

The Personal URL feature allows a prospect to complete a new EZLynx application, or a customer to update their existing application information at renewal time. The information is saved to the agent's EZLynx account for quick and easy quoting. This is convenient for the customer, and frees the agent's time to sell more business.

Personal URLs work in conjunction with the agency's EZLynx Consumer Quoting portal. If the agency does not have a CQ portal, a default Consumer Quoting portal is used. The type of portal used determines the look of the application pages. When using an agency's CQ portal, the agency's custom logos and branding are seen, while using a default portal displays the agency name, agent name and contact information with generic branding.

### Personal URL benefits:

- Prospect completes a new EZLynx rating application themselves and information updates in EZLynx.
- Existing customer updates their own EZLynx application before the agent re-quotes at renewal time.
- Agencies with a CQLive portal can enable live quoting. Live quoting provides prospect/customer with a quote immediately after submitting the application from the Personal URL. Otherwise, the prospect/customer receives a message that "an agent will be in touch shortly".

### To gather a prospect's quoting information:

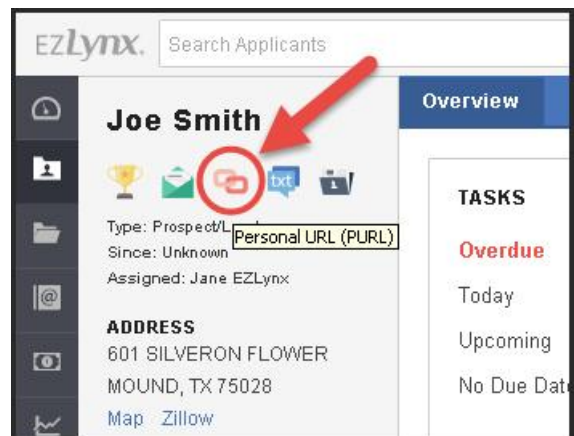
- Hover over the Applicants icon.
- Select *Create New Applicant*.
- Enter the prospect's name, state, zip code and email address – these are the only required fields for sending a Personal URL.
- Click *Create New Applicant*.
- Send a Personal URL from the applicant's side pane; the prospect can complete the application themselves.
- The application is automatically updated in EZLynx, and the user receives a notification.

### To allow a customer to update their application prior to re-quoting:

- Locate the existing customer using the Search box in the upper left of all EZLynx screens.
- Send a Personal URL from the applicant's side pane to allow the customer to update their own EZLynx rating application.
- The applicant account is automatically updated in EZLynx for the user, and user receives a notification.

### To send a Personal URL:

- Click the Double Link icon below the applicant's name.

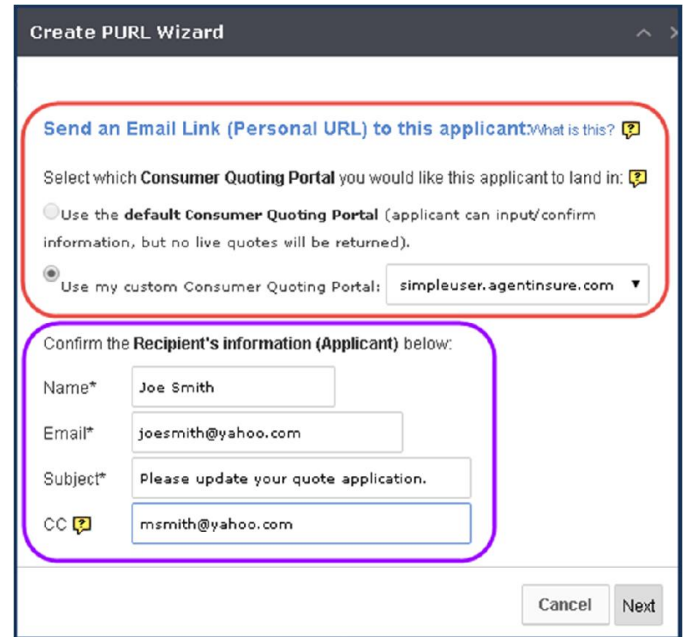
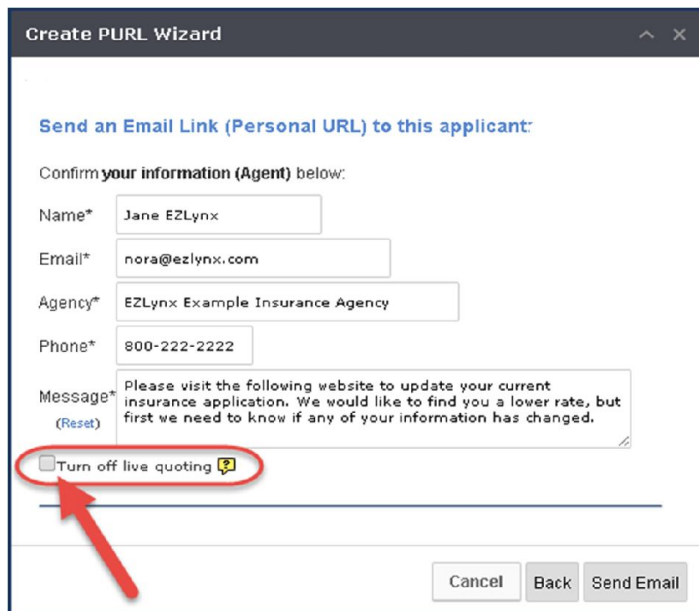


## Select a portal:

- If the agency does not have a CQ portal, a default portal is used. A default portal doesn't support live quoting.
- If the agency has their own CQ portal, it is automatically used. Or, if the agency has more than one CQ portal, select a portal from the dropdown.

## Recipient Information:

- The applicant's name/email address are pre-filled.
- Add an email *Subject*.
- Add email addresses to copy. Separate multiple emails with semi-colons (;).
- Click *Next*.

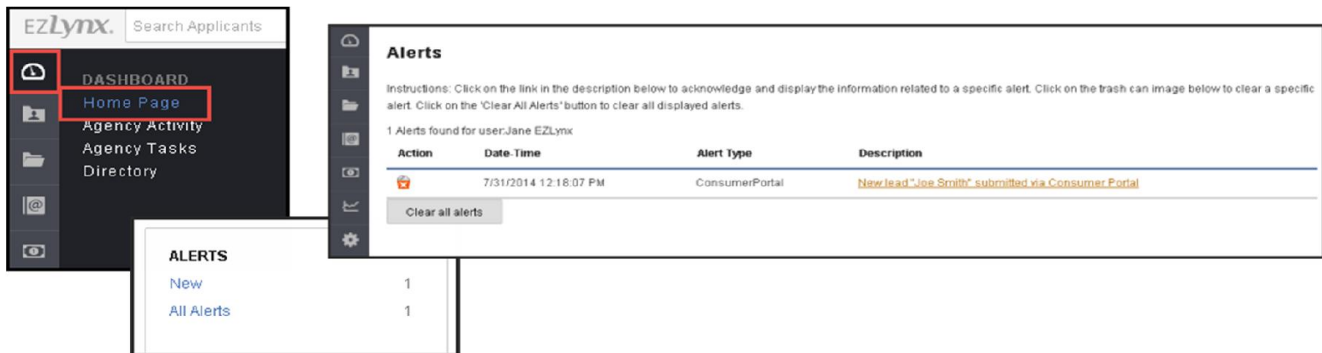
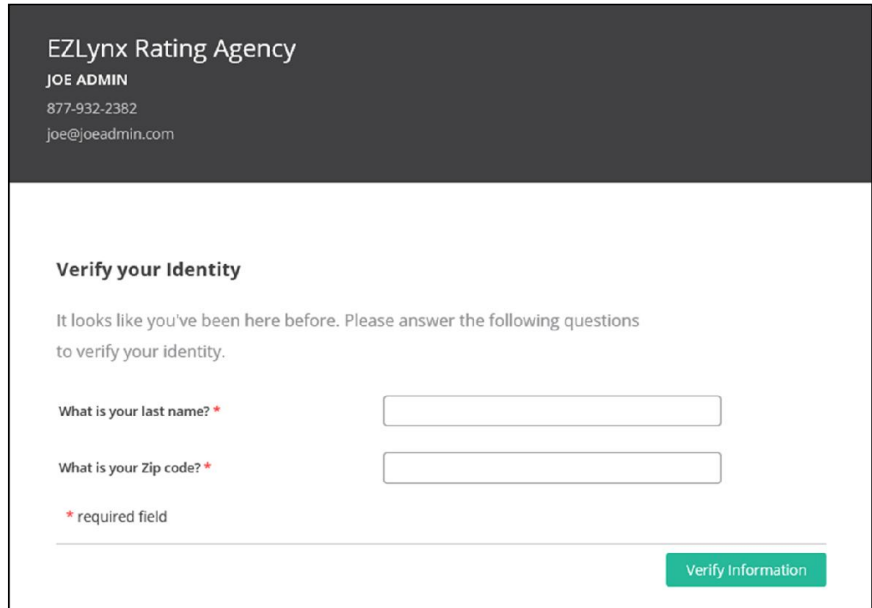



## Agent information:

- The agent's contact information is pre-filled. Note: Any changes to the information in these fields is saved for use on all future PURLs until another change is made.
- Enter an email *Message*.
- If the agency has a CQLive portal, decide whether to *Turn off live quoting*. When the box is unchecked, the applicant receives a live quote immediately after submitting the application.
- Click *Send Email*.

**Prospect/customer receives email:**

- The email has a link to the agency’s custom CQ portal or a default portal page (shown at right) to verify their last name and zip code.
- Prospect/customer completes/updates the application.



**A system Activity is logged on the applicant’s Activity tab every time a Personal URL is:**

- sent
- link is clicked
- application is submitted

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