



EZLYNX POLICY MANAGEMENT

Client Management • Personal & Commercial Lines Policy Management

Policy Download Reports • Direct Bill Commission Reports • ACORD® Form Support

It's time to throw out that expensive agency management system. With EZLynx Policy Management, you will be able to manage clients, run reports on policy downloads



and direct bill commissions for cross selling and marketing, and manage your personal and commercial lines - All from within EZLynx, and at a fraction of the cost.

EZLynx Policy Downloads are carrier policies or forms that are downloaded from your Ivan's mailbox directly into EZLynx.

HAVE ANY QUESTIONS or NEED MORE INFORMATION?

Email us at sales@webcetera.com or call **877.932.2382** and ask us.

Working with EZLynx Policy Management

You can view the customer's policy download data from the EZLynx Applicant Overview tab. See policy download details, view and print state specific ACORD® forms, compare any two transactions within a policy for relevant changes, and sync EZLynx applicant quote details with the policy download to be sure you are quoting the most current data.

EZLynx Policy Management: Action Items Dashboard

Carrier Notifications
Notifications have been retrieved. [View Report](#)

My Action Items

Policy Downloads (3 total)
For Last 7 Days:
(2 unmatched) (1 matched)
[New Policies \(0\) \(0\)](#)
[Cancellations \(0\) \(0\)](#)
[Claims \(0\) \(0\)](#)
[Renewals \(1\) \(1\)](#)
[Non-Renewals \(0\) \(0\)](#)

Alerts (8 total)
New (7)

Reminders (0 total)

Installed Products
EzLogin (1.0.0.0)

News
CARRIER DOWNLOADS ARE NOW AVAILABLE
We can now download and import your policy transactions from participating insurance carriers!
New business, renewals, endorsements, reinstatements and more are all added to EZLynx. The information in EZLynx will be current and match the policy data with each download carrier.
Online, available from any workstation with web connection, you can access your book of business instantly within EZLynx. New files, new-business acquisition and cross-selling to existing policies are in place.
EZLynx with Policy Download is your gateway to complete a policy. For more info, email us at policydownload@webcetera.com or give us a call at 877-932-2382.
[Click here get more information](#)

Carrier - Recent News! [See All EZLynx Carriers](#)

2/28/2011	VA Hanover Connections	Hanover Ho
2/26/2011	GA General Casualty Insurance Companies	General Cas
2/18/2011	AZ Foremost Insurance Group	Foremost Au
2/18/2011	SD EMC Insurance Company	EMC Auto ar
2/18/2011	ND EMC Insurance Company	EMC Auto ar
2/14/2011	MD Maryland Automobile Insurance Fund	MAIF Auto no
2/14/2011	NV Badger Mutual Insurance Company	Badger Mutu

Action Items Dashboard shows recent downloads, new policies, and cancellations. Click hyperlinks to view download types as well as matched and unmatched records under Policy Admin.

sales@webcetera.com • 877-932-2382



www.ezlynx.com • www.webcetera.com

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EZLynx Policy Management: Policy Change Summary

Compare any two download transactions within a policy to quickly determine relevant changes.

Policy Change Summary - 10/28/2011 4:56:25 PM

Insured Info Print

Named Insured(s):
 COLE, JAMES
 2825 SHORLEY AVE
 EUCLID, OH 44132

*To see the change summary between two policy versions, select each version you would like to compare then click the 'Compare' button.

Version 1: 10/25/2011 - RWL - \$475.00 Version 2: AUTOP - Policy Number: #37643976 (Latest)

AUTOP - Policy Number: #37643976 (Latest)	AUTOP - Policy Number: #37643976 (Latest)
10/25/2011 - RWL - \$475.00	10/25/2011 - RWL - \$475.00
04/22/2011 - RWL - \$454.00	04/22/2011 - RWL - \$454.00
HOME - Policy Number: #37643976 (Latest)	HOME - Policy Number: #37643976 (Latest)
10/27/2011 - RWL - \$417.00	10/27/2011 - RWL - \$417.00

*To see the change summary between two policy versions, select each version you would like to compare then click the 'Compare' button.

Version 1: 04/22/2011 - RWL - \$454.00 Version 2: AUTOP - Policy Number: 45PH181976 (Latest)

	Version 1	Version 2
	04/22/2011 - RWL - \$454.00	AUTOP - Policy Number: #37643976 (Latest)
Policy Information		
Policy Number	#37643976	#37643976
Line of Business	Personal Auto	Personal Auto
Carrier Name	THE HARTFORD	THE HARTFORD
Personal Policy		
Policy Details		
Effective Date	2011-06-10	2011-12-10
Expiration Date	2011-12-10	2012-06-10
Net Change Amount	454.00	475.00
Full Term Amount	454.00	475.00
Current Term Amount	454.00	475.00
Coverages		
1998 FORD ESCORT SE/SPORT Vehicle Coverage		
PD Coverage Full Term Premium	72.00	71.00
BI Coverage Full Term Premium	196.00	218.00
Policy Summary		
Summary		
Full Term Amount	454.00	475.00
Net Change Amount	454.00	475.00

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Activities (+ Add) Reminders (Schedule) Show System Activities

Date	User	Status	Activity	Description
8/3/2010 4:56 PM	Agent, Joe	✓	Policy Download	Applicant created from carrier download for policy (OZYY6480807234)
8/3/2010 4:56 PM	Agent, Joe	✓	Policy Download	Home data updated from carrier download for policy (OZYY6480807234)

Activities grid shows when the applicant and quote data was uploaded into EZLynx from the carrier.

Policies (+ Add)

Status	Actions	LOB	Carrier	Dwnld Date	Eff D
✓	Delete Move	Umbrella - Comm	Insurance Company	04/27/2011	04/01
⊖ ✓	Compare Sync Move	Homeowners	Insurance Company	08/03/2010	08/01

Date/Time	Trans Type	Premium	Effective Date	Full Details	Activity Source
06/13/2010	Policy Change	\$572.00	08/01/2010	View	Download
06/09/2010	Policy Change	\$516.00	08/01/2010	View	Download
05/31/2010	Rnwl Img	\$585.00	08/01/2010	View	Download

Expand the Policy Download record to see the download details.

Home My Dashboard Applicants Commercial Completed Quotes Policy Admin Import My Settings

Policies Commissions Reports

Policy Download Report

Date Type: Effective Date Date Range: Select Date Range Search

Start Date: 1/1/2011 End Date: 9/1/2011

Which Name: As On Policy Name:

Show Advanced search options and columns

Total # of downloads: 73

Actions	Carrier	Insured	Policy#	LOB	Net Chg	Dwnld Date	Trans Date
	Ins. Carrier	YACOMMON, ZANXIA	1ZY00103001234	Auto (Personal)	\$304.00	08/03/2010	01/14/2010

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Commissions & Reports

Home My Dashboard Applicants Completed Quotes **Policy Admin** Import Messages My Settings Reports Admin MGA Admin

Policies **Commissions** Reports

Policy Commission Report Date Type: Transaction Date Date Range: Select Date Range Search

Start Date: 1/1/2011 End Date: 03/01/2011

Show Advanced search options and columns

Total # of commissions: 191

Carrier	Company Code	Insured	Policy#	LOB	Trans Type	Dwnld Date	Policy Eff Date
INSURANCE COMPANY	11070	ORBERT WANDA S	7062144	Auto (Personal)	Rnwl Img	5/5/2010	5/5/2010
INSURANCE COMPANY	11070	NELLY FRANK	7408923	Auto (Personal)	Policy Change	4/29/2010	1/2/2010
INSURANCE COMPANY	24732	UNNETT NORMA	7490426	Auto (Personal)	Policy Change	5/28/2010	5/28/2010
INSURANCE COMPANY	39012	UNNETT SUSIE J	728331	Auto (Personal)	Rnwl Img	5/4/2010	5/4/2010
INSURANCE COMPANY	24732	UNNETT SUSIE J	728331	Auto (Personal)	Cancel Rep	5/6/2010	5/6/2010

- View and export the direct bill commissions for your agents to Excel, Word, or PDF.
- Advanced search options allow for customizing the report.

Policies Commissions **Reports**

Select your report

Agency Mgmt Cross Sell List Get Report

Filters

Start Date: 1/1/2011 End Date: 9/6/2011

Has LOB: Auto (Personal) Homeowners Pers Umb (exs indemnity)

Does not have LOB: Auto (Personal) Homeowners Pers Umb (exs indemnity)

Carriers: Select All Carriers

Include: Only me Everyone in my agency Everyone in my agency and all subs Specific User

Agency Cross Sell List

Customer Name	Home Phone	Customer Address	Policy Number	LOB
BURGA, CHRISTINE	602999	3015 E WINDROSE DR, PHOENIX, AZ 85032	muy123	AUTOP
LUETT, PAUL	970992	8405 SHERIDAN WALLER, HOUSTON, TX 77078	1234567890	AUTOP
DESS, MICHEL	409404	P O BOX 372, MCLEOD, TX 75565	123456-b	AUTOP

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Coming Soon: Updated EZLynx Support

We have been working hard to make it easier for you to get the product support you need, when you need it.

The new support page in EZLynx will give you access to tips, video tutorials, and frequently asked questions. You can leave comments and rate articles, as well as search for specific keywords to find the article you're looking for.

The screenshot shows the EZLynx Support page interface. At the top, there is a navigation menu with links: Home, My Dashboard, Applicants, Commercial, Completed Quotes, Import, My Settings, Reports, Admin, Support, and a search field for 'Last Name / Email / App#'. Below this is a secondary navigation menu with buttons for: Support Home, Contact Us, Frequently Asked Questions, NewsLynx, Release Notes, Tutorials, Webinars, and What's New. The main content area features a 'Support Search' box, a 'Technology Support' section with a link to 'Check your browser settings here', and a poll titled 'Would you be interested in rating dwelling fire?' with radio button options: 'Yes, at a reasonable price', 'Yes, but only if it's free', 'Maybe', and 'No', and a 'Vote' button. The article list includes 'How to attach documents or portals', 'What is a PURL?', and 'World Series Fever!'. Three green callout boxes with arrows point to specific features: 'Find popular sections in the top navigation menu' points to the 'NewsLynx' button; 'Expand a recent article that you are interested in by clicking on the title.' points to the article title 'What is a PURL?'; and 'Respond to poll questions to help us make EZLynx even better.' points to the poll options.

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RECENTLY ADDED CARRIERS

New Carriers Released to EZLynx

Cincinnati Home - NC

EMC Auto - NE

GMAC Auto - IN

GMAC Auto - ID

GuideOne Home - OR

Olympus Home - FL

Secura Auto - MO

Secura Home - MO

Sublimity Auto - UT

Sublimity Home - UT

New Carriers Enabled for CPLive

GMAC Auto - AZ, IL

GMAC Auto - IN, TX

GMAC Auto - FL

MetLife Auto - MO, IN

MetLife Auto - GA, OH

MetLife Auto - KY, UT

MetLife Auto - AL, ID

Peninsula Auto - DE, MD

Peninsula Home - MD

Southern Mutual Home - GA

Southern Mutual Home - DE

Southern Mutual Auto - DE, GA, NC

Southern Mutual Auto - IN, VA

Southern Mutual Home - IN, VA

Southern Mutual Auto - AL, MD

Southern Mutual Home - AL, MD

If you would like any of the above carriers added to your EZLynx account, you can email us at support@webcetera.com.

You can also access our carrier library to view a current list of all available carriers in our state. Just log into EZLynx and click "Carrier Library By State" in the right column under "Help".

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