

When an agency is new to EZLynx Management System, an admin is responsible for creating the agency's Master Company List, and keeping it updated as your agency is appointed with new carriers or stops writing with existing carriers.

This list populates the master and writing company options that are available when adding or editing a manual policy (see screenshot).

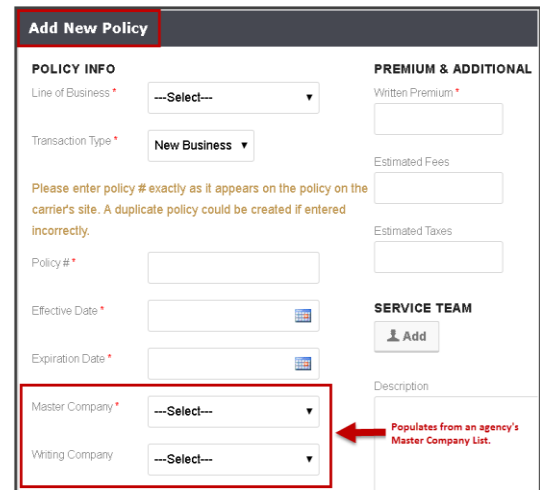
VIDEO: [Create the Master Company List](#) 3 min.

### Best Practice

Add all of your agency's carriers – downloading and non-downloading.

### Add a company:

1. Hover over the **Settings icon** and select **Manage Carriers/Markets**.
2. Click **Add New Master Company** at the upper right.
3. Type a **company name or NAIC code** in the box and click **Search**.
4. Select the **company from the search results**.
  - If the company isn't found in the search, **skip to step 4 for adding a custom company**.
5. **Select each of the writing companies, or NAIC codes that the carrier has provided you in their Download packet documentation, and click Save.**
6. **Repeat steps 2 - 5** to add all of your agency's carriers.

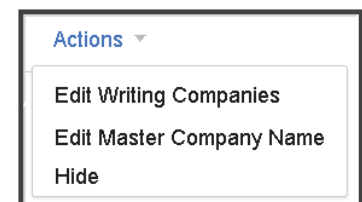


### Add a custom company (usually an MGA or brokerage):

1. Hover over the **Settings icon** and select **Manage Carriers/Markets**.
2. Click **Add New Master Company** at the upper right.
3. Type the **custom company name** in the box and click **Search** (step is required to add custom company).
4. At no master company found message, click the **Add a Custom Company** link.
5. Click the **Add Custom Company** button.
6. Enter a **writing company name or NAIC code** in the box and click **Search**.
7. **Select each of the writing companies, or NAIC codes that the carrier has provided you in their Download packet documentation.**
8. **Repeat steps 6 & 7** until all writing companies are added to the custom company, then click **Save**.

### Make changes to the list:

1. Locate the company on the list.
2. Go to **Actions** on the right.
3. Options include **Edit Writing Companies**, **Edit Master Company Name** (custom companies only) or **Hide** (delete) the company from the list.



Questions? Contact [support@ezlynx.com](mailto:support@ezlynx.com).