

How to configure caller recognition and screen-pop for:

EZLynx

Contact replication method: None

Screen pop method: Phone integration URL

Prerequisites

No prerequisites are required, and nothing needs to be configured within EZLynx.

Notes

EZLynx supports phone integration by URL. With an incoming call, the user can 'screen pop' the insured caller's Applicant Overview by clicking a button. If EZLynx has multiple matches for the caller's number, it will bring up the Applicant Search window. Then the user can click the insured's name for instant access to the account.

Applicant Search

[Search Applicants](#) [Personal Lines](#) [Commercial Lines](#)

9405552222

Search on:

☐ First Name ☐ Last Name ☐ Co-Applicant ☐ Business Name ☐ Email ☐ Policy Number ☐ Applicant Id

Filter by:

Personal / Commercial

Assignment:

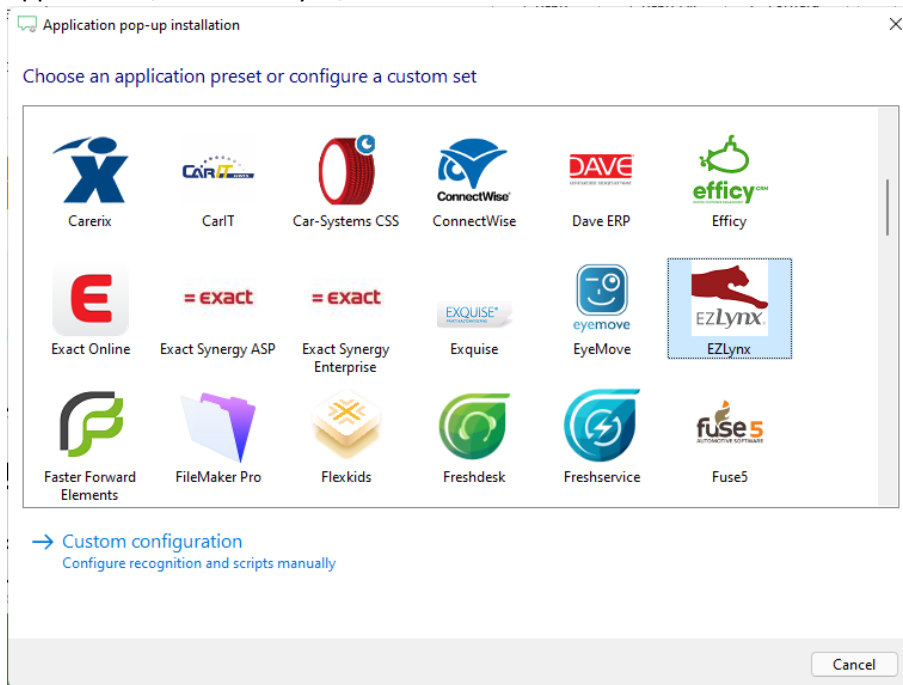
☐ Show only my Applicants ☒ Show All Applicants

Insured's Name
Street 1, City, State Zipcode
Phone: 9405552222 Email: email@email.com Assigned: Insured's Name
[Overview](#) [Details](#) [Quotes](#) [Lead Info](#) [Documents](#) [Activity](#)

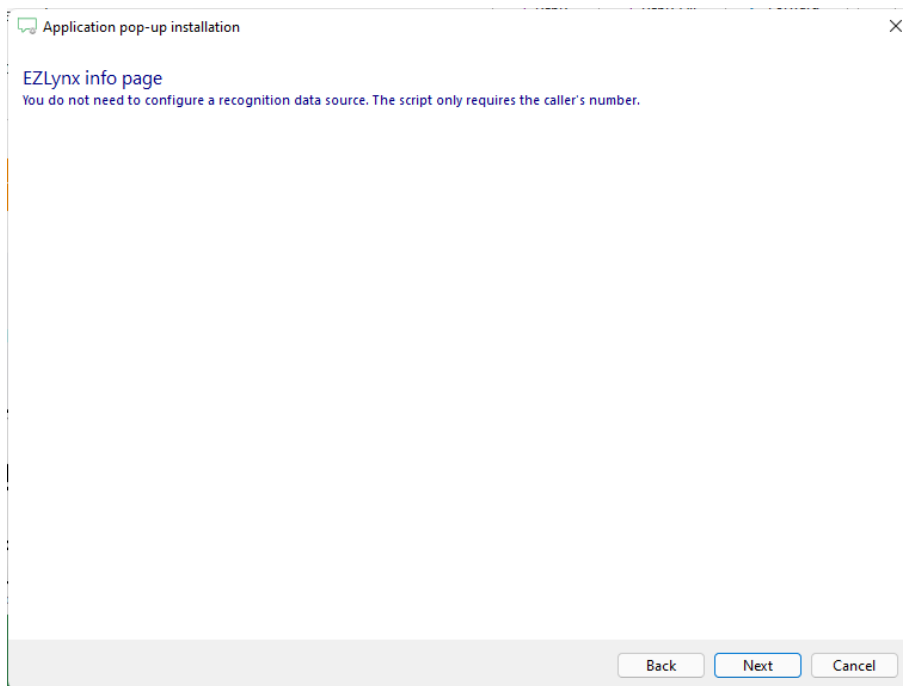
For outbound dialing, highlight a phone number and press the dial hotkey.

Configuraton steps

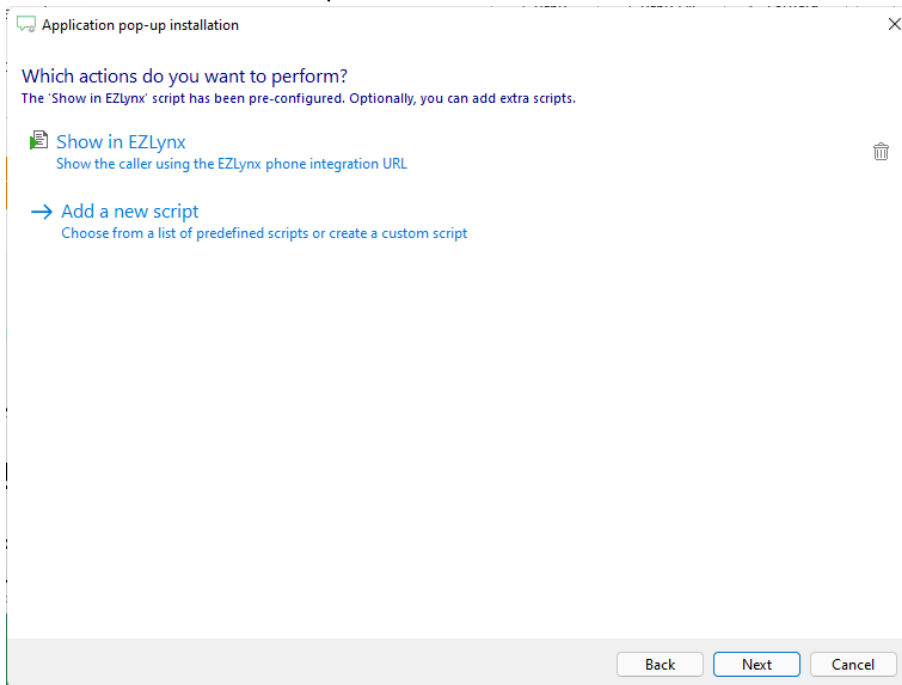
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose EZLynx, as shown below.



- 2) The integration works with only the caller's number and therefore does not require any recognition. Click 'next' to continue.



- 3) You can add additional scripts or click 'next' to continue.



- 4) Check the configuration summary and click 'Finish' to add the integration with the application.

