

IN THIS ISSUE

- ✘ EZLynx Rating Integration

EZLynx Rating Integration

Nexsure provides real-time integration with the EZLynx online rating portal. When using EZLynx in conjunction with Nexsure, you must have a valid account set up through EZLynx. This document explains how to set up your EZLynx login information in Nexsure and enable uploads from Nexsure to EZLynx before using your EZLynx account with Nexsure.

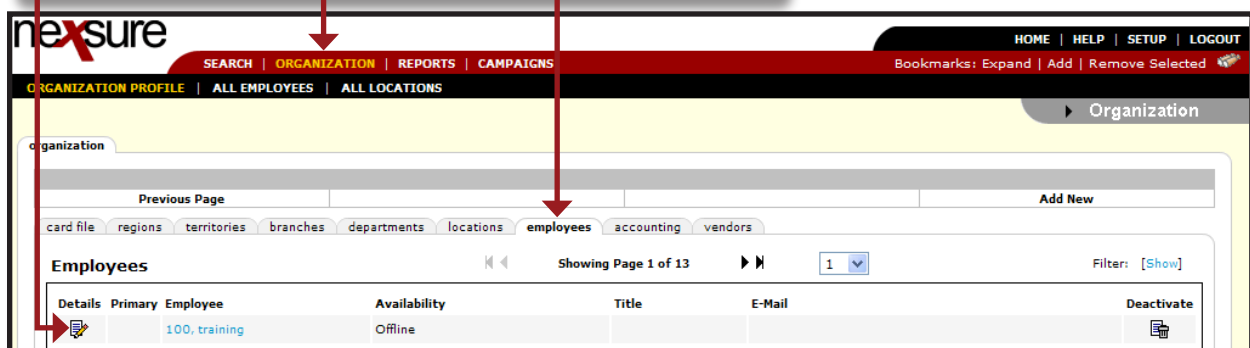
Enable Uploads to EZLynx

Send an email to EZLynx support staff (support@webcetera.com) requesting that your agency be enabled for uploads from XDimensional Technologies, Inc./Nexsure. The email request does not have to come from a Nexsure representative. Enabling uploads allows information from your Nexsure application to upload to the EZLynx rater.

Set Up an Additional Login for EZLynx

Set up an additional login in Nexsure to automatically log you in to your EZLynx account. You must have a valid EZLynx account to set up your additional login. Perform the following steps to set up an additional login:

1. On the **Primary** menu, click **ORGANIZATION > employees** tab and click the **Details** icon of the appropriate employee.



2. Click the **additional logins** tab.

Details	Login Type	Account No.	Login	Description	Date Created	Remove
	AM Best		betsy.cormier@xdti.com		8/4/2008	

3. Click the **Add New** link.

4. In the **Add a new Login** dialog box, select **EZLynx** from the **Additional Login Type** list.

Add a new Login

Additional Login Type:

Account Number:

Login ID:

Password:

Confirm Password:

Department ID: (optional)

Description:

5. Type in the required fields for **Login ID**, **Password** and **Confirm Password**. Replace the Nexsure default **Login ID** with your EZLynx Login ID and click **Save**.

Rating Integration

Rating integration can only be accessed from an active marketing record in Nexsure:

- To rate a new policy: On the **Client** menu, click **SERVICING** and select **Marketing > New line of business**.
- To rate an In Force policy: On the **Client** menu, click **POLICIES**, right-click on the In Force policy's **Details** icon and select **Market Existing** to create a copy of the policy in marketing.

Notes:

- Integration with EZLynx will fail if the application is blank.
 - Quotes obtained using EZLynx cannot be imported (bridged) back to Nexsure.
 - Supported Lines of Business are listed in **HELP > Rating Integration** documentation. Look for future updates to the supported lines of business in **HELP > Planned Development > Enhancements > Integration**.
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Access Nexsure rating integration using one of the following 3 methods:

Option 1: MARKETING on the Client Menu

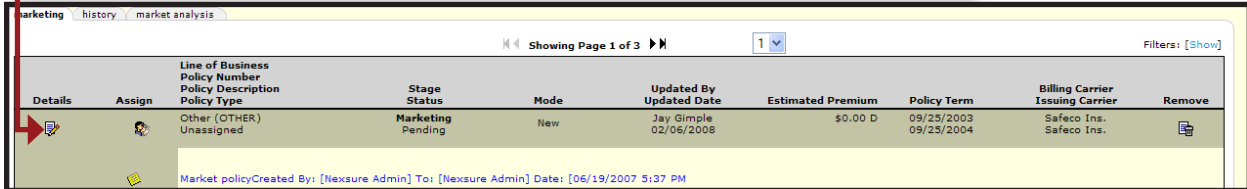
1. From the marketing summary, right-click the **Details** icon of the marketing record you want to quote and select **Rate** from the list.




The screenshot shows the Nexsure web interface. At the top, there is a navigation bar with 'HOME | HELP | SETUP | LOGOUT' and a search bar. Below that is a menu with 'CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG'. The main content area shows a table of marketing records. The table has columns for 'Line of Business', 'Policy Number', 'Policy Description', 'Policy Type', 'Stage Status', 'Mode', 'Updated By', 'Updated Date', 'Estimated Premium', 'Policy Term', 'Billing Carrier', 'Issuing Carrier', and 'Remove'. A record is highlighted with a 'Details' icon (a document with a pencil) in the 'Remove' column. A context menu is open over this icon, listing options: 'Open', 'Market Existing', 'Mass Marketing', 'Print', 'Rate', 'Re-rate', 'Send to History', and 'Submit'. A red arrow points from the 'Rate' option in the menu to the 'Details' icon in the table.

Line of Business	Policy Number	Policy Description	Policy Type	Stage Status	Mode	Updated By	Updated Date	Estimated Premium	Policy Term	Billing Carrier	Issuing Carrier	Remove
Auto - Personal (PAU)				Marketing Pending	New	Betsy Cormier	08/04/2008	\$0.00 D	08/04/2008 08/04/2009	Hartford Insurance G	Unassigned	Details


Option 2: Marketing Underwriting

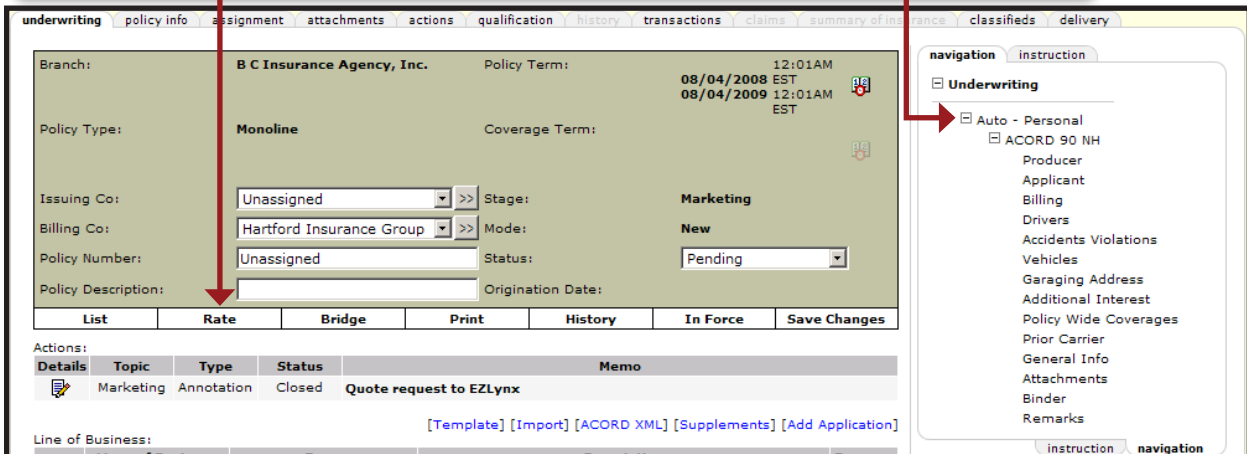
1. Click the **Details**  icon of the marketing record to display the **underwriting** tab.



Details	Assign	Line of Business Policy Number Policy Description Policy Type	Stage Status	Mode	Updated By Updated Date	Estimated Premium	Policy Term	Billing Carrier Issuing Carrier	Remove
		Other (OTHER) Unassigned	Marketing Pending	New	Jay Gimple 02/06/2008	\$0.00 D	09/25/2003 09/25/2004	Safeco Ins. Safeco Ins.	

Market policy Created By: [Nexsure Admin] To: [Nexsure Admin] Date: [06/19/2007 5:37 PM]

2. Click the **Expand**  icon in the navigation tree to open the tree view of the line of business to be quoted. Expanding the tree view of the line of business application will activate the **Rate** link on the navigation toolbar. If the tree view is closed, the Rate option will be grayed out.



Branch: B C Insurance Agency, Inc. Policy Term: 08/04/2008 EST 12:01AM
08/04/2009 EST 12:01AM

Policy Type: Monoline Coverage Term:

Issuing Co: Unassigned Stage: Marketing
Billing Co: Hartford Insurance Group Mode: New
Policy Number: Unassigned Status: Pending
Policy Description: Origination Date:

navigation instruction


- Underwriting
 - Auto - Personal
 - ACORD 90 NH
 - Producer
 - Applicant
 - Billing
 - Drivers
 - Accidents Violations
 - Vehicles
 - Garaging Address
 - Additional Interest
 - Policy Wide Coverages
 - Prior Carrier
 - General Info
 - Attachments
 - Binder
 - Remarks

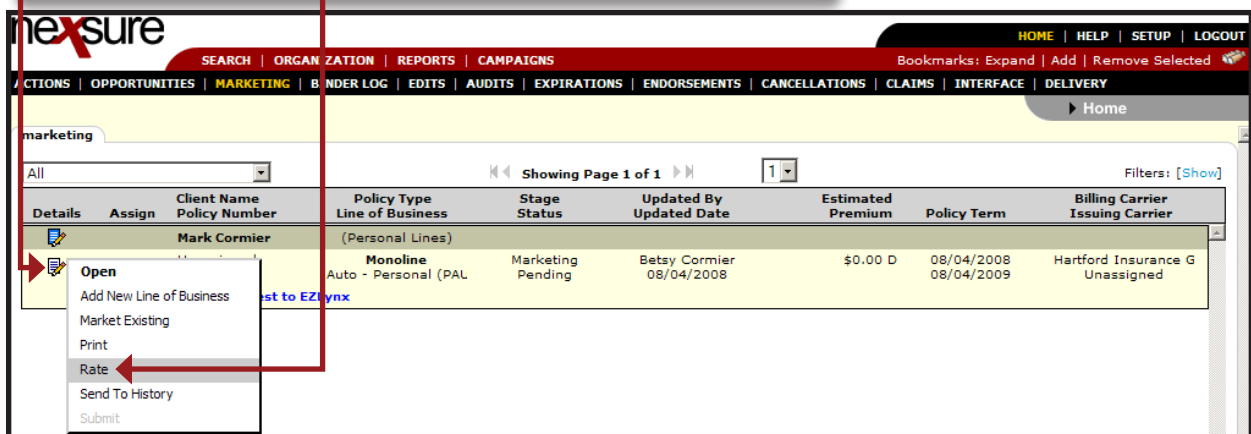
Rate Bridge Print History In Force Save Changes

Actions: Details Topic Type Status Memo
Marketing Annotation Closed Quote request to EZLynx

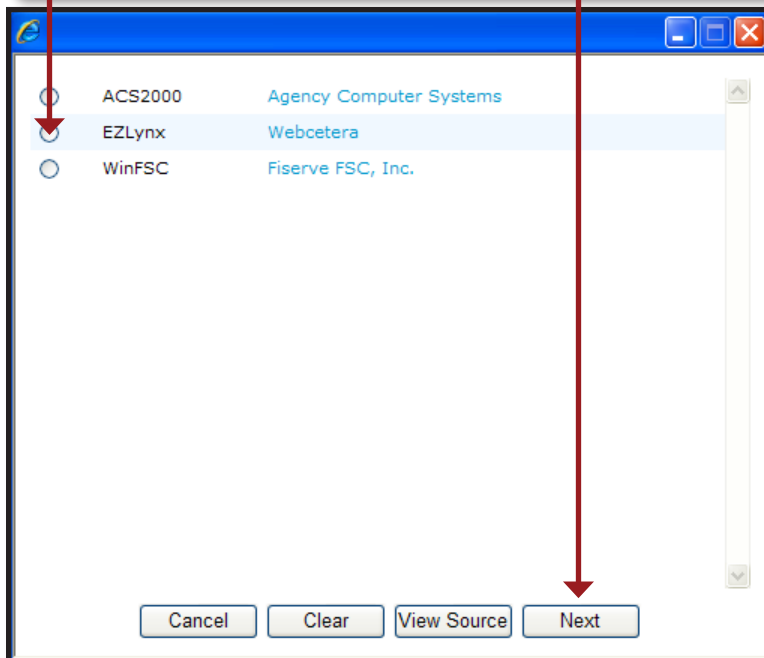
[Template] [Import] [ACORD XML] [Supplements] [Add Application]

Option 3: MARKETING on the Home menu

1. From the marketing summary, right-click the **Details**  icon of the marketing record you want to quote and select **Rate** from the list.



2. Select **EZLynx** on the **Rating Vendor System** dialog box. This dialog box will list all available vendors which are enabled and support the selected marketing application's line(s) of business. Click **Next** to continue and submit the Nexsure marketing application(s) detail to the selected rating vendor.



3. A new browser window will open to the **EZLynx** Web site.

Note: First time entry into EZLynx will require a manual login to begin the session.

The screenshot shows the EZLynx web application interface. The main navigation bar includes 'Home', 'My Account', 'EZUpload', 'Applicant (New Quote)', 'DashBoard', 'Completed Quotes', 'Support', and 'Log Out'. The left sidebar shows 'Recent Items' with 'Applicants' and 'Quotes' sections. The main content area is titled 'Assigned To: Test Account' and contains the following form sections:

- Applicant Information:** Fields for Prefix, First*, Last*, DOB*, Gender*, Marital Status*, SSN, Occupation Industry*, Occupation Title* (with 'for' and 'years' fields), Years at Prior Employer, and Education. Red arrows point to SSN, Occupation Industry*, Occupation Title*, Gender*, Marital Status*, and Years at Prior Employer.
- Co-Applicant Information:** A checkbox labeled '(select to specify Co-Applicant)'. This section is currently unchecked.
- Applicant Address:** Fields for Line #1*, Line #2, City* (BOULDER), State* (CO), County* (Boulder), Zip* (80305 - 6354), Home Phone* (with 'Mobile' field), Work Phone (with 'Ext.' field), Email, and Years* (with 'Months' field). Red arrows point to Home Phone* and Years*.

Buttons for 'Edit' and 'Delete' are located at the bottom of the form.

Interface





Every transaction which is submitted from Nexsure is tracked through the **INTERFACE** link on the Home menu. This provides detailed information pertaining to the client, policy, lines of business, submission type and result of the submission.



Interface Summary

The interface summary screen provides an overview of the data or file which was uploaded from Nexsure to EZLynx. There will be one unique **Interface ID** for each rate submission to EZLynx. The rate submission's **Status** is **Pending** and will remain pending because data is not returned from EZLynx to Nexsure.


Details	Interface ID Carrier Sequence ID	Carrier	File Name File Type	Import Date Completed Date	Exceptions Transactions	Status	Remove
	1		633512979543339872.XML (1k) ACORD XML	7/10/2008	0 1	Pending	
	2		633529411474218770.XML (1k) ACORD XML	7/29/2008	0 1	Pending	
	3		633529412058910012.XML (1k) ACORD XML	7/29/2008	0 1	Pending	

Interface Details Screen

1. Click the **Details**  icon of a transaction to view the interface details screen. The interface details screen provides information regarding each specific transaction within the submission. The blue **Details**  icon on the interface details screen links directly to the Client Profile. The white **Details**  icon links to the marketing record from which the rate submission originated. If the original marketing record has been placed in force, the white **Details**  icon will link to the policy that is in force.

Details	Client Name Policy No	Applicant Name Line of Business	Carrier Seq. ID Interface Type	Process Date Import Status	Premium Downloaded	Term	Vendor Date Updated	Carrier Branch/ NAIC	Remove
	Unassigned	HOME	Quote	12/3/2007 Marketing Quote	\$0.00	10/18/2008 10/18/2009	EZLynx 12/3/2007	/	

Marketing Quote Request Sent

2. The transaction is for information only and may be deleted by clicking the **Remove**  icon within the interface details or from the interface summary for the Interface ID to be deleted.