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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.

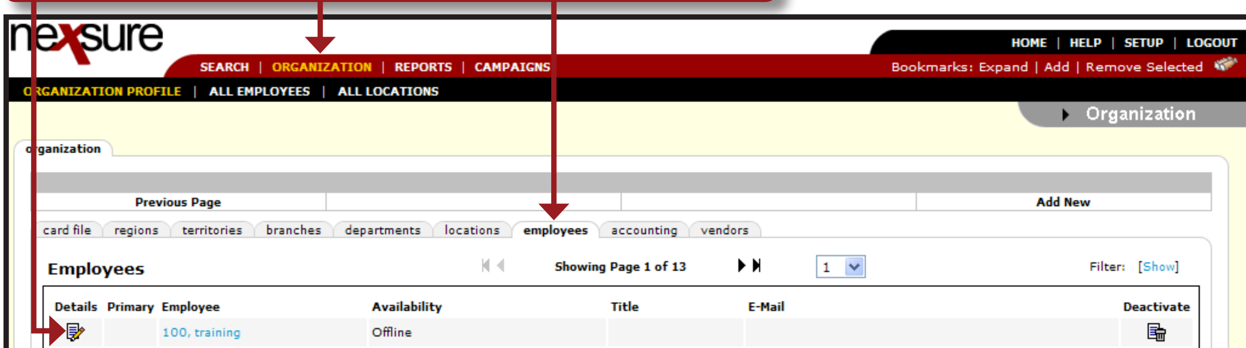
Enable Uploads to EZLynx

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.

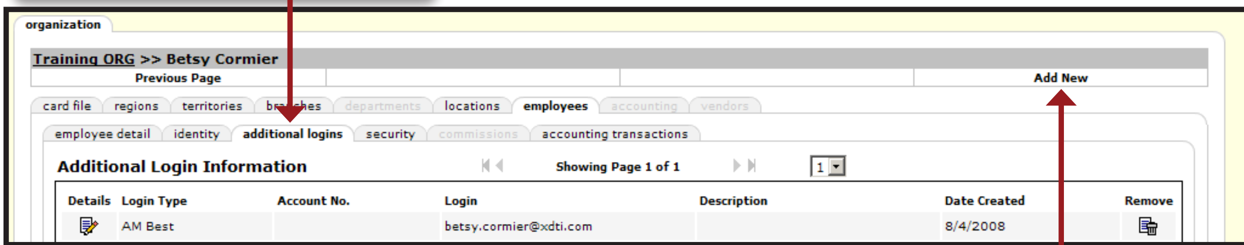
Set Up an Additional Login for EZLynx

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.

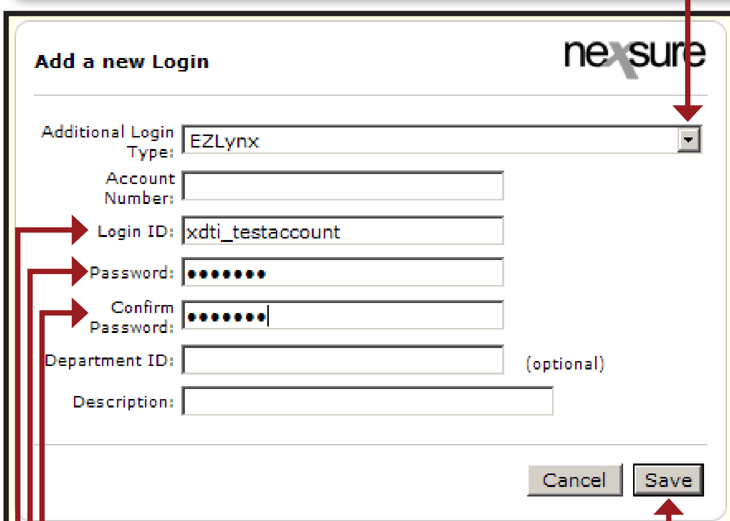


2. Click the **additional logins** tab.



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

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



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**.

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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.

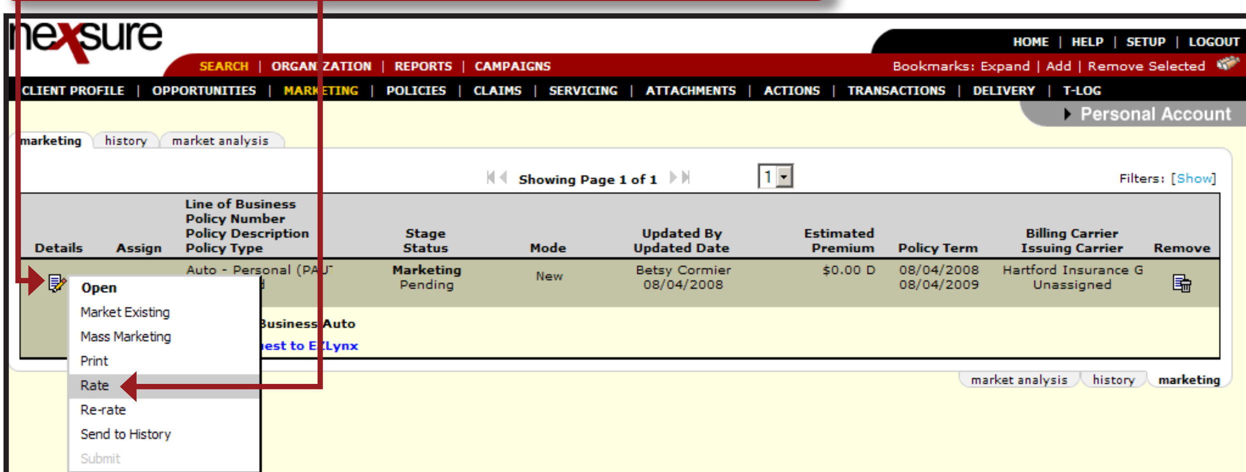
Notes:

- 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**.

Access Nexsure rating integration using one of the following 3 methods:

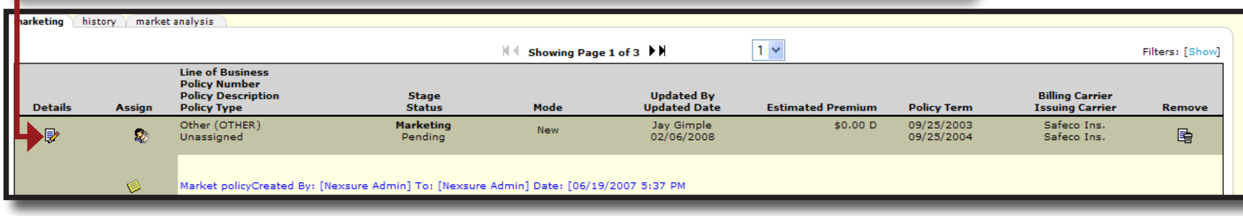
Option 1: MARKETING on the Client Menu

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

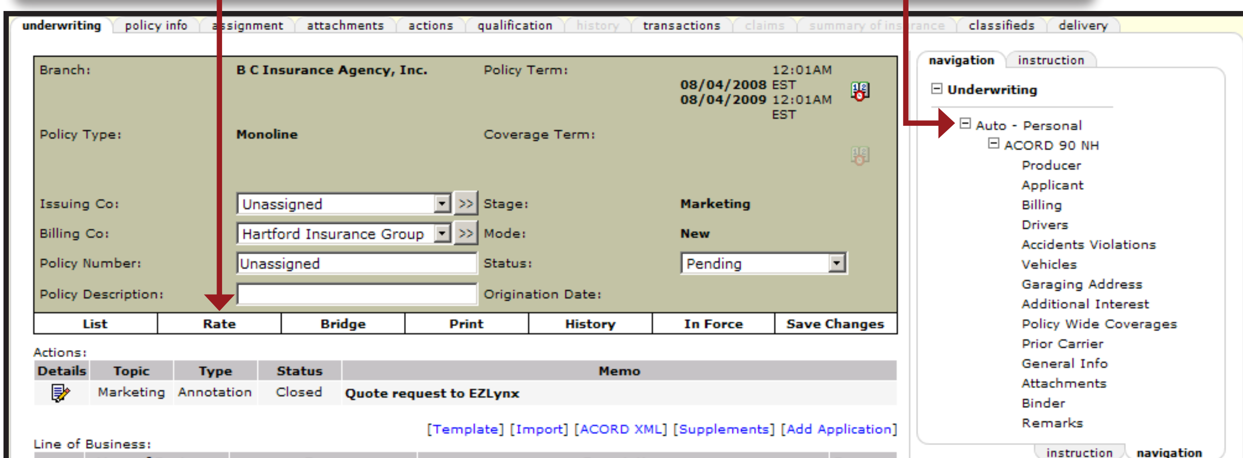


Option 2: Marketing Underwriting

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



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.



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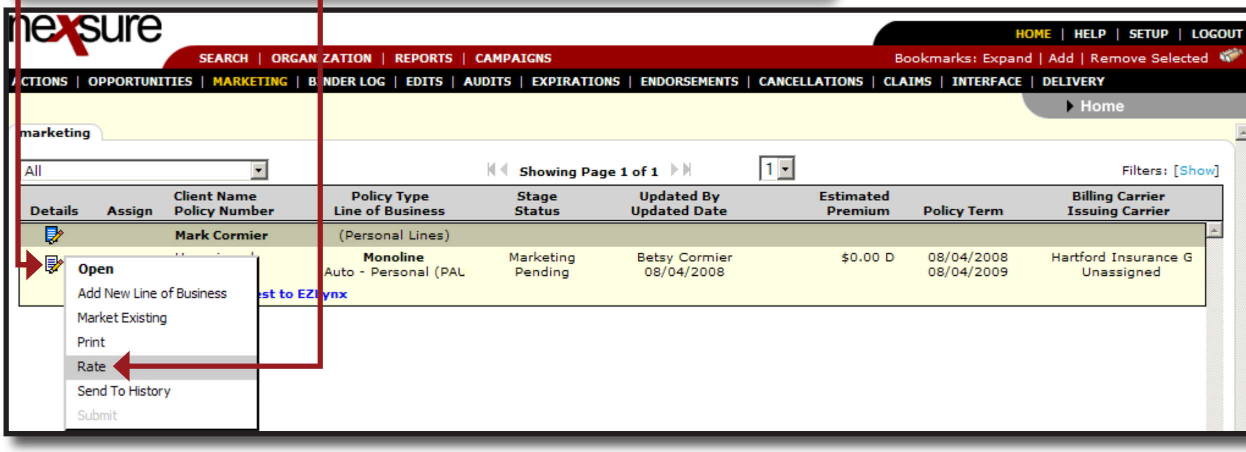
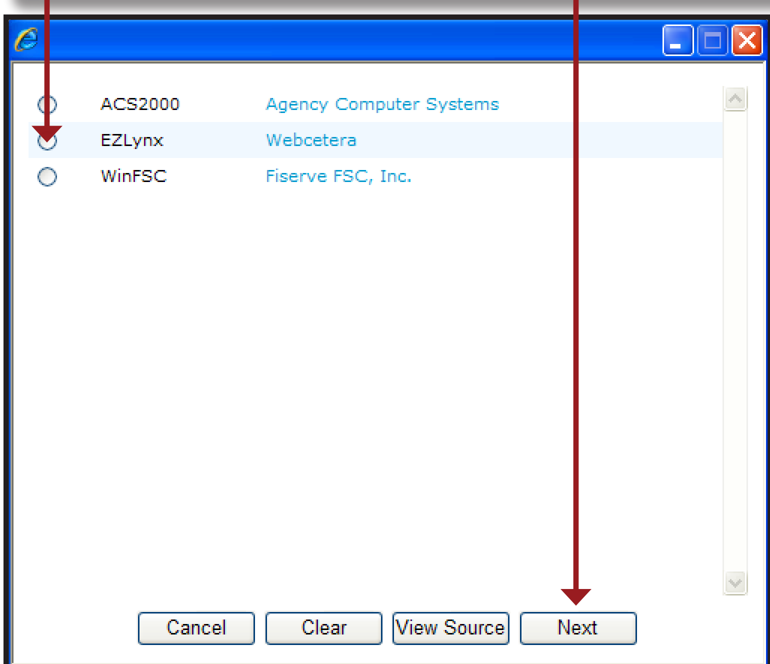
Option 3: MARKETING on the Home menu

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

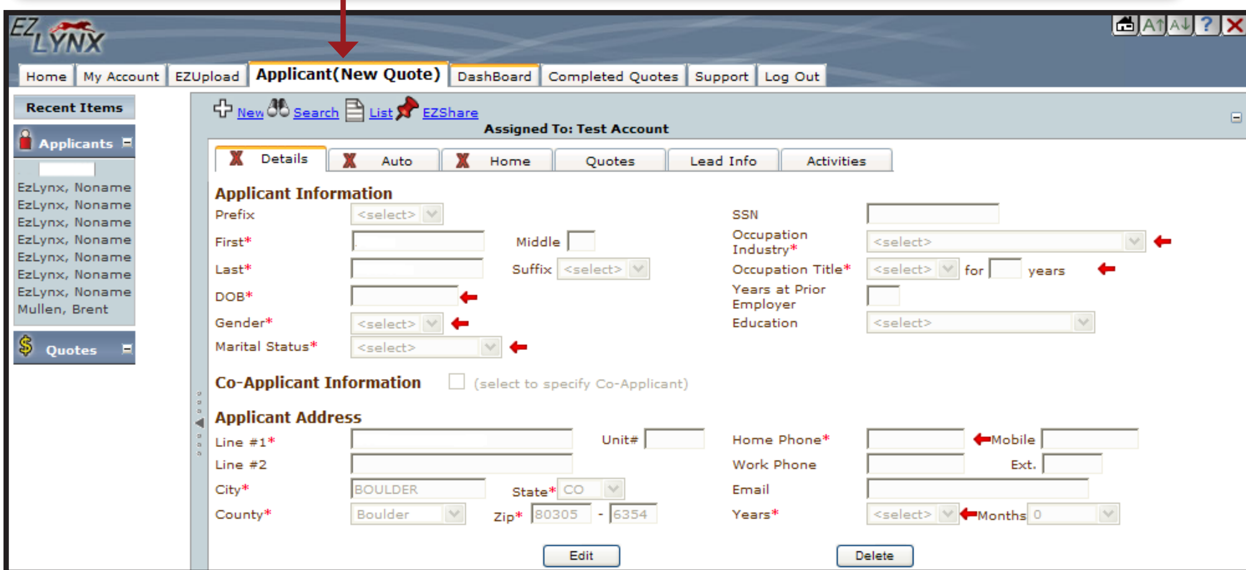


2. Select **EZLynx** on the **Rating Vendor System** dialog box. This dialog box will list all available vendors which are enabled and support the selected marketing application's line(s) of business. Click **Next** to continue and submit the Nexsure marketing application(s) detail to the selected rating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

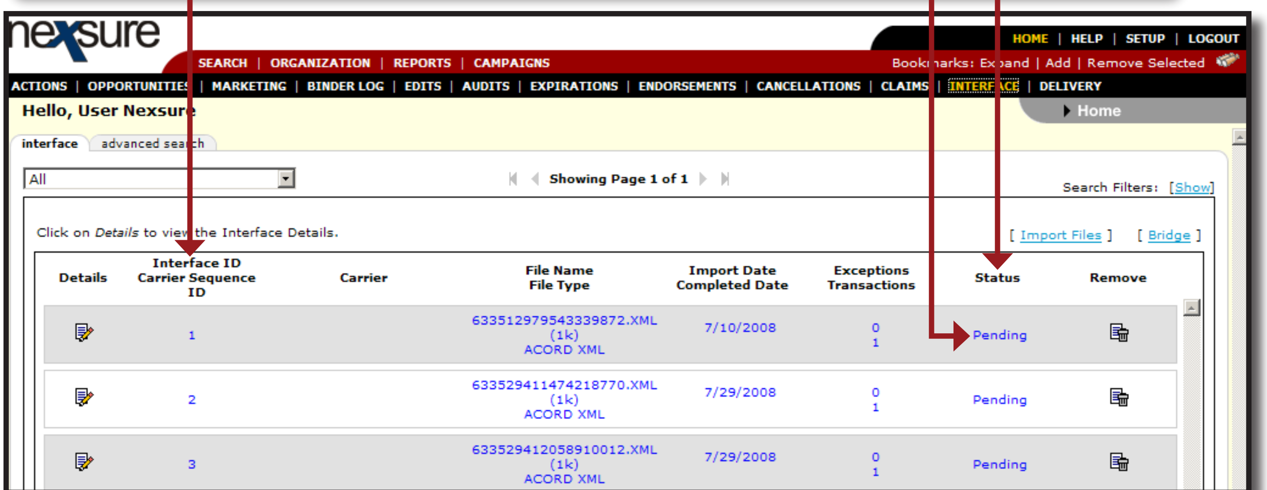


Interface

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.

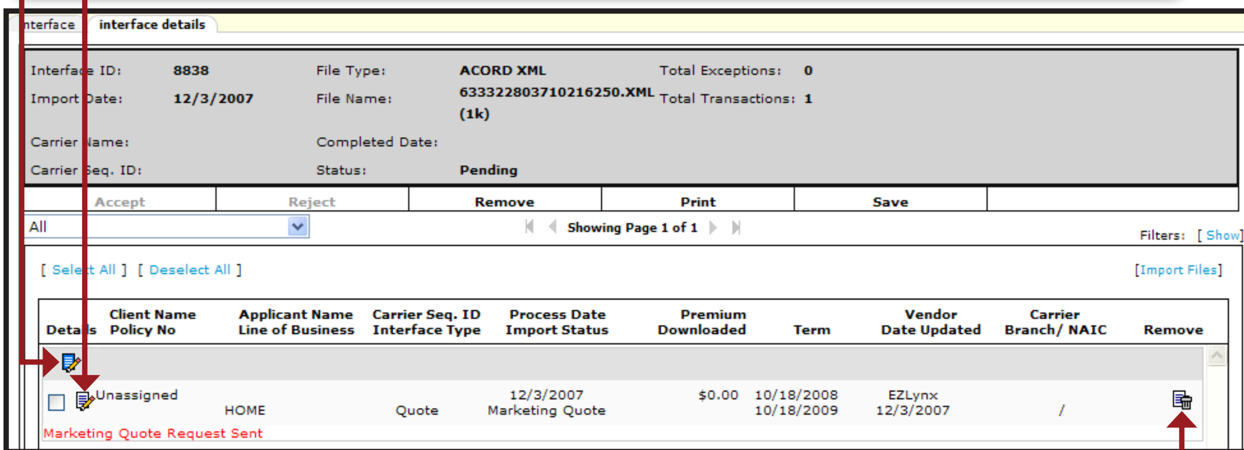
Interface Summary

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.



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.



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.