

EZLynx Quote Templates Guide



Work Smarter, Not Harder!

Do you often answer application questions with the same answers? Why waste time entering repetitive application information when you can quickly create a Quote Template that will pre-fill application fields for you?

Quote Templates, a time-saving feature included with every EZLynx account, allows you to default common application answers, like coverage amounts, into a template. Once created, the auto, home or applicant templates can be used any time you create a new applicant.

EZLynx Search Applicants

CREATE NEW APPLICANT

Applicant Information

First Name *

Last Name *

Rating State *

Lead Source

VIP No Yes

Customer Since

Use Quote Template
Optionally, select an existing quote template to use while creating this applicant.

Quote Template:

Create New Applicant

<Do Not Use a Template>


- <Do Not Use a Template>
- 100/300 500 ded
- 100/300 lia/um 500ded r/t
- 100/300-\$500 ded r/t
- 250/500 250ded
- 250/500 250ded r/t
- 250/500 500ded
- 250/500 lia/um 250 deds
- 300 lia 1% deds
- 500 comp/collision
- 500k 1% w/end
- Auto 100/300/100
- Auto Template

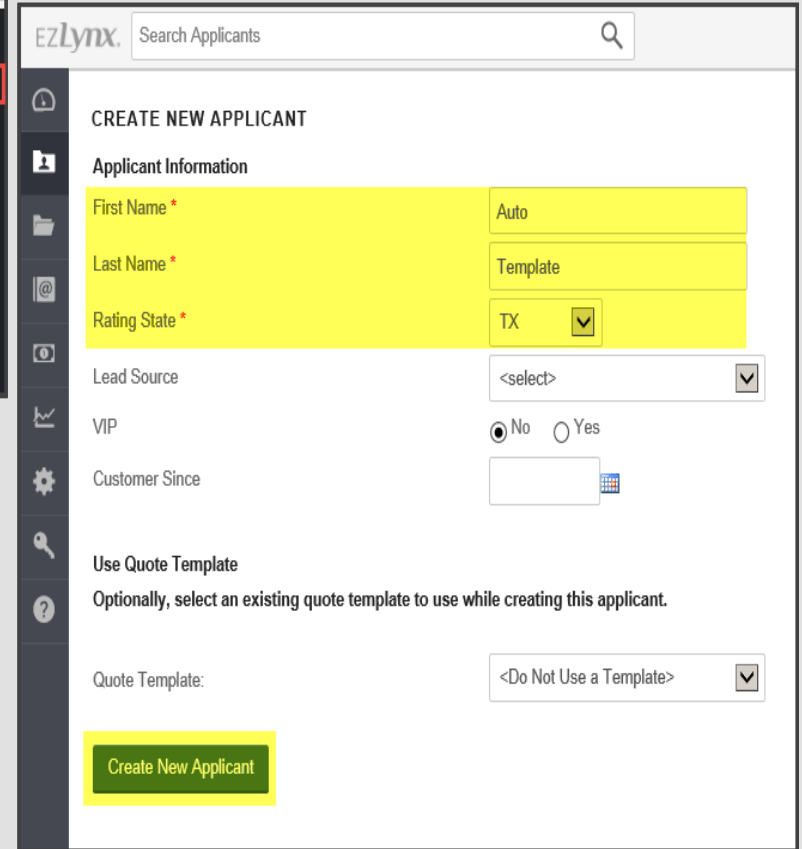
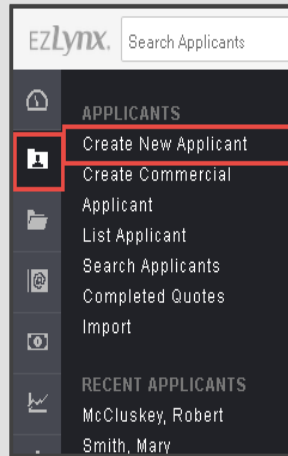


EZLynx Quote Templates

STEP 1:

Create a “Template Applicant”

- Hover over Applicants icon 
- Click “Create New Applicant”
- Enter “Auto Template” or similar for the applicant first and last name
- Set the rating state
- Skip the “Quote Template” dropdown for now – we’ll use this field later
- Click “Create New Applicant”



The screenshot shows the EZLynx 'CREATE NEW APPLICANT' form. The form fields are highlighted in yellow. The fields include: 'First Name *' (Auto), 'Last Name *' (Template), 'Rating State *' (TX), 'Lead Source' (<select>), 'VIP' (No/Yes), 'Customer Since' (calendar icon), 'Use Quote Template' (Optionally, select an existing quote template to use while creating this applicant.), and 'Quote Template:' (<Do Not Use a Template>). A 'Create New Applicant' button is highlighted in green at the bottom.

STEP 1 continued:

- At the bottom of the Details tab, choose “Save & Go to Auto” or “Home”, for the type of template you want to create.
- Click “Continue” in the pop-up box.
- Go through all the fields on each application page – every answer you set will auto-fill into new applications when you use the template.
- The template will be used with multiple applicants, so only enter basic quoting information that can be applied to different applicants, such as coverage information, credit check authorization, package discounts, etc...

Auto Template

Overview Details Quotes Lead Info Contacts Documents Activity Invoices

Type: Unknown
Since: Unknown
Assigned: Nora Kierig

ADDRESS
. TX
Map Zillow

PHONE NUMBERS
Home:
Work:
Mobile:

EMAIL ADDRESSES
None

Applicant Details

Prefix: <select> Gender: <select> Education: <select>
 First Name: Auto DOB: [calendar] Industry: <select>
 Middle Name: [] Marital Status: <select> Occupation: <select> years
 Last Name: Template SSN: [] Prior Employer: [] years
 Suffix: <select> Applicant Type: <select> Customer Since: []
 Maiden Name: [] Nickname: []

Contact Info

Address Line #1: [] Unit: []
 Address Line #2: []
 City: [] TX [] []
 County: <select> Zip: []
 Time @ Address: <select> years 0 [] months
 Email: []
 Alternate Email: []

Co-Applicant Information (select to specify Co-Applicant)

Save Save & Go to Auto Save & Go to Home Save & Go to Dwelling File Delete Print Details Export

Auto Template

Overview Details Quotes Lead Info Contacts Documents Activity Invoices

Auto Application: INCOMPLETE

Rating Policy Info Driver Info Vehicles Vehicle Use Incidents Coverage Assignments Carriers Finish

Type: Unknown
Since: Unknown
Assigned: Nora Kierig

ADDRESS
. TX
Map Zillow

PHONE NUMBERS
Home:
Work:
Mobile:

EMAIL ADDRESSES
None

PRIOR POLICY INFORMATION

Prior Carrier: <select> Exp. Date: [calendar] Years w/ Prior Carrier: <select> <select> Months
 Prior Liability Limits: <select> ← Prior Policy Term: 6 Month ← Years w/ Continuous Coverage: <select> <select> Months
 Prior Policy Premium: []

NEW POLICY INFORMATION

Credit Check Authorized: Yes ✓ New Policy Term: 6 Month ← Package: Yes ✓
 Effective Date (New Policy): [calendar]

Set the answer you use most often, so the fields will auto-fill these answers when you create a new applicant.

STEP 2:

Create the Template

When finished setting answers to the fields in the application:

- Click Overview tab
- Click "Create Quote Template" from ACTIONS box.
- Name the template
- If you'd like, share the template with others in your agency and sub-agencies.
- Choose the effective date of new policy and expiration date of prior current policy to auto-fill into applications.
- Click "Create Template".

Create as many templates as you'd like!

TASKS	View Tasks
Overdue	0
Today	0
Upcoming	0
No Due Date	0

ACTIONS

- [Create quote template](#)
- [Merge this applicant](#)
- [Link this applicant](#)

Create Quote Template

To create a template from the currently selected applicant, complete the items below and click the "Create Template" button. Otherwise, click "Cancel" to continue without creating a template.

Template Name *

Share with others in my immediate agency

Share with others in sub-agencies of mine

Effective Date

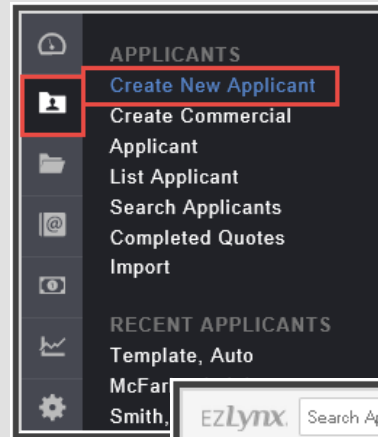
Expiration Date

STEP 2:

Using the Template

- Whenever you create a new applicant you will have the option to select a template from the "Quote Template" dropdown.
- The application will auto-fill the application with the template information, which saves you time!


Now let's take a look at managing your templates.



A screenshot of the EZLynx 'CREATE NEW APPLICANT' form. The form is white with a dark sidebar on the left. The sidebar has a search bar and a list of icons. The main form area has a search bar and a list of fields: 'Applicant Information', 'First Name *', 'Last Name *', 'Rating State *', 'Lead Source', 'VIP', and 'Customer Since'. The 'Quote Template' field is highlighted with a red box, and its dropdown menu is open, showing options: '<Do Not Use a Template>', '<Do Not Use a Template>', 'Auto 100/300', 'Auto 300/500', 'HO3 over \$300,000', 'HO3 under \$300,000', and 'Renters'. A 'Create New Applicant' button is at the bottom.

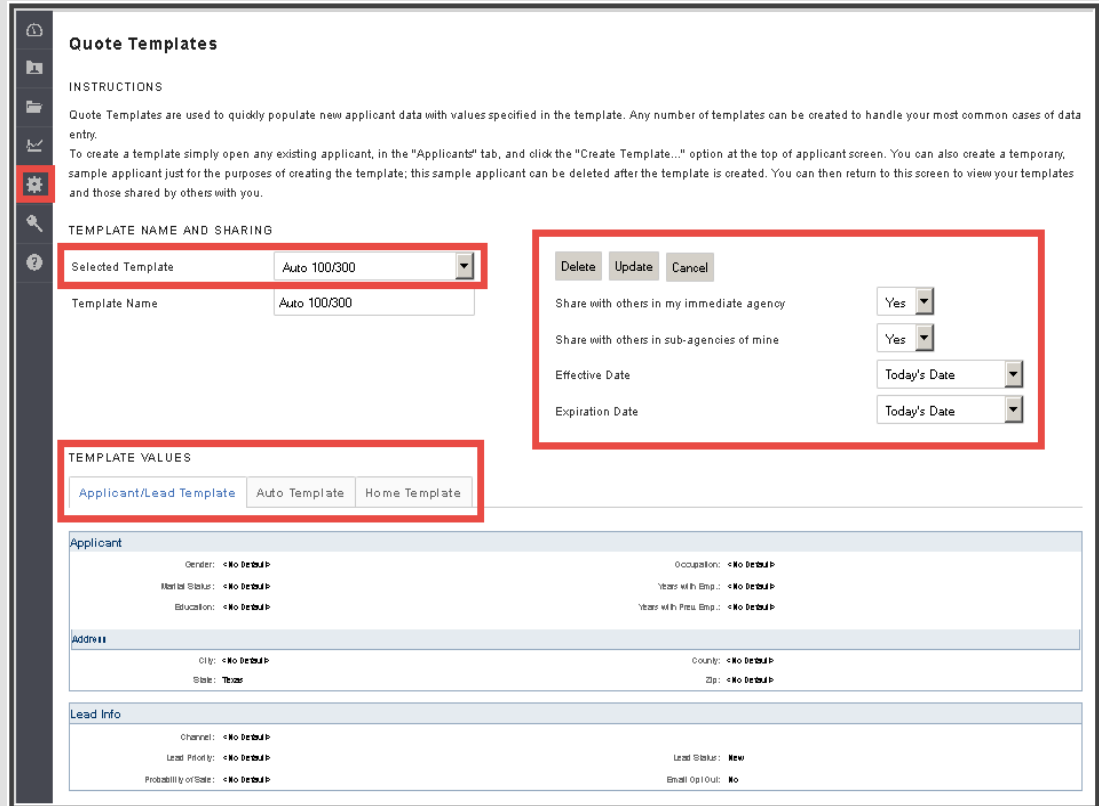
STEP 4:

Managing Your Templates

- Hover over Settings icon 
- Select Quote Templates
- Choose a template to view from the "Selected Template" dropdown.
- From here, the template can be deleted, or the name and sharing information can be updated.
- At Template Values, you can view the information in the template by selecting one of the tabs – Applicant/Lead, Auto or Home template.

Remember, a template cannot be edited – must create a new template.

Questions? Contact support@ezlynx.com.



Quote Templates

INSTRUCTIONS

Quote Templates are used to quickly populate new applicant data with values specified in the template. Any number of templates can be created to handle your most common cases of data entry.

To create a template simply open any existing applicant, in the "Applicants" tab, and click the "Create Template..." option at the top of applicant screen. You can also create a temporary, sample applicant just for the purposes of creating the template; this sample applicant can be deleted after the template is created. You can then return to this screen to view your templates and those shared by others with you.

TEMPLATE NAME AND SHARING

Selected Template: Auto 100/300

Template Name: Auto 100/300

Delete Update Cancel

Share with others in my immediate agency: Yes

Share with others in sub-agencies of mine: Yes

Effective Date: Today's Date

Expiration Date: Today's Date

TEMPLATE VALUES

Applicant/Lead Template Auto Template Home Template

Applicant

Gender: <No Detail> Occupation: <No Detail>

Marital Status: <No Detail> Years with Emp.: <No Detail>

Education: <No Detail> Years with Pres. Emp.: <No Detail>

Address

City: <No Detail> County: <No Detail>

State: Texas Zip: <No Detail>

Lead Info

Channel: <No Detail> Lead Status: New

Lead Priority: <No Detail> Email Opt Out: No

Probability of Sale: <No Detail>