

With Agency Form Templates, you can upload a custom merge document or editable PDF, then have the unique applicant, policy, agent, and agency data pre-fill each time the form template is used. Examples of Agency Form Templates include a fax cover sheets, customer invoices, and custom insurance applications – all of these can include your agency’s logo.

### Supported Documents:

- Microsoft Word Merge documents (preferred).
- Google Docs with [Smartsheet Merge](#).
- Editable PDFs - [create with PDFescape](#).

### Document Resources:

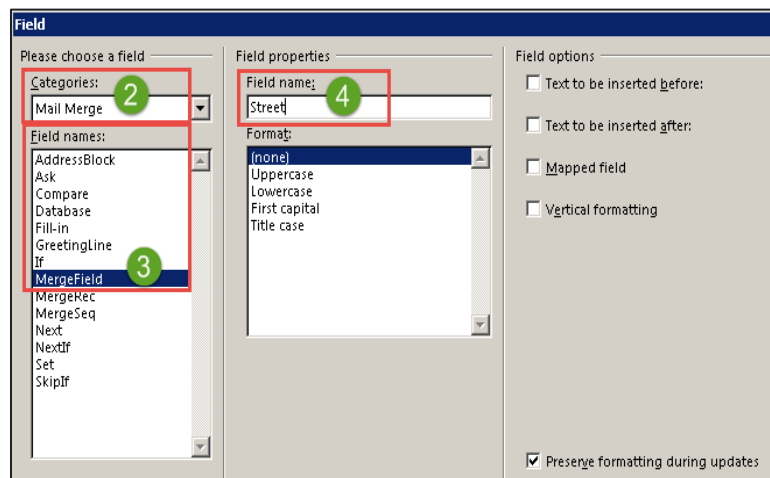
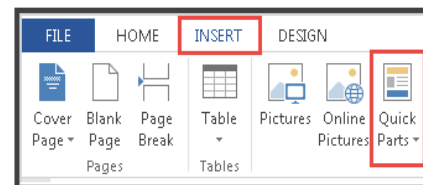
- Some agents purchase merge docs that are already customized for insurance agents.
- Open a blank Word or Google doc to start from scratch, and add merge fields.

In this guide, you’ll learn to create, upload and use a **Microsoft Word Merge doc for Agency Form Templates**.

VIDEO: [Agency Form Templates – Using Word Merge Docs](#) 4 ½ min.

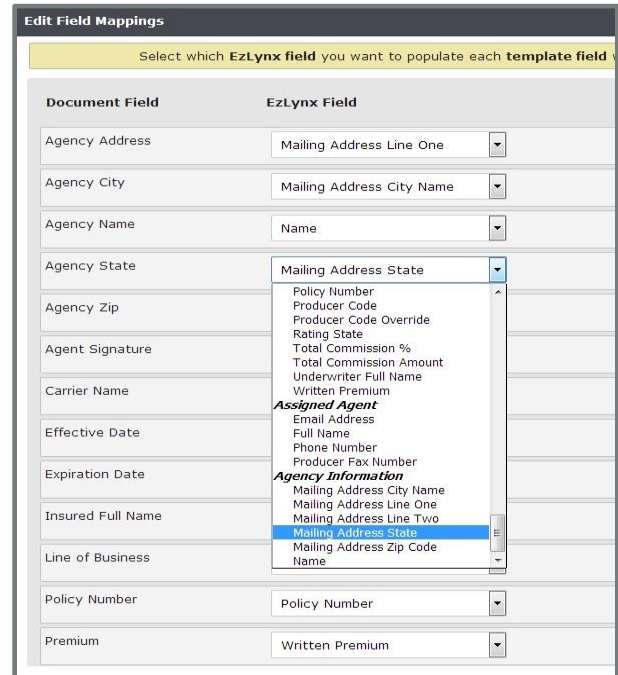
### Create a Word (2013) Merge Doc (tutorials for other versions available online)

1. At top of Word, click **Insert>Quick Parts**, and **Field**.
2. Set **Category** to **Mail Merge**.
3. Set **Field names** to **MergeField**.
4. Enter a **Field name**:
  - a. We recommend using an [EZLynx Mapping Field](#) name.
  - b. Or, enter any identifiable field name for mapping to the appropriate [EZLynx Mapping Field](#) later.
5. Click **OK**. The mapped field replaces the merge field in the uploaded document.
6. Repeat these steps to add all of the mapping fields.



## Uploading an Agency Form Template

1. Hover over the **Settings** icon, and select **Manage Form Templates**.
  - a. If you don't have this option, have an admin contact [support@ezlynx.com](mailto:support@ezlynx.com) to authorize giving you this permission.
2. Click **Add Form Template**.
3. At **Description**, create a document name.
4. Click **Choose File** - locate the doc on your computer.
5. Click **Save**.
6. The **Edit Field Mappings** box appears:
  - a. The uploaded document's merge fields are listed on the left, and the EZLynx fields that can be mapped are on the right.
  - b. At **EZLynx Field** dropdowns, select the EZLynx data to map to the **Document Fields**.
  - c. Click **Save**.



Document Field	EZLynx Field
Agency Address	Mailing Address Line One
Agency City	Mailing Address City Name
Agency Name	Name
Agency State	Mailing Address State
Agency Zip	
Agent Signature	
Carrier Name	
Effective Date	
Expiration Date	
Insured Full Name	
Line of Business	
Policy Number	Policy Number
Premium	Written Premium

## Using a Form Template on Applicant Account

1. From any applicant's **Documents** tab, click **Add** at upper right, and select **Form**.
2. At left, click the **Agency** tab.
3. Locate form, and check its box.
  - a. There is a search box to locate any form by number, name or type.
4. When applicable, use the **Policy** dropdown to associate the form with a specific policy.
5. Click **Add Document**.
6. Optionally:
  - a. Email the document from **Actions** on right.
  - b. Share document on Client Center by checking Share box (for Client Center users).

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