



During the first week in July, we're rolling out EZLynx 4.16.06 which includes an enhanced Reports UI with turbo charged features. Also, there is a BETA roll out of several Commercial Management System features: Commercial Package Policy support, Commercial Applications and Proposals.

Highlights

Reports 2.0

- Simpler navigation & more sophisticated filters
- Ability to customize any Detail or Master report; save for future use
- Activity Summary Report
- Quotes Summary Report

BETA Release

- Commercial Package Policy Support (Manual entry only)
- Commercial Applications
- Commercial Proposals

Interested in BETA testing? Contact support@ezlynx.com

Reports 2.0

EZLynx Reports 2.0 have a new user interface and extensive filtering capabilities.

The report types:

Detail Reports - a preset table of data that can be modified using various report criteria filters.

Summary Reports - key information at a glance, and tools for getting the most from their data.

Master Reports - include more tools for creating custom reports; detailed filters, aggregates, grouping, sorting, paging, and chart creation.

Legacy Reports: the classic reports we've always offered; to be updated to the new UI soon.

Inspired to learn more? View the reports guides here.

- [Detail Reports Guide](#)
- [Summary Reports Guide](#)
- [Master Reports Guide](#)

Want to see the new reports in action? [Register for a free webinar here](#)



What's New in EZLynx 4.16.06

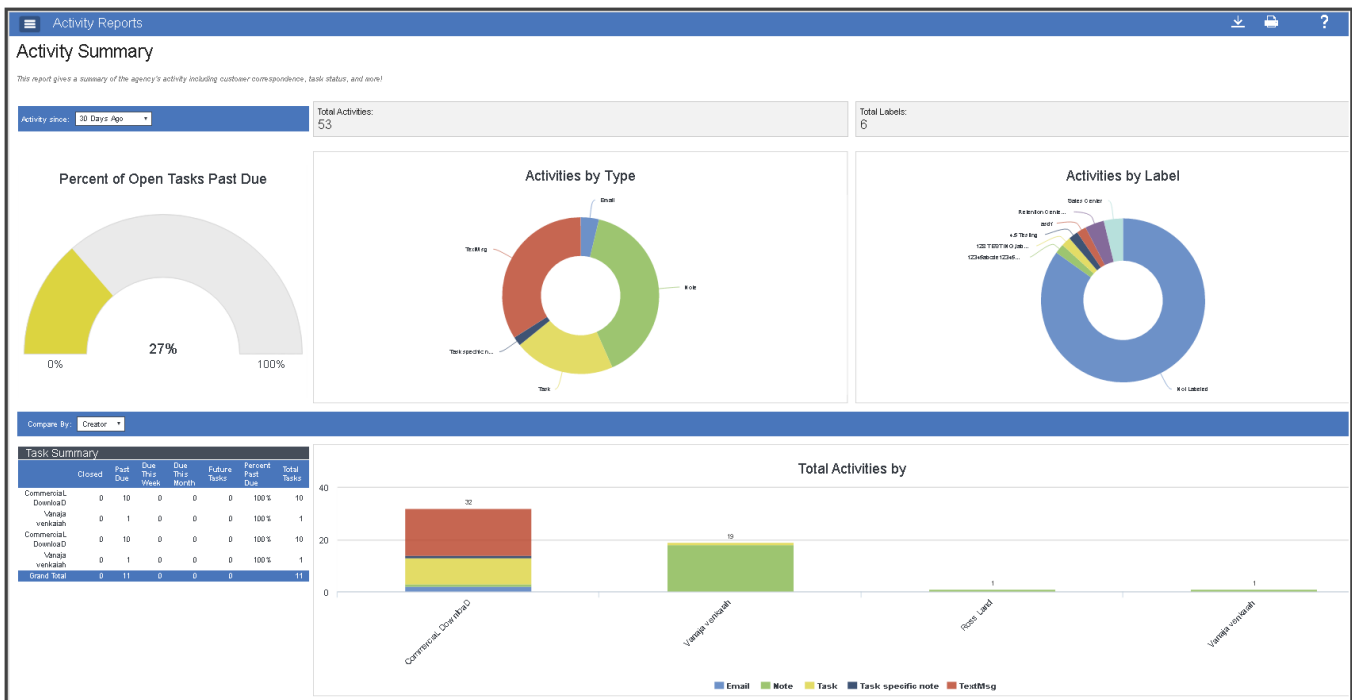
July 2016 Release

Customized Detail and Master Reports can be saved for future use. When saved reports including sliding date range filters, the report data will likely change each time the report is run.

Saved Reports

Activity Reports	>
Applicant Reports	>
Book Of Business Reports	>
Commission Reports	>
Policy Management Reports	>
Quote Reports	>

Activity Summary Report



Quote Summary Report

Quote Summary

View this report for summary information on quotes by Agent, Carrier, Line of Business, etc.

Quoted since: Compare by:

Customers will be counted more than once if they are assigned to multiple Lines of Business.

Quote Summary

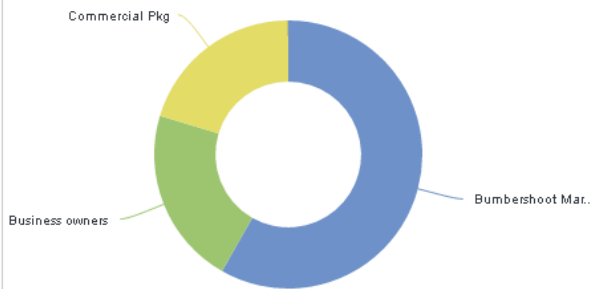
Line of Business	Number of Customers	Total Submissions	Total Success	Total Failure	Total Aborted	Total Manual	Average Premium
Auto (Personal)	16	16	0	16	0	0	
Bumbershoot Marine Liability	1	0	0	0	0	1	\$12,345.00
Business owners	1	0	0	0	0	1	\$4,545.00
Commercial Pkg	4	0	0	0	0	4	\$4,311.25
Grand Total	22	16	0	16	0	6	5.3k

Average Premium:
\$1,551.59

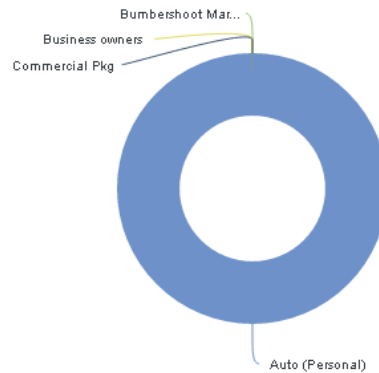
Total Customers:
22

Total Submissions:
16

Average Premium by Line of Business



Quote Submissions by Line of Business



Commercial Package Policy Support (BETA Release)

Manual entry only

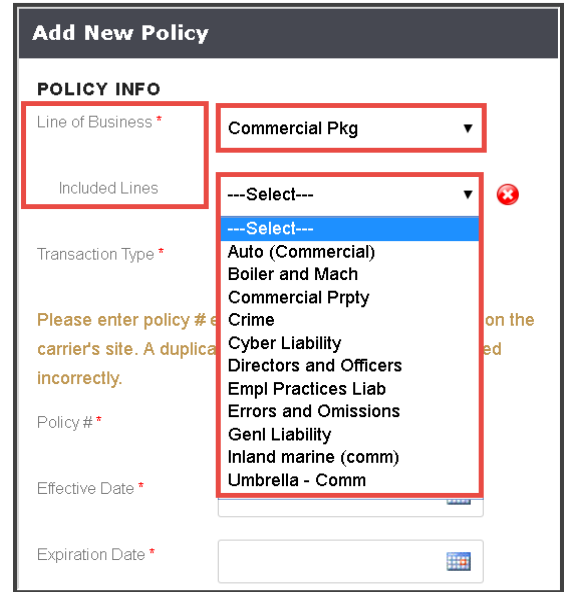
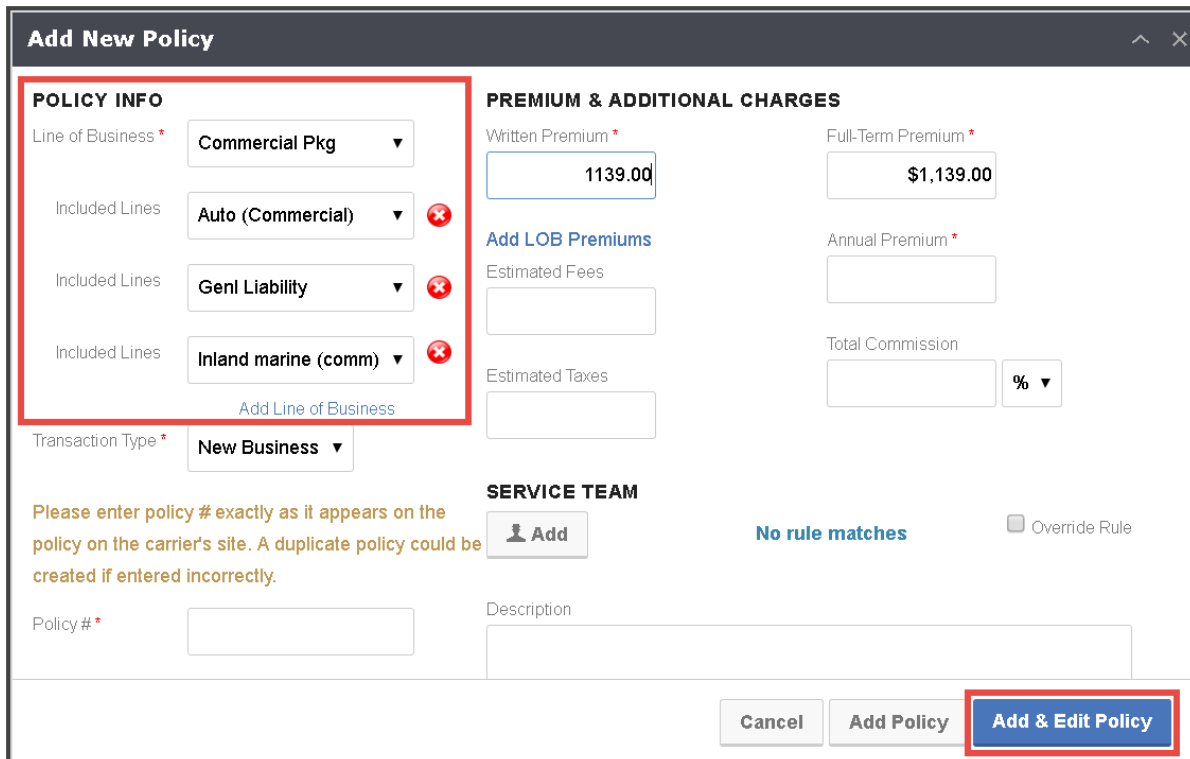
Maintain more accurate policy information and improve reporting capabilities by truly grouping lines of business within a one single package policy.

Let's take a look at the details

When adding a manual personal or commercial package policy in EZLynx, the user can now add the individual policies included in the package.

After selecting either personal or commercial package as the main Line of Business, add any number of individual LOBs and their premiums as you'd like.

The Add & Edit Policy feature prompts the user through a series of tabs for adding detailed policy information; to reduce data entry keying, some tabs gather information that can be shared across multiple policies.



What's New in EZLynx 4.16.06

July 2016 Release

Tabs to collect information shared between all policies in the package; for less data entry.

Policy Number: AB-99999 - Active
Line of Business: Commercial Pkg | Term: 6/23/2016 - 6/23/2017 | Carrier: Safeco Insurance | Full Term Premium: \$340.00 | Source: Manual

Save & Close Cancel < Previous Next >

Insured Information Auto (Commercial) Genl Liability Umbrella - Comm Underwriting Additional Interest

BUSINESS INFORMATION

Nature of Business	<Select One>	% of Installation, Service, or Repair work	
Date Business Started	mm/dd/yyyy	% of Off Premises Installation, Service, or Repair Work	
Description of Primary Operations		Description of Operations of Other Named Insureds	

Commercial Applications (BETA Release)

The ability to add commercial applications in EZLynx is a huge, time-saving tool for agencies that write commercial business. Complete the application once in EZLynx, then easily create necessary ACORD form for submission to multiple carriers.

Take an application and quickly transform it into a policy or take a policy and create an application from the data.

Starline Limos

Overview Policies Details Quotes Lead Info Contacts Documents Requests Activity Invoices Invoices

APPLICATION(S) Add Commercial Application

LOB	Last Modified	Description	Actions	Forms
Business owners	6/20/2016	Add any description here	Actions	View
Umbrella - Comm	6/20/2016	Add any description here	Actions	View

POLICIES Show Inactive and Unknown Add Policy Edit Columns

Status	Carrier	Premium	Policy #	Producer Code	LOB	Effective	Expiration	Actions	Forms	Details
Active	A Central Insurance Company	\$6,000.00	Polycnumber	--	Genl Liability	6/20/2016	6/20/2017	Actions	Forms	Details

Commercial Proposals (BETA Release)

From a Commercial applicant's Documents tab, click the Add button and select Quote Proposal. Ability to select one manual policy from each LOB, then click Add Quote Proposal. The feature will be expanded to include downloaded policies in the near future.

Supported LOBs:

- Commercial Auto
- General Liability
- Commercial Property
- ...more coming soon

Created By	Date Created	Date Modified	Share
Commercial	6/21/2016	6/21/2016	<input type="checkbox"/>
Download			

Auto (Commercial)

Source	Description	Expiration/Last Modified	Status
<input type="radio"/> Policy # Auto-123		6/14/2017	Active
<input checked="" type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive
<input type="radio"/> Policy # 12345		3/1/2016	Inactive
<input type="radio"/> Policy # nwl-123		6/9/2016	Inactive

Genl Liability

Source	Description	Expiration/Last Modified	Status
<input type="radio"/> Policy # Gen-123		5/10/2017	Active
<input checked="" type="radio"/> Policy # 1243		6/7/2017	Active
<input type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive

Commercial Prpty

Source	Description	Expiration/Last Modified	Status
<input checked="" type="radio"/> Policy # Comm-123		5/9/2017	Active
<input type="radio"/> Policy # ACP7152461475		11/28/2012	Inactive

[Create Quote Proposal](#)