

MANAGEMENT SYSTEM

MANAGE & RUN YOUR AGENCY FROM ANYWHERE

Maximize your agency's potential with our cloud-based easy-to-use management system.

BENEFITS



Improve Productivity

Built on the EZLynx Rating Engine, you can save time by leveraging one system to manage new applications, quote, create proposals, complete ACORD forms and certificates without duplicating data.



Increase Profitability

Streamlining and automating repetitive activities allows agencies to focus on growing. Tools, like Agency Pulse, deliver accurate business insights in a simple automated email report owners can use to make decisions at a glance.



Simplify Management

Multi-tasking and collaboration tools are built in to streamline day-to-day activities between various departments within your agency. Reports and dashboards provide high-level views of activities and completion rates for tasks. Commission tools simplify tracking and management of payments.



Optimize Serviceability

Stay competitive with an omni-channel approach for policy issuance and servicing. A Robust set of communication and self-servicing tools allow your customers to get service their way!

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FEATURES

» **Agency Workspace**

An agency collaboration tool that includes, notes, tasks, reminders, and notifications.

» **Agency Pulse**

A monthly analytics report that provides performance metrics to monitor and improve agency health.

» **Policy Sync**

Update a rating application from current policy information at renewal time for fast re-quoting.

» **Policy Compare**

Tool for viewing policy transactions side-by-side comparison to explain premium increases and more.

» **Policy Downloads**

Customer policy data is downloaded to the EZLynx account and automatically matched to existing personal and commercial customers

» **Commercial Quote Tracking**

Ability to manually record commercial quotes in applicants' EZLynx accounts.

» **Commercial Policy Entry**

Record Commercial policy information based on ACORD standards. Guides agent to ACORD forms needed for each specific line of business.

» **Commercial Application Entry**

Enter application data into EZLynx once in order to automatically create ACORD form.

» **Commercial Proposals**

Automatically create commercial proposals for multiple LOBs to present to prospective customers.

» **Claims**

Record policy claims in customers' EZLynx accounts.

» **Commissions**

A percentage of policy premium that is paid to an agency/agent for selling a policy for a carrier.

» **Document Management**

Ability to manage required insurance documents in an organized and efficient manner in EZLynx.

» **Accounting**

Track commissions earned, owed, and paid for both agency bill and direct bill policies. Keep your premium trust in balance, and manage receivables and payables.

» **Retention Center***

Patented tool using predictive analytics to identify and manage high risk renewals for an agency.

» **Sales Center***

Pipeline management tool to simplify the supervision and tracking of the sales process.

**Sold separately*