

How to Check for Consumer Portal Quotes in EZLYNX

Login in to EZLynx.

Select Applicant (New Quote) NOTE the red flag, that also indicates an alert; you can click on the red flag and it will take you to a list of the new leads also. See DashBoard Alert at end of PDF.

EZ Create new applicant

Home My Account EZUpload **Applicant** DashBoard Completed Quotes Support Reports Admin Log Out

Recent Items

Applicants

- Doe, Jane
- Williams, Wil
- Casey, Deb

Actions New applicant

Applicant Information

First Name* ←

Last Name* ←

Rating state* ←

Select Actions, Search Applicants

unt EZUpload **Applicant** DashBoard Completed Quotes Support Reports Admin Log Out

Actions New applicant

- + Add Applicant
- Search Applicants**
- List Applicants

Applicant Information

←

←

←

Select EZLynx Consumer Portal in the LEAD CHANNEL:

Search....

Quick search... Starting with last name.
[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Applicant Search : Filter

First name:
 City: State: Zip:
 Date created from: Thru:
 Assignee:

Lead Search : Filter

Lead status: Lead channel:
 Probability of sale:

Display lead information in the search results

Click on the SEARCH button; and any consumer portal leads will show up.

[Home](#) [My Account](#) [EZUpload](#) [Applicant\(New Quote\)](#) [Dashboard](#) [Completed Quotes](#) [Support](#) [Reports](#) [Log Out](#)

[New](#) [Search](#) [List](#) Search....

[Refine Search](#) [Refresh Search results](#)

Search results : The first 250 matching applicants have been retrieved.
 Results ordered by: Date created DESCENDING Returned on: 7/22/2008 10:23:03 AM

Last name	First name	City	State	Zip	Created by	Date created	Lead status	Lead channel	Lead probability
Smith	Max	PLANO	TX	75024	Demo TestAccount	7/22/2008 9:54:23 AM	New	EZLynx Consumer Portal	Unknown
Skinner	Dan	MESA	AZ	85203	Demo TestAccount	7/21/2008 10:07:41 PM	New	EZLynx Consumer Portal	Unknown
Skinner	Dan	MESA	AZ	85203	Demo TestAccount	7/21/2008 10:01:52 PM	New	EZLynx Consumer Portal	Unknown
smitty	brian	FLOWER MOUND	TX	75028	Demo TestAccount	7/21/2008 5:51:43 PM	New	EZLynx Consumer Portal	Unknown
skondras	george	BAYSIDE	NY	11360	Demo TestAccount	7/21/2008 2:30:35 PM	New	EZLynx Consumer Portal	Unknown
skondras	george	BAYSIDE	NY	11360	Demo TestAccount	7/21/2008 2:21:46 PM	New	EZLynx Consumer Portal	Unknown
Smith	Fred	HUDSON	OH	44236	Demo TestAccount	7/21/2008 12:51:54 PM	New	EZLynx Consumer Portal	Unknown
Weber	Bill	PRESCOTT	AZ	86301	Demo TestAccount	7/18/2008 1:05:16 PM	New	EZLynx Consumer Portal	Unknown
Disco	Wendy	MECHANICVILLE	NY	12118	Demo TestAccount	7/18/2008 1:00:58 PM	New	EZLynx Consumer Portal	Unknown
MCATEE	HEIDI	MISSOULA	MT	59808	Demo TestAccount	7/18/2008 12:24:31 PM	New	EZLynx Consumer Portal	Unknown
SNYDER	TAMARA	GRAHAMSVILLE	NY	12740	Demo TestAccount	7/18/2008 9:33:08 AM	New	EZLynx Consumer Portal	Unknown
Ryan	James	POTTSVILLE	PA	17901	Demo TestAccount	7/17/2008 2:27:44 PM	New	EZLynx Consumer Portal	Unknown
Reimer	Phil	NAPERVILLE	IL	60565	Demo TestAccount	7/17/2008 2:19:59 PM	New	EZLynx Consumer Portal	Unknown
Reimer	Phil	NAPERVILLE	IL	60566	Demo TestAccount	7/17/2008 2:11:47 PM	New	EZLynx Consumer Portal	Unknown

You can also click on Completed Quotes and see any quotes that show up. Click directly on any line and it will take you right to that applicant. NOTE the description; LEAD OBTAINED through Consumer Portal.

Home My Account EZUpload Applicant(New Quote) **DashBoard** **Completed Quotes** Support Reports Log Out

Completed Quotes - Filter:

Show Quotes matching: LOB: <All> State: <select> Zip Code: Lead Channel: <All>

First Name: Last Name:

Use Date Range From Thru

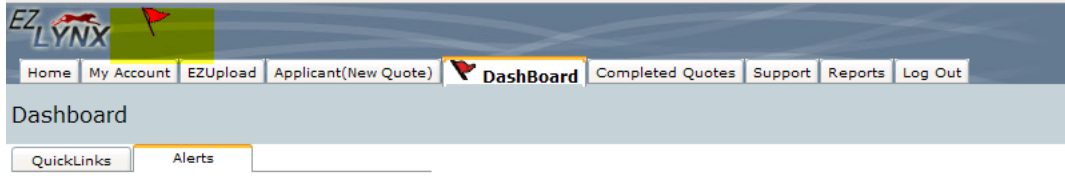
Instructions: To Filter your Displayed Quotes simply select the desired Filter criteria Then Press the SEARCH button to refresh the results.

Completed Quotes: 250 Found **More items are available, only the first 250 have been retrieved. Refine filter settings.**

Date	LOB	Name	State	ZipCode	Description
7/22/2008 9:54:23 AM	Auto	Smith, Max	TX	75024	Lead obtained through Consumer Portal
7/21/2008 10:07:41 PM	Auto	Skinner, Dan	AZ	85203	Lead obtained through Consumer Portal
7/21/2008 5:51:44 PM	Auto	smitty, brian	TX	75028	Lead obtained through Consumer Portal
7/21/2008 2:30:35 PM	Home	skondras, george	NY	11360	Lead obtained through Consumer Portal
7/21/2008 2:21:46 PM	Auto	skondras, george	NY	11360	Lead obtained through Consumer Portal
7/21/2008 12:51:55 PM	Home	Smith, Fred	OH	44236	Lead obtained through Consumer Portal
7/18/2008 1:05:16 PM	Auto	Weber, Bill	AZ	86301	Lead obtained through Consumer Portal
7/16/2008 1:06:42 PM	Home	Layton, Christine	WA	98038	Lead obtained through Consumer Portal
7/16/2008 1:06:42 PM	Auto	Layton, Christine	WA	98038	Lead obtained through Consumer Portal
7/15/2008 9:26:49 PM	Home	Smith, Kyle	OH	44883	Lead obtained through Consumer Portal

1 2 3 4 5 6 7 8 9 10 ...

DASHBOARD ALERT.....waving red flag when you log into EZLYnx. Just click on any description line and it will take you to that



1144 Alerts found for user:Demo TestAccount

Instructions:

- Click on the link in the description below to acknowledge and display the information related to a specific alert.
- Click on the trash can image below to clear a specific alert.
- Click on the 'Clear All Alerts' button to clear all displayed alerts.

Action	Date-Time	Alert Type	Description
	7/22/2008 9:54:23 AM	ConsumerPortal	New lead registered through CP
	7/21/2008 10:07:41 PM	ConsumerPortal	New lead registered through CP
	7/21/2008 10:01:52 PM	ConsumerPortal	New lead registered through CP
	7/21/2008 5:51:43 PM	ConsumerPortal	New lead registered through CP
	7/21/2008 2:30:35 PM	ConsumerPortal	New lead registered through CP
	7/21/2008 2:21:46 PM	ConsumerPortal	New lead registered through CP
	7/21/2008 12:51:54 PM	ConsumerPortal	New lead registered through CP
	7/18/2008 1:05:16 PM	ConsumerPortal	New lead registered through CP
	7/18/2008 1:00:59 PM	ConsumerPortal	New lead registered through CP
	7/18/2008 12:24:31 PM	ConsumerPortal	New lead registered through CP
	7/18/2008 9:33:08 AM	ConsumerPortal	New lead registered through CP
	7/17/2008 2:27:44 PM	ConsumerPortal	New lead registered through CP
	7/17/2008 2:19:59 PM	ConsumerPortal	New lead registered through CP
	7/17/2008 2:11:47 PM	ConsumerPortal	New lead registered through CP
	7/16/2008 1:06:39 PM	ConsumerPortal	New lead registered through CP
	7/15/2008 9:58:15 PM	ConsumerPortal	New lead registered through CP

applicant.