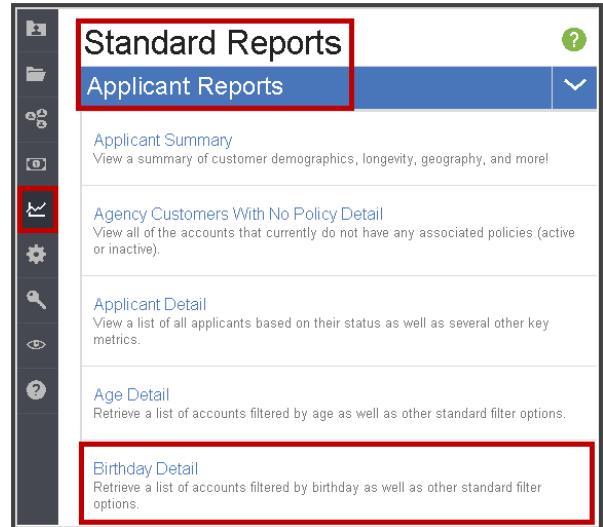


Would you like to send an email or mail a card to your prospects and customers on their special day? It's easy to run a report of upcoming birthdays for your current applicants and co-applicants.

**To run a birthday report:**

1. Hover over the **Reports** icon.  
Need report access? Contact [support@ezlynx.com](mailto:support@ezlynx.com).
2. From **Standard Reports**, click **Applicant**.
3. Select **Birthday Detail**.
4. On the left, **set filters** as desired.
5. Click **Update Report**.
6. Use the icons at the upper right to **download** the report to your computer or **save** the report in EZLynx.



**Recommended best practice:**

1. Follow steps 1 – 3 above.
2. **Set filters as follows:**  
**Date Type:** Sliding Date  
**Birth Month:** Next Month  
**Branch:** Any combination of offices.  
**Agent:** Any combination of agents.  
  - “Agent” refers to the one user assigned to an applicant (displayed on the upper left side of every applicant account).

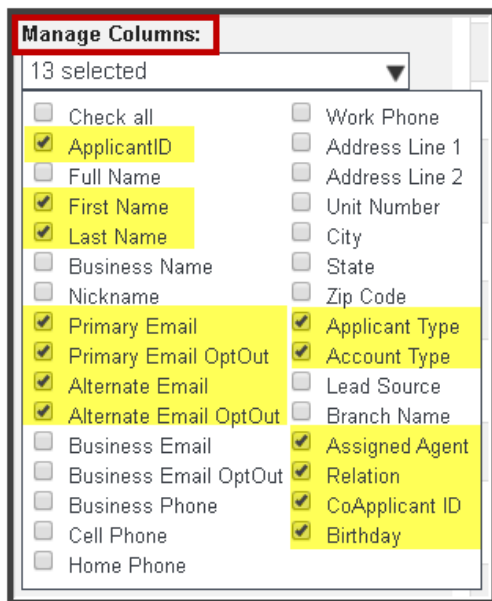
**Account Type:** Any combination of account types.

**Applicant Type:** Any combination of applicant types.

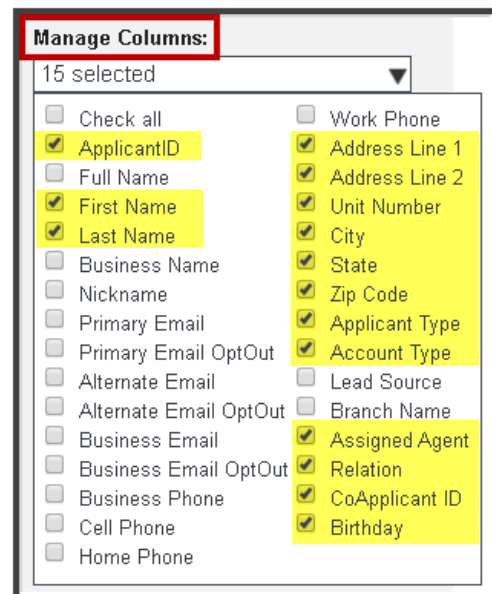
**Relation:** Insured and Co-Applicant

**Manage Columns:** Select **at least** the following:

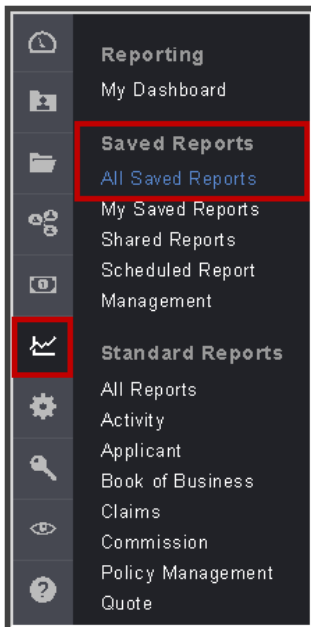
**Emails**



**Mail**



3. Click **Update Report** button.
4. Click **Disc icon** at upper right to **save report**.
5. At **Save As**, enter “**Next Month’s Birthdays**”.
6. Add a detailed **report description**; include which offices, applicant types, agents, etc. were added.
7. Share with “**Everyone in my agency with access to reports.**”
8. Click **Save**.
9. At a designated time **each month**, hover over the **Reports icon**, and from **Saved Reports**, select **All Saved Reports**.
10. Select “**Next Month’s Birthdays**”.
11. Use the report to **send birthday greetings at the appropriate times**.



### Save Report

Enter a name and description for your custom report, set your sharing preference, then click save.

Save As:

Description:

Who should see this report?  
 Only Me  
 Everyone in my agency with access to reports.

#### NOTE

The report has **sliding dates** so based on the date it’s opened, it always pulls the next month’s birthdays. For example, when opened anytime in January, the report pulls the current applicants and co-applicants with February birthdays. When opened anytime in February, it pulls March birthdays.

To keep a static copy of a report, use the “down-arrow” icon at the upper right to save the report to your computer.

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