

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; see [Agency Form Templates – Using Word Merge Docs](#)).
- Google Docs with [Smartsheet Merge](#).
- Editable PDFs - [create with PDFescape](#).

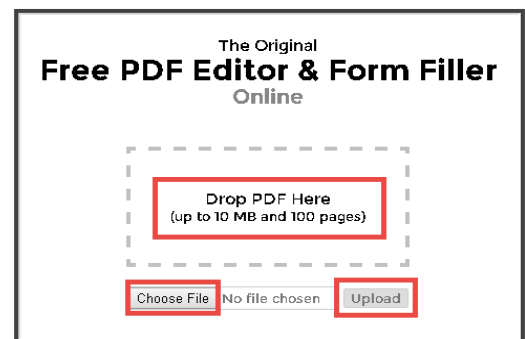
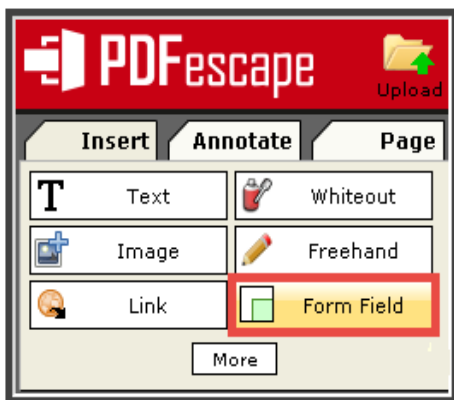
### Document Resources:

- 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 order for an agency form to pre-fill with EZLynx data, or to be editable when the information does not exist in EZLynx, it must be in an editable PDF format when uploaded to EZLynx. **In this guide, you’ll learn how to use PDFescape, a free online software, to create an editable PDF for Agency Form Templates.**

### Create an editable PDF in PDFescape

1. Locate the PDF document.
2. Go to [PDFescape website](#) - a free online software.
3. Choose File from your computer or drag and drop (see right). Click Upload.

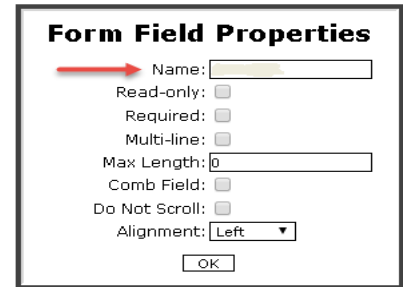


6. Click and hold mouse to draw a box in the PDF document – draw it where you want the pre-fill data to be added to the PDF – adjust the size of the box if necessary (see right).
7. Right-click inside the box, select **Object Properties**.

4. Click **Form Field** at upper left, to create the fields that will pre-fill from EZLynx applicant data. If the pre-fill data is not available in EZLynx, the field will be editable so you can enter the information manually.
5. In the **Form Field Creation Tool** box, leave set to **Text**, and click **Select**.

<b>DATE:</b>	<input type="text"/>
<b>TO:</b>	<input type="text"/>
<b>FROM:</b>	<input type="text"/>
<b>SUBJECT:</b>	<input type="text"/>

8. In the **Form Field Properties** box, go to **Name**.
9. Enter one of these [EZLynx Mapping Fields](#) as the Field Name. This is the data that EZLynx can pre-fill into custom agency forms.
10. Click **OK**.
11. Repeat steps 6-9 until all fields to be pre-filled with EZLynx data are added to the PDF.

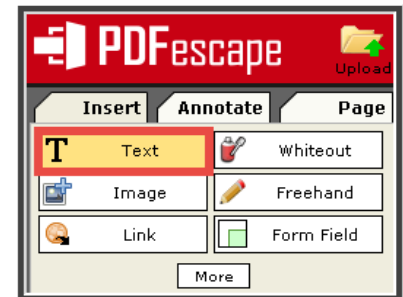


The **Form Field Properties** dialog box contains the following fields and options:

- Name:** A text input field with a red arrow pointing to it.
- Read-only:**
- Required:**
- Multi-line:**
- Max Length:** A text input field with the value '0'.
- Comb Field:**
- Do Not Scroll:**
- Alignment:** A dropdown menu set to 'Left'.
- OK** button at the bottom.

To include fields that EZLynx cannot pre-fill, editable fields can be added instead:

1. Click **Insert tab** at upper left, and select **Text**.
2. Click and hold mouse to draw a box where you want the editable field to be placed in the PDF- adjust the size of the box if necessary.
3. Once all fields have been added to the PDF, **Save** icon on left to save this editable PDF to your computer.



## Upload an Agency Form Template to EZLynx

1. This is an EZLynx Management System Admin function.
2. Hover over the **Settings** icon, select **Manage Form Templates**.
3. Click **Add Form Template** at upper right,
4. At **Description**, create a document name.
5. Click **Choose File** to locate the document on your computer, and **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. These will automatically map if the editable PDF was created with the [EZLynx Mapping Field names](#).
  - b. At any unmapped **EZLynx Field** dropdowns, select the EZLynx data to map to the **Document Fields**.
  - c. Click **Save**.
7. The form is now available for any user to access on any applicant's Documents tab.

## Using a Form Template from an Applicant Account

1. From any applicant's **Documents** tab, click **Add** button at upper right, select **Form**.
2. At left, click **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 select a policy. The form will pre-fill with the policy data.
5. Click **Add document**.
6. Optionally:
  - a. Email the document from **Actions** on right.
  - b. Share document in customer's Client Center account by checking the **Share** box (Client Center users only).

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