



# How to ensure your agency is benefiting from Ivans complimentary tools

## Set up your agency in Ivans Exchange

Ivans provides agents with complimentary tools that assist them in knowing more about their download, finding a commercial market, and rolling a book of business.

Access to this functionality is through Ivans Exchange, a complimentary online tool for independent insurance agencies.

Ivans Exchange offers agents a comprehensive view of current and potential download activity through the Ivans network. This provides agents with a tool to increase carrier connections to drive higher agent productivity and better service for insureds.

The checklist below will help guide you through ensuring that your agency is taking full advantage of your download coming through the Ivans Network and other complimentary tools in Ivans Exchange. If you have any questions, please contact the Ivans Agency Customer Success team at [Connections@Ivans.com](mailto:Connections@Ivans.com).



## About Ivans

Ivans is where insurance carriers, agents, and MGAs come together to grow their businesses. Every day, our 34,000 agents and 450 carrier partners plug into technology that empowers them to better determine appetite and eligibility, swiftly produce quotes, get accurate claims and commission updates, automatically communicate policy data, and connect to one another to drive new business. With easier ways to get the day's work done, insurance professionals can open the door to more revenue without letting complexity in behind it.

## 1. Go to [Exchange.ivansinsurance.com](https://Exchange.ivansinsurance.com)

Log in with your agency's credentials or click on the icon in your agency management system. If you are not sure how to do so, contact [Connections@ivans.com](mailto:Connections@ivans.com)

## 2. Once you are logged in

There are tabs and a menu of options to assist your agency. Knowledge of what is going on through the Ivans Network may enhance the data processed by your agency's management system.

**Resend** – You may want to use this tab to investigate if a policy downloaded through the Ivans Network did not make it to your agency management system. Why would this happen? Sometimes data coming from your carrier or MGA does not match the process established for processing the download in your agency management system. Use the Resend tab to investigate if the policy was downloaded to Ivans.

- If the policy is downloaded, you may resend it to your agency management system. The next time your system picks up your download, the file will be available. NOTE: it did not process as expected the first time your system attempted to pick it up. You may need to do something to process it the second time; your agency management support team may assist you with this.
- If the policy did not download, please contact your carrier or MGA. If you wrote a policy and the download did not come through the Ivans network, something has not been setup correctly to download the policy or business transactions through Ivans.

**Dashboard** – this provides a graphical view of the download coming through the Ivans network.

- The transactions your agency received in the past twelve months by line of business or business transactions.
- Available Connections Pie Chart – If you see “Blue” on your pie chart, you have potentially available download. A carrier or MGA may have added new business transactions or lines of business. To learn more, go to the “Connections” tab.

**Connections** – this is your agency's grid that contains the list of carriers and MGAs providing your agency with download through the Ivans Network. Your goal is to act on any “A” = potentially available download connections.

- To do so, go to the row with the carrier or MGA that contains an “A.” Click on the carrier or MGAs name to review the note provided through the hyperlink information.

1. If there is a note, follow those instructions.
  2. If no instructions are provided under the notes, click on the “A”. If you want to receive this line of business download from this carrier and indicate that you “Want” the download. This will replace the “A” with a “W” and Ivans will assist you with the process of activating your download. In the future, you may see a “SC” in the box. That means that your download is pending your agency writing that type of business with the carrier that initiates the download transaction through the Ivans network.
- If you do not see one of the carriers or MGAs that you write policies with listed on your Ivans Connection report, email [Connections@Ivans.com](mailto:Connections@Ivans.com) to learn if download through the Ivans Network is available.
  - NOTE: To ensure that you are reminded to review your Connections report monthly, click on the alarm clock at the top of the legend on the right to set up your notifications.

**Feedback** – This tab provides a status on your codes. NOTE: Once download comes through the network, it will automatically replace any of the manual codes that you may have entered on your Connection Report.

### 3. Access the Menu

To access the menu, click on the three horizontal lines in the upper right corner of the page

**Dashboard & Connections** (or Home, depending on your Agency Profile permissions) - returns you to the main screen with the Resend, Dashboard, Connections, and Feedback tabs

**Reports** - provides list of trading partners with ability to export

**Ivans Market Manager** (only available if you are an agency administrator that has Use Market Appetite permission enabled) - links to the Ivans Market Appetite website from within Ivans Exchange

**Help** - provides a link to the Ivans Exchange Agency Help File and links to helpful videos.

If at any time you have a question, reach out to the Ivans Customer Success team at [Connections@Ivans.com](mailto:Connections@Ivans.com)