

# EZLYNX GUIDE

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## Carrier Guidelines & Desk References

Current versions of the carrier desk references are located on the NBS website. Navigate to the Network Carrier Availability page and choose your state. The desk references are listed under each of the shared carriers (the carriers bound through NBS).

The screenshot shows the Nationwide Brokerage Solutions website interface. At the top right, it says "Welcome: wilders5" and "New York" with a dropdown menu. Below this are navigation tabs: Personal Main, DIY Personal, Brokerage, Network (highlighted), AIDOO, and Nonstandard Auto. Underneath are more tabs: Network, Basics, Carrier Availability (highlighted), and Quoting Platforms. The main heading is "Carrier Availability" with a subtext: "Use our tool below to find the carrier information your looking for in your state." There are three dropdown menus: "Select a state:" (New York), "Select a carrier type:" (-- show all carriers --), and "Select a product:" (-- show all products --). A green callout box points to the "Select a state:" dropdown with the text "Select your state". Below this is the "Shared Carriers" section. It includes the ASI logo and text: "Progressive Home (formerly American Strategic Insurance) Homeowners, Monoline Home, Renters, Condo, Dwelling Fire". Underneath, there are three items: "Target Markets: Preferred", "ASI Desk Reference" (highlighted), and "Appointment Process". A green callout box points to the "ASI Desk Reference" item with the text "Carrier Desk References listed under the carriers". At the bottom of the ASI section, there is a link for "Quote, Service and Contact".

## Setting Up Carrier Logins

Carrier quoting set up can be done from the homepage or the settings menu. From the “My Carrier Logins” page, set each carrier’s login.

**Before you can start quoting...**

Please set up the following:

- 1 My Carrier Logins
- 2 Carrier Defaults
- 3 Quote Templates (Optional)
- 4 Mail Quoting Personal

**My Carrier Logins**

**INSTRUCTIONS**

**INDEPENDENT ACCOUNTS**

Carrier Name	Login Status
National General	No Default Login is set. Please click 'Set' to enter the carrier login.
Progressive Insurance	No Default Login is set. Please click 'Set' to enter the carrier login.
Universal Property & Casualty Insurance Company	No Default Login is set. Please click 'Set' to enter the carrier login.

**SHARED ACCOUNTS**

Carrier Name	Login Status
ADI/Progressive	Quoting is Enabled
Encompass	Quoting is Enabled
Encompass Insurance	Quoting is Enabled
MetLife Auto & Home	Quoting is Enabled
Safeco Insurance	Quoting is Enabled

**Set Carrier Login**

Please enter your carrier assigned credentials (carrier site login information)

Carrier: National General

Rating State Default

username

password

Save and Test

Set Login

**Independent accounts require you to set up YOUR user id and password.**

**"These are user specific"**

**To set Login:**

1. Click "Set Login"
2. Enter your user id and password
3. Click "Save & Test"

\*Shared accounts are already set-up by NBS

## Installing the EZLynx Login Plugin

1. Click on the box on the dashboard to install the login plugin.
2. Choose the “EZLynx Plugins” option from the settings menu to access activation code.
3. The activation code displays on the next page. Codes are unique to each user.

**Installed Products**

None Detected.

Install New EZLogin

Click here to install

**EZLynx** Search Applicants

Settings

- Carrier Quoting Setup
- EZLynx Preferences
- My Contact Info
- Security Settings
- EZLynx Plugins**
- Email Signature
- Certificate Upload
- Manage Lead Sources
- Manage Carriers/Markets
- Manage Billing Companies
- Manage Lines of Business
- Manage Departments
- Email Subscription Management
- Manage Form Templates
- Role Settings
- Agency Admin

For the activation code, please go to the settings menu, select "EZLynx Plugins"

## Entering Producer Codes on the Carriers Page

Carriers that quote with the NBS producer code require the code to be entered into the comments field. See below carrier contact and producer codes for each carrier's code.

Overview Details Quotes Lead Info Contacts Documents Requests Activity

**Auto Application: COMPLETE**

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

**Additional Carrier Questions**

**Carrier: Encompass Insurance**

Producer Code\* ?

Full Pay Discount\*\* ?

Vehicle Date Purchased for 2010 NISSAN if earlier than Policy Effective Dat... (more)\* ?

Vehicle Date Purchased for 2016 TOYOTA if earlier than Policy Effective Dat... (more)\* ?

Easy Pay Discount\*\* ?

Comp w/Acc Air Bag deploy fo... ?

Comp w/Acc Air Bag deploy fo... ?

Apply Future Effective Date Discount? ?

**Carrier: MetLife Auto & Home®**

If you want to work as another agent enter a valid ID  ?

**Carrier: Safeco Insurance**

Producer code (If left blank Agent code will be used.)  ?

Safeco Coverage Level for all Vehicles.  ?

Please enter the purchase date of vehicle,  (Purchase d... ?

Producer Name  ?

Please enter the purchase date of vehicle,  (Purchase da... (more)\* ?

Other Safeco Policy - Homeowners, Condo,  ?

## Carrier Service Center Contacts & Producer Numbers

Carrier	Producer Code	Service Center
ASI	434596	866-274-8765
Encompass	340-120731	877-721-6150
Grange	IN- 1301938	855-299-2040
	IL- 1201737	
	KY- 1601697	
	PA- 3701776	
	TN- 4101638	
	VA- 4501614	
MetLife	1ED4551	800-422-4272
Safeco	316509	866-472-3326
Travelers	ODFX90	800-842-5075

## Finalizing Quotes

Separate submissions are required for home and auto.

1. From the quote page, click the “Finalize Premium” button.
2. Complete the box that pops up (see below).
3. Click “Request Final Premium.”

**Underwriting Request**

Finalize Request

Incomplete Request

Comments

Hide system comments      Sorting: Newest First

Enter Any Comments & Additional Information here

Request Subject: MetLife Auto & Home Auto Finalize Premium for: Nationwide, Nathan  
Requested By: Stacy Stacy (NBS Staff) on 10/11/18 1:45 PM  
Underwriter: Amanda DeFide, Cherith Williamson, Devon Franz, Jeff Kanowsky, Lexi Anthony, Michael Munson, Rebecca Horn, Alexandra Anthony

Quote Summary

QUOTE DETAILS

Quoted Premium: \$1,842.00 @12 Month Premium  
Quote Number: 144685282  
Carrier: MetLife Auto & Home  
LOB: Auto  
Applicant: Nationwide, Nathan  
Finalized Premium: \$0.00  
Attachment: Quote Proposal

DRIVER INFO

Name	DOB	DL	State
Nationwide, Nathan	9/4/1978	<input type="text" value="DRIVERS LICENSE NUMBERS"/>	OH

VEHICLE INFO

Year	Make	Model	VIN
2015	CHEVROLET	TRAX 1LT	<input type="text" value="KL7CJRCB9F1111111"/>

Attachments

Click here to add attachments:  
Such as, the required MSB for finalizing home risks.

## Binding Policies

1. From the quote page, click the “Bind Request” button.
2. Open the attachment for the Bind Request form.
3. Complete and save form.
4. Attach completed binding form.