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Welcome to Summary Reports


Summary Reports provide key information at a glance, and include tools for getting the most from their data.

Report Basics

ACCESS REPORTS

A user must have the appropriate permission to access reports. Need report access? Contact support@ezlynx.com.


To access reports:

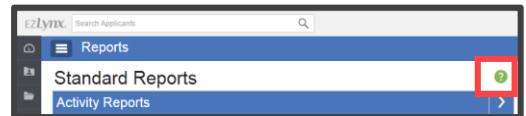
- Click the reports icon; located on the left side of all EZLynx pages 
 - Each report category can be expanded and collapsed by clicking the report category or the arrow on the right

LOCATE A REPORT

To help users locate and understand individual reports, there is a guide to assist with each report.

To view a report's guide:

- Click the *blue?* icon at the top right corner of any report 
- Or, click the *green?* icon at the right of the Standard Reports list



DOWNLOAD OR PRINT A REPORT

Every report has icons at the upper right, used to download or print the report.

- **Down arrow icon** = export to a CVS, Excel or PDF file
- **Printer icon** = opens a printer friendly version of the report in a new tab; use a browser to send the report to the desired printer



EZTIP: Summary reports cannot be saved.



Summary Reports Guide

Report Features

Summary reports have several unique features to help you get the most actionable information possible.

SORT

All table columns can easily be sorted by clicking the column header.

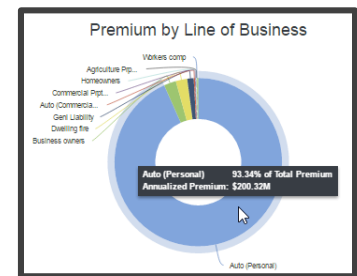
- Click any column header
- To sort in the other direction, click header again

Line of Business	Number of Customers	Number of Policies	Annualized Premium
Auto (Personal)	151	402	\$200,323,060.30
Auto (Commercial)	80	129	\$543,534.34
Homeowners	35	60	\$291,066.48
Commercial Prpty	27	35	\$326,322.67
Workers comp	24	38	\$84,672.58
Business owners	19	38	\$5,000,238.75
Genl Liability	18	25	\$2,642,669.66
Agriculture Pkg	17	25	\$63,768.99
Dwelling fire	17	25	\$4,772,930.28
Inland marine (comm)	12	15	\$24,493.00
Agriculture Prpty	10	11	\$100,840.61
Annuity Indexed	10	11	\$20,597.84

HOVER TEXT

Hovering over any chart data opens a box with more detailed information.

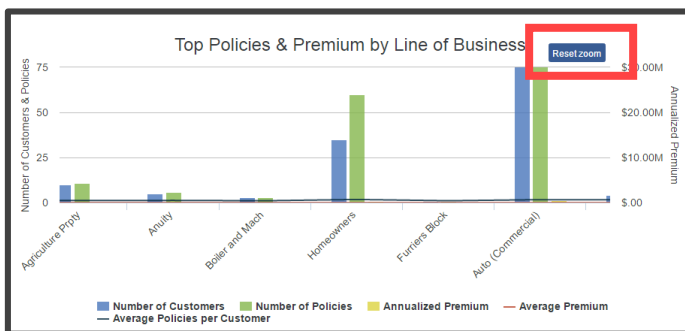
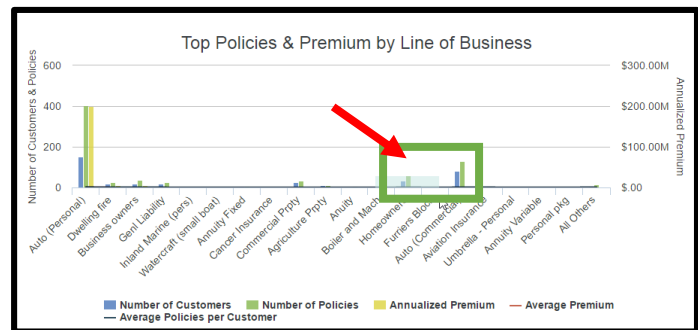
- Place the cursor over the any chart data that you would like to learn more about – a box with additional information opens



ZOOM

Certain charts provide a “zoom” feature for viewing data in more detail.

- To zoom, click the chart and drag – the selected area is then shaded light green
- Release the mouse when the desired area is highlighted
- To return the chart to its original appearance, click *Reset Zoom* at the upper right





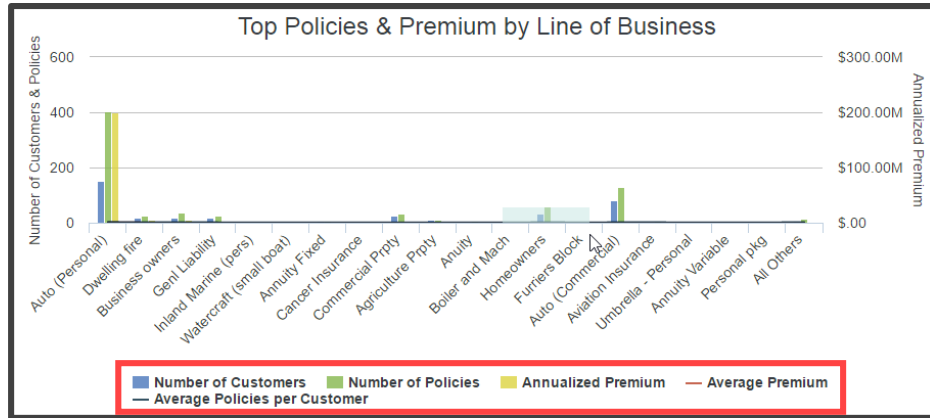
Summary Reports Guide

CHART CUSTOMIZATIONS

Certain charts can be customized to show or hide data as needed.

To show or hide data:

- Click the label of the item to show or hide
 - Clicking the label toggles the visibility



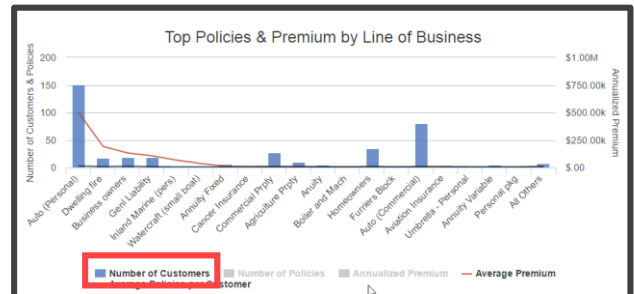
Here is an example scenario:

Let's hide all but Average Premium and Average Policies per Customer

- Click these labels: *Number of Customers*, *Number of Policies* and *Annualized Premium*; chart no longer displays these items and labels appear faded.



- Next, click *Number of Customers* label to return this item to the chart's view. *Number of Policies* and *Annualized Premium* labels remain faded and items are still not displayed in the chart.



Questions? Contact support@ezlynx.com