

Your EZLynx account contains a lot of useful applicant and quote data that can be accessed using our Legacy Reports. These reports are tried and true; familiar to many EZLynx users because they have been available since we rolled out the Rater more than ten years ago. While we have a new look and navigation for most reports, the Legacy Reports have not changed. This guide provides tips for running Legacy Reports.

For more information about our other reports, use the links below:


- [Summary Reports](#) – provide key information at a glance.
- [Detail Reports](#) – provide a preset table of data that can be modified using various report criteria filters.
- [Master Reports](#) – offer additional tools, so that you can create customized reports for your agency.

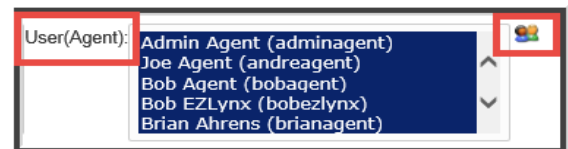
Reports Access:

To access Legacy Reports, click on the **Reports** icon , then use the blue bar to expand **Applicants** or **Quotes**.


- A user must have the proper permissions to access Reports. **If you need report Reports access**, have an admin contact support@ezlynx.com to authorize giving you this user permission.

Basics for All Reports:

- Go to each filter and make a selection.
- At **User (Agent)** field, click the colorful people icon to select which users to include in the report.
- Click **Retrieve** to run the report.
- All report **headers** are clickable for sorting purposes. Click again to sort in opposite direction.
- Most reports can be **exported to Excel** from the top of  page.



Quotes Reports:

- **Status** = successful or failed quotes.
- **Carriers** = select one, all carriers or multiple carriers (hold down CTRL key, click multiple carriers).
- **User** = most reports can be run for one specific user, multiple users or all users at an agency. Click the “people icon” on left of field to check boxes for the users you want included in the report data.
- **From and Thru** = cannot exceed 31 days.
- **Display Configuration fields** = you may need to click this  icon on the far left of the screen to see these fields which change the way the report results will be displayed. Try the various options to see which works best for your needs.

Consumer Quoting Activity: Returns CQ portal data. A great report to use for follow-up purposes.

- **From and Thru** = Up to one year (we recommend running only 6 months at a time)
- **Manage Leads** = select a CQ portal from dropdown for data to be included in results.

Birthday Report: Returns birthdays for applicants and co-applicants. [Read the Birthday Report Guide here.](#)

- **Configure View** = fields you may want to check are Email, Email Opt-out and Relation.

Questions? Contact support@ezlynx.com