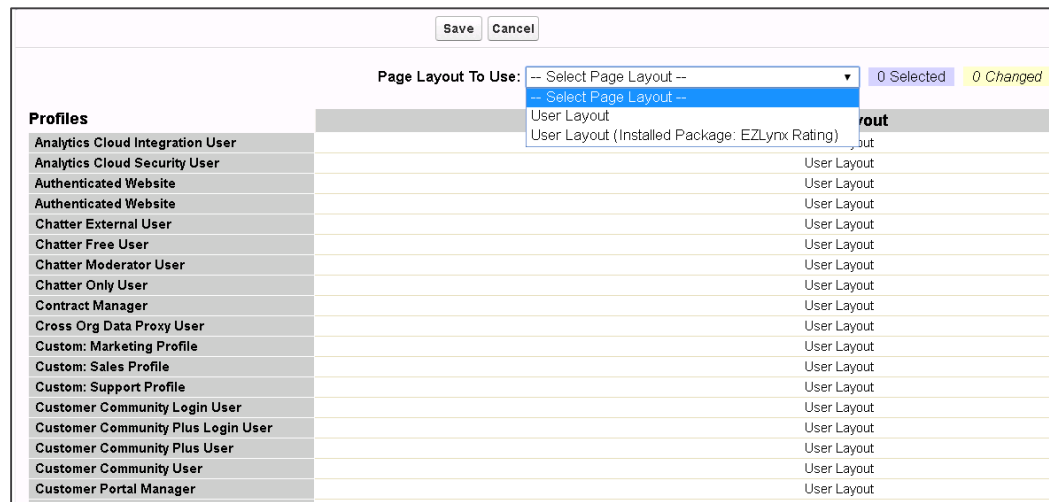
1.3 Customize Account Page Layout Assignments

1. Click your username at upper right.
2. Select [Setup](#).
3. At left, go back to [App Setup](#) area > [Customize](#) > [Accounts](#) > [Page Layouts](#).
4. Click the [Page Layout Assignment](#) > [Edit Assignment](#).
5. At [Page Layout to Use](#) dropdown, select [Account \(EZLynx\) Layout](#).
6. Click [Save](#).



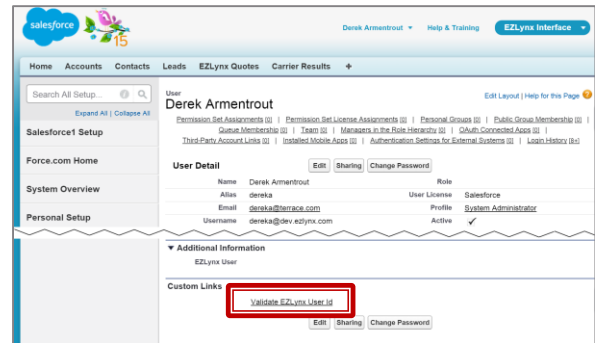
1.4 Customize User Page Layout Assignments

1. Click your username at upper right.
2. Select [Setup](#).
3. At left, go back to [App Setup](#) area > [Customize](#) > [Users](#) > [Page Layouts](#).
4. Click the [Page Layout Assignment](#) > [Edit Assignment](#).
5. At [Page Layout to Use](#) dropdown, select [User Layout \(Installed Package: EZLynx Rating\)](#).
6. Click [Save](#).



1.5 Validate EZLynx User ID

1. Click your username at upper right.
2. Select [Setup](#).
3. At left, go to the [Personal Setup](#) area, click [My Personal Information](#), select [Personal Information](#), and click [Edit](#).
4. Enter your [General Information](#), [Time Zone](#) and [Language](#), and [Save](#).
5. Scroll down to [Custom Links](#) and click [Validate EZLynx User ID](#); enter your EZLynx username and password, then click [Verify User](#).



NOTE

If the Validate EZLynx User ID link is not displayed in your Custom Links area, complete the additional steps below.

1.5.1 Add the Validate EZLynx User ID link to Custom Link

1. At top left, click [Edit Layout](#) link.
2. From [User Layout](#) box, drag and drop [Validate EZLynx User ID](#) to the [Custom Links](#) area below.
3. Click [Save](#) at top left of [User Layout](#) box.

Custom Links (Header visible on detail only)
Validate EZLynx User Id

1.6 Customize EZLynx Quotes Page View

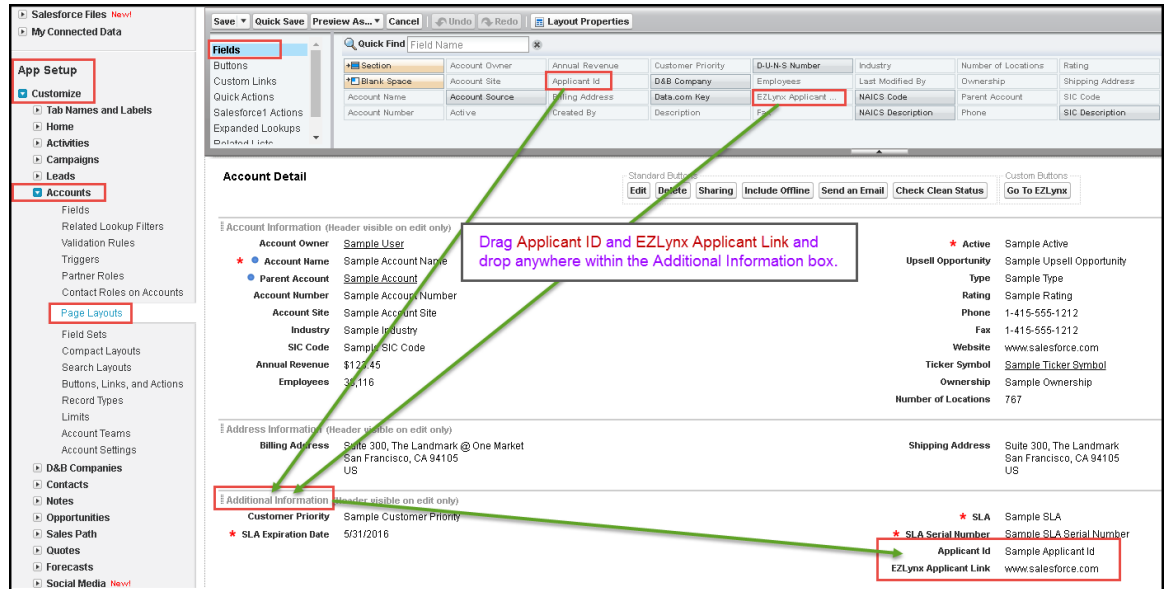
1. Click the [EZLynx Quotes](#) tab at the top of your Salesforce account.
2. At [View](#), click the [Create New View](#) link.
3. Enter a [View Name](#), such as [EZLynx Quotes](#).
4. At [Select Fields to Display](#) boxes, decide which available fields to move to selected fields; we recommend selecting the [Lead](#) field, in order to display applicant name.

2. Existing Salesforce Account Setup

The following app instructions are for specifically for people who are setting up a new Salesforce account in tandem with setting up the EZLynx Salesforce Integration App. If you have an existing Salesforce account and are setting up integration with EZLynx, please go to [New Salesforce Account Setup](#).

2.1 Customize Account & Lead Page Layouts

1. Click your username at upper right.
2. Select [Setup](#).
3. At left, go back to [App Setup](#) area > [Customize](#) > [Accounts](#) > [Page Layouts](#).
4. Locate the EZLynx page layout, and click [Edit](#) at left.
5. At **Fields**, drag and drop [Applicant ID](#) and [EZLynx Applicant Link](#) boxes into the [Additional Information](#) area.



Fields

Section	Account Owner	Annual Revenue	Customer Priority	D-U-M-S Number	Industry	Number of Locations	Rating
Blank Space	Account Site	Applicant Id	D&B Company	Employees	Last Modified By	Ownership	Shipping Address
Account Name	Account Source	Billing Address	D&B.com Key	EZLynx Applicant Link	NAICS Code	Parent Account	SIC Code
Account Number	Active	Created By	Description	Field	NAICS Description	Phone	SIC Description

Buttons

Check Clean Status	Get Contacts	Send an Email
Company Hierarchy	Go To EZLynx	Sharing
Delete	Include Offline	Submit for Approval
Edit	Prospecting Insights	

Account Detail

Account Information (header visible on edit only)

- Account Owner: Sample User
- Account Name: Sample Account Name
- Parent Account: Sample Account
- Account Number: Sample Account Number
- Account Site: Sample Account Site
- Industry: Sample Industry
- SIC Code: Sample SIC Code
- Annual Revenue: \$12,45
- Employees: 3,116

Address Information (header visible on edit only)

Billing Address: Suite 300, The Landmark @ One Market, San Francisco, CA 94105, US

Shipping Address: Suite 300, The Landmark, San Francisco, CA 94105, US

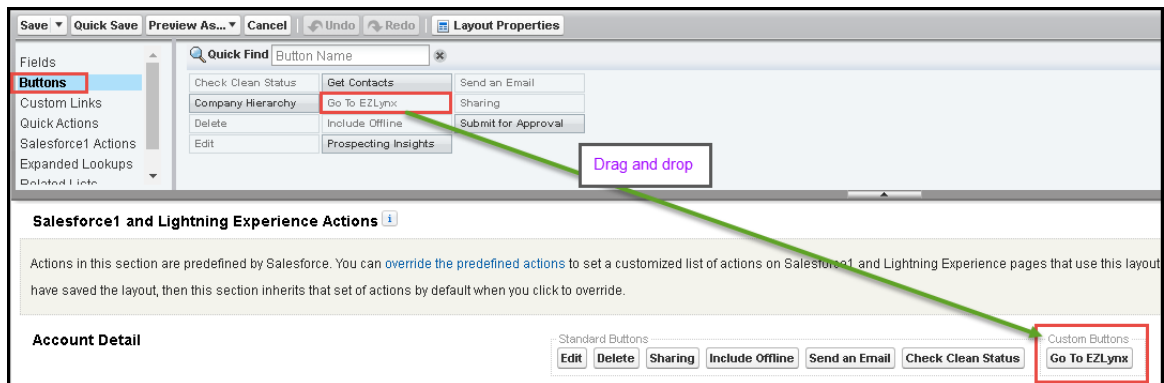
Additional Information (header visible on edit only)

- Customer Priority: Sample Customer Priority
- SLA Expiration Date: 5/31/2016
- SLA: Sample SLA
- SLA Serial Number: Sample SLA Serial Number
- Applicant Id: Sample Applicant Id
- EZLynx Applicant Link: www.salesforce.com

Standard Buttons: Edit, Delete, Sharing, Include Offline, Send an Email, Check Clean Status

Custom Buttons: Go To EZLynx

6. Change Fields to **Buttons**, drag and drop [Go to EZLynx](#) button to the Custom Buttons area.



Buttons

Check Clean Status	Get Contacts	Send an Email
Company Hierarchy	Go To EZLynx	Sharing
Delete	Include Offline	Submit for Approval
Edit	Prospecting Insights	

Standard Buttons: Edit, Delete, Sharing, Include Offline, Send an Email, Check Clean Status

Custom Buttons: Go To EZLynx

7. Change Buttons to **Related Lists**, drag and drop [EZLynx Quotes](#) into the **Related Lists** area.

8. Click [Save](#).

9. At left, go back to [App Setup](#) area > [Customize](#) > [Leads](#) > [Page Layouts](#).

10. Repeat steps 4 through 8 above.



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2.2 Validate EZLynx User ID

These steps are exactly the same as those we've previously outlined in this guide. Click here for instructions about how to [Validate EZLynx User ID](#).

3. EZLynx Account Setup

3.1 Authorize Salesforce Settings in EZLynx

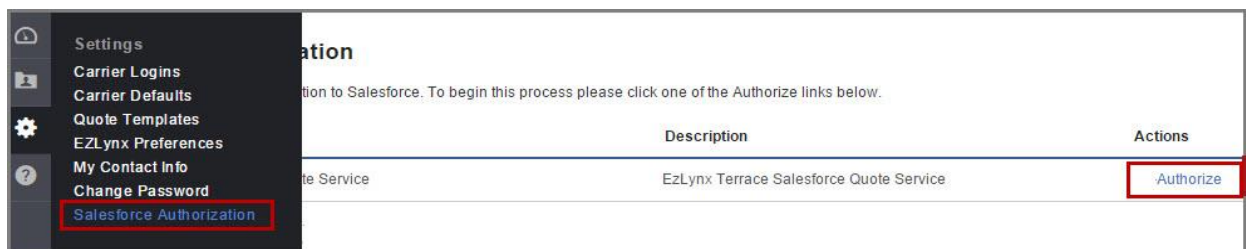
1. Log into your EZLynx account.
2. Hover over the [Settings](#) icon, and select [Salesforce Authorization](#).
3. Click [Authorize](#) at far right.

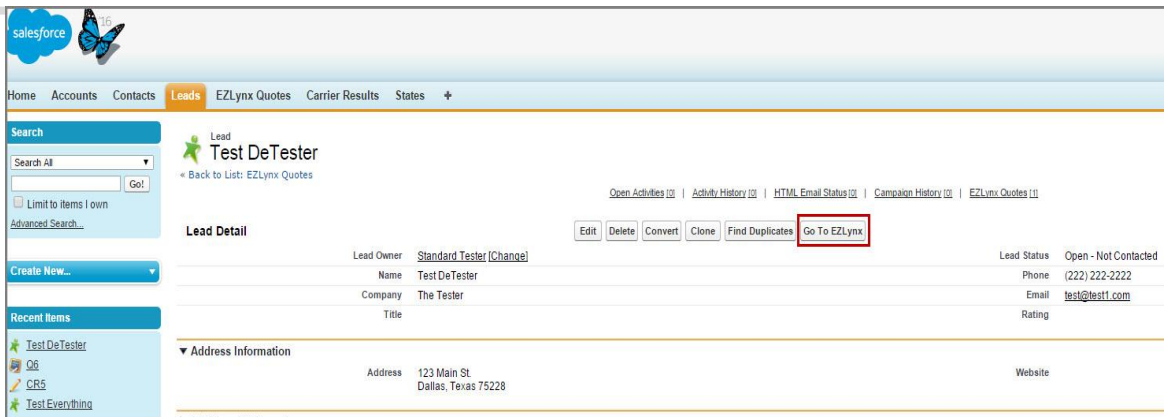
USING THE APP

1. Bridging a Salesforce Lead to Create an EZLynx Applicant

1. Create a new lead or locate an existing lead in Salesforce.

NOTE	When creating a new Salesforce lead, the Company field is required. Since Company does not apply to an EZLynx personal lines applicant, we suggest adding the lead name a second time in the Company field.
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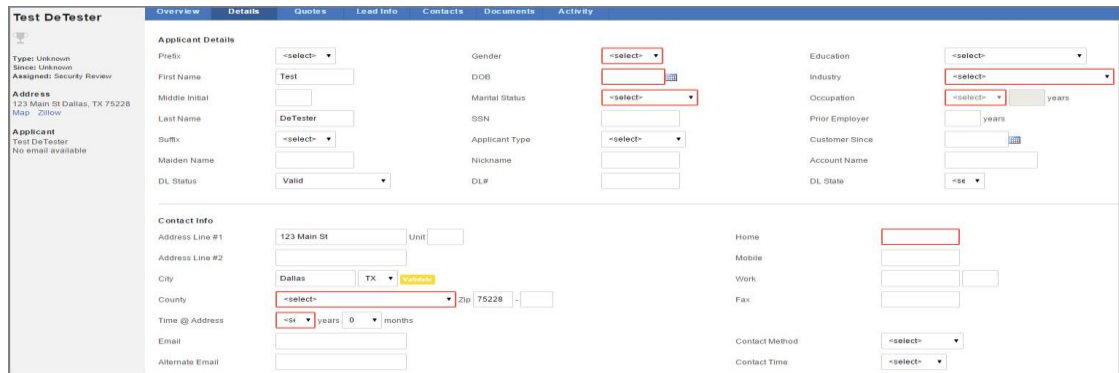
2. Before bridging a lead, enter the fields required by EZLynx:
 - a. Lead first and last name
 - b. Street, city, state and zip code
3. The phone # and email address will transfer to EZLynx if entered in Salesforce, but these fields are optional.
4. To transfer the lead, click the [Go to EZLynx](#) button at the upper right.
 - a. If the lead already exists in EZLynx, you will land on the existing applicant's Overview tab.
 - b. If the lead is new to EZLynx, a new applicant account is created in EZLynx.
 - c. You will be prompted to enter the lead first/last name and address if they have not been entered into Salesforce.

2. Automatic Transfer of EZLynx Quote Data to Salesforce

1. From an Applicant's EZLynx account, click the [Details](#) tab, and complete all required fields.
2. Complete the auto and/or home rating application to quote as usual.
3. Quote data automatically transferred to Salesforce:

• Quote execution ID	Amount	Line of business	Amount Text
• Policy Term	Carrier name	Total premium	

(see screenshot on next page)



Test De Tester

Type: Unknown
 Since: Unknown
 Assigned: Security Review

Address
 123 Main St Dallas, TX 75228
 Map · Zoom

Applicant
 Test De Tester
 No email available

Applicant Details

Prefix: Gender:
 First Name: DOB:
 Middle Initial: Marital Status:
 Last Name: SSN:
 Suffix: Applicant Type:
 Maiden Name: Nickname:
 DL Status: DL#:

Contact Info

Address Line #1: Unit:
 Address Line #2:
 City: TX
 County: Zip:
 Time @ Address: years months
 Email:
 Alternate Email:

Home:
 Mobile:
 Work:
 Fax:

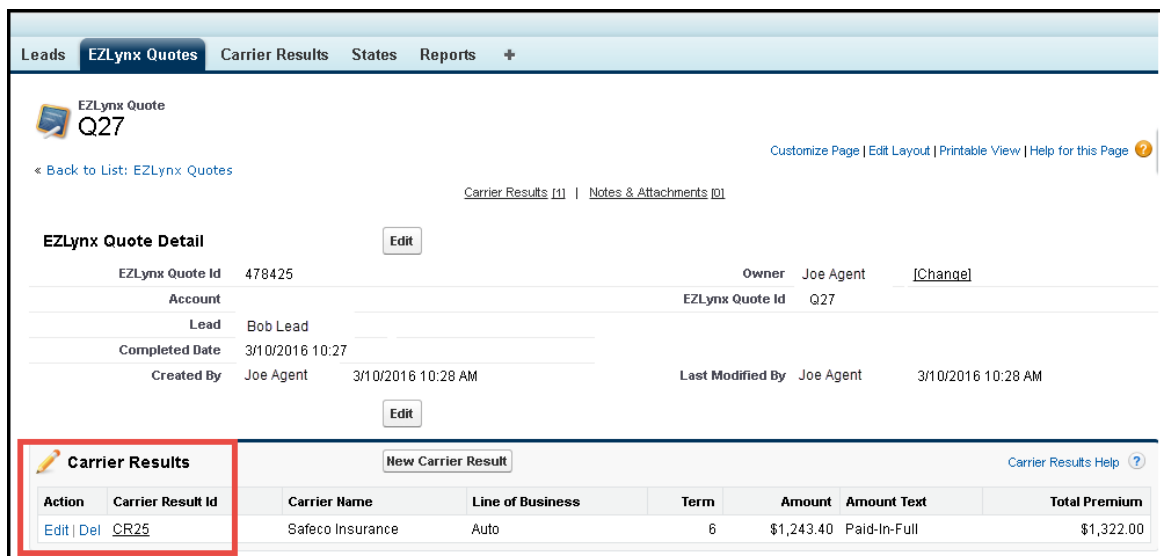
Contact Method:
 Contact Time:

3. Locating EZLynx Quote Data in Salesforce

1. To view EZLynx Quotes for one specific Salesforce Lead:
 - a. Locate the Lead account in Salesforce.
 - b. Scroll to bottom of Lead Account to [EZLynx Quotes](#) area.
 - c. To view additional quote details, click the EZLynx Quote ID.
2. OR, to view all recent [EZLynx Quotes](#) for all of your Salesforce Leads:
 - a. Click the [EZLynx Quotes](#) tab at top of your Salesforce account.

NOTE Within Salesforce, the EZLynx Quotes page view can be customized. We recommend setting the view to include applicant first and last name.

3. To view a quote’s Detail page, click the EZLynx Quote ID.
4. To view Carrier Result Details, click [Carrier Result ID](#) at the bottom of the [Quote Detail](#) page.



Leads **EZLynx Quotes** Carrier Results States Reports +

EZLynx Quote
Q27

Customize Page | Edit Layout | Printable View | Help for this Page

< Back to List: EZLynx Quotes

Carrier Results (1) | Notes & Attachments (0)

EZLynx Quote Detail

EZLynx Quote Id	478425	Owner	Joe Agent	[Change]
Account		EZLynx Quote Id	Q27	
Lead	Bob Lead			
Completed Date	3/10/2016 10:27			
Created By	Joe Agent	3/10/2016 10:28 AM	Last Modified By	Joe Agent 3/10/2016 10:28 AM

Carrier Results [Carrier Results Help](#)

Action	Carrier Result Id	Carrier Name	Line of Business	Term	Amount	Amount Text	Total Premium
Edit Del	CR25	Safeco Insurance	Auto	6	\$1,243.40	Paid-In-Full	\$1,322.00

Questions? Contact support@ezlynx.com