InsurancePro™
The Agency Management Software

IVANS Setup Guide

Insurance Technologies Corporation partners with IVANS, a leading provider of agency-company interface solutions. This document will provide instruction on downloading and installing IVANS' Transfer Manager.Net and setting up InsurancePro to receive downloads from your carriers that utilize IVANS' technology.

Table of Contents

Overview

InsurancePro has a built-in feature to process policy transactions downloaded from your carriers. This feature automatically updates your customer database with detailed information about new business, renewals, endorsements and cancellations.

InsurancePro accepts files in ACORD AL3 format. There are three methods used to transfer policy transactions in ACORD AL3 format from the carrier to InsurancePro - FTP, Team-Up, and IVANS. An FTP download is a direct download from the carrier to your computer. Team-Up and IVANS are third-party vendors that offer agency-company interface solutions. This document will cover the process of setting up the IVANS Transfer-Manager.NET method.

For a list of companies certified to download into InsurancePro and the method each use, visit us at http://www.insurancetechnologiescorp.com/Products/Management/certified_company_list.aspx.

Carriers download policy transactions to an electronic mailbox hosted by IVANS that is dedicated specifically for your agency. Then on a periodic basis, you will run a download process in InsurancePro. The download process retrieves your policy transactions from your IVANS mailbox and downloads them into the `C:\AIdown` folder on your computer. During that process, InsurancePro matches the downloaded policy transactions to existing clients in InsurancePro by the insured's policy number and/or client name. Once you verify the policy transactions have been matched correctly, you will import them into InsurancePro. An illustration of this process is shown below in Figure 1.

Figure 1: IVANS Download Process
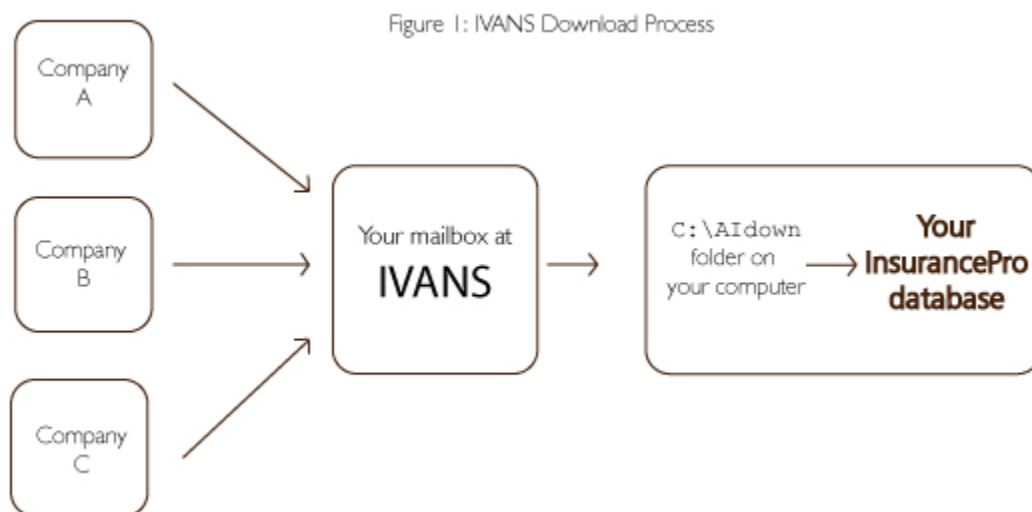
We recommend you only use one computer to process your IVANS downloads.

> ⊗ InsurancePro will attempt to match the policy transactions to the appropriate carrier in InsurancePro by the carrier's NAIC code. It is imperative all of the NAIC codes for your carriers are entered into InsurancePro **PRIOR** to doing your first download.

🛑 STEP 1: Enter NAIC Codes in InsurancePro for all of your carriers

Enter NAIC codes for all companies. In InsurancePro, under "Agency Settings", click on "Insurance Companies".
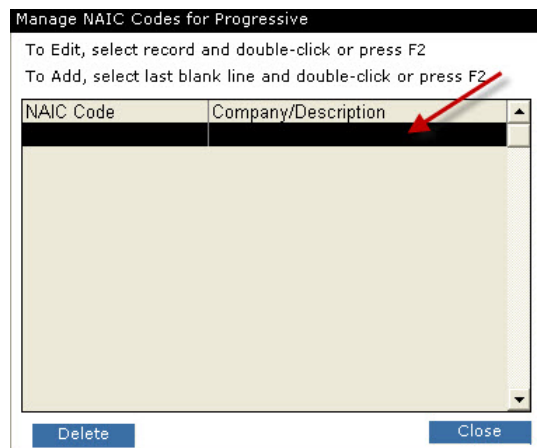

Select a company by clicking on their name once and then click on "Setup NAIC Codes".
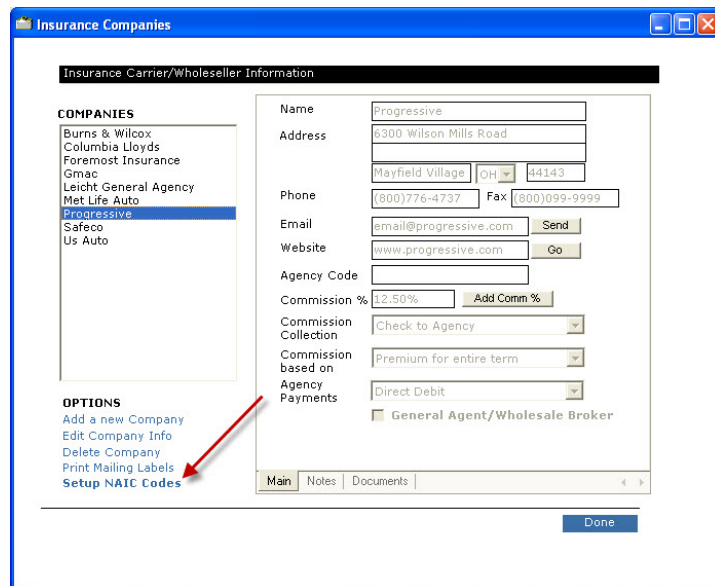
To enter an NAIC code, double click on the black line under NAIC code heading and enter the NAIC code. Then double click under Company/Description heading to enter the company name. Press "Close" when done.

Repeat this process for each company.

A list of NAIC codes by company can be found by visiting us at http://www.insurancetechnologiescorp.com/Products/Management/certified_company_list.aspx.

STEP 2: Get a mailbox account with IVANS and notify carriers

To get a mailbox account with IVANS, contact one of your carriers that currently download through IVANS. The carrier will submit your agency information to IVANS who in turn will set up a mailbox specifically for your agency. You will be provided with your IVANS Y account and User ID. This identifies your mailbox with IVANS.

All of your carriers that download through IVANS will use this mailbox. After you receive your Y account and User ID, you will want to provide that information to the remaining carriers that support IVANS downloads.

For a list of carriers certified to download into InsurancePro and the method they use, visit us at: http://www.insurancetechnologiescorp.com/Products/Management/certified_company_list.aspx.

STEP 3: Install IVANS Transfer Manager.NET

Download. To install IVANS' Transfer Manager.Net, go to:

http://support.turborater.com

Scroll to the bottom. Under the header "InsurancePro Agency Management" click on "Download setup for IVANS Transfer Manager.Net"

InsurancePro Agency Management

NEW InsurancePro Online Knowledgebase

NEW Training Videos

NEW How to features documents

InsurancePro System Specifications

Online Help File for Version 5.25 | Version 6.00

Companies Certified to Download with InsurancePro

Carrier Download Setup Documentation

Download setup for IVANS Transfer Manager .Net
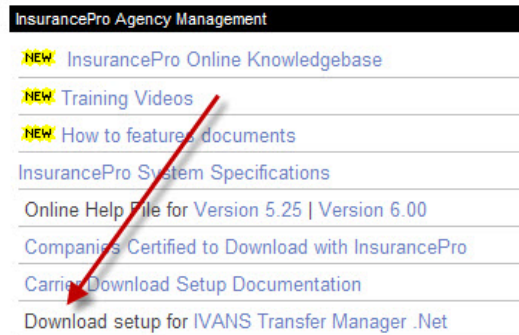
**Choose Run or Save.** Choose **Run** to start the installation immediately.

If the Run option is not available, choose **Save** to download the installation program to your desktop. After the download is complete, go to your desktop and click on the icon labeled "IVANSTMNET" to run the installation program.

File Download - Security Warning

Do you want to run or save this file?

Name: IVANSTMNET3.4.0.0.exe
Type: Application, 37.4MB
From: www.ivans.com

Run   Save   Cancel

While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

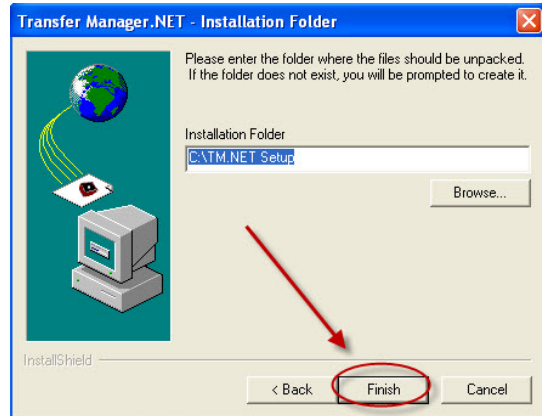**Security Warning.** If prompted by a Security Warning, select "Run".

Transfer Manager.NET – Welcome. Select "Next" on the Welcome screen.
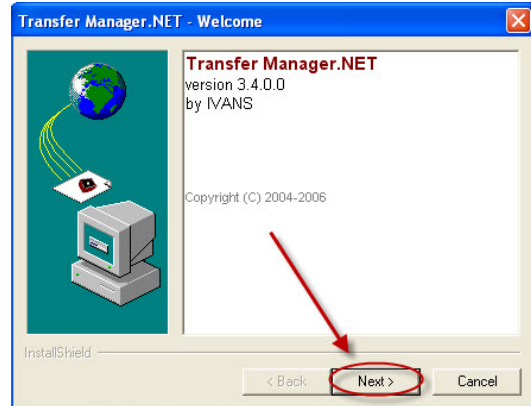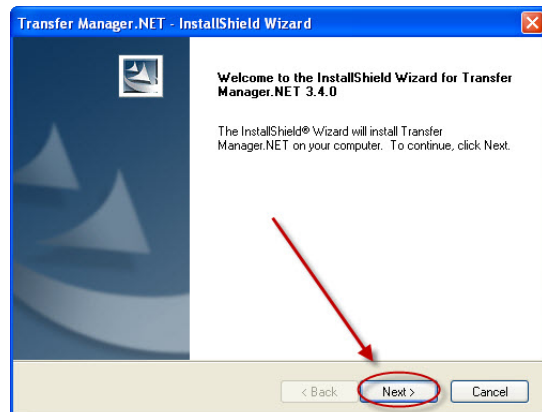
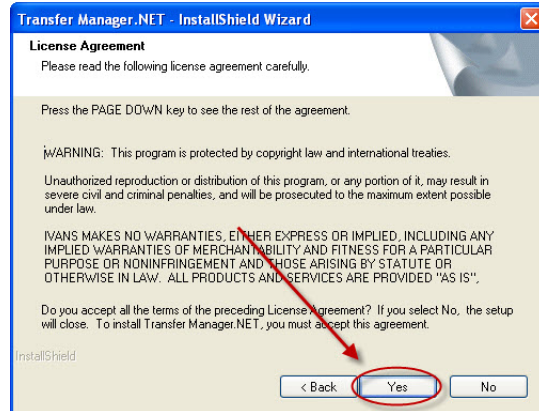**Installation Folder.** We highly recommend leaving the installation folder set to the default path of `C:\TM.NET Setup`.
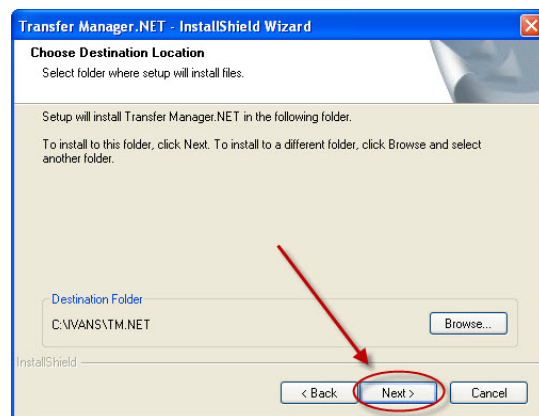
Select "Finish" on this screen to continue.

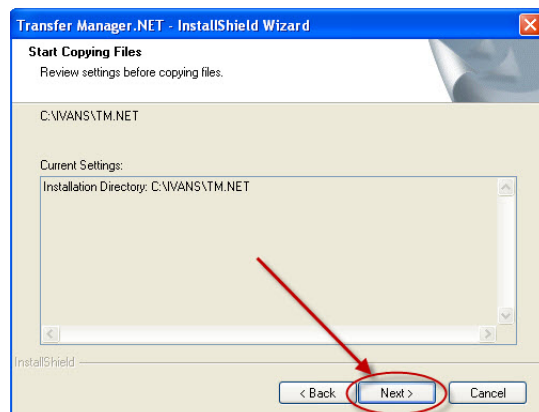**InstallShield Wizard.** Click "Next" to continue.

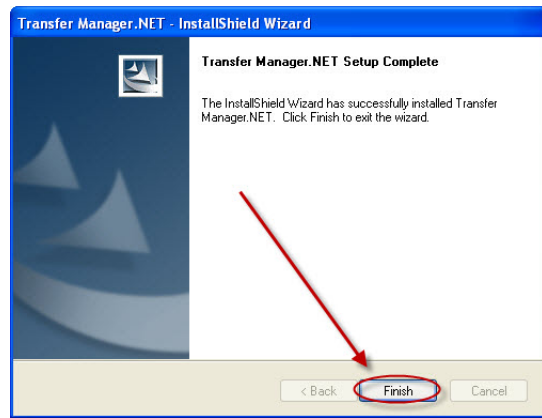**License Agreement.** After reviewing the License Agreement, select "Yes" to continue.

Choose Destination Location. We highly recommend leaving the Destination Folder set to `C:\IVANS\TM.NET`. Select "Next" to accept.

Start Copying Files. Select "Next" to start copying files.

Transfer Manager.NET Setup Complete.
Select "Finish".

STEP 4: Configure IVANS Transfer Manager.NET

Open Transfer Manager.Net by going to "Start", "All Programs" and clicking on "Transfer Manager.NET".
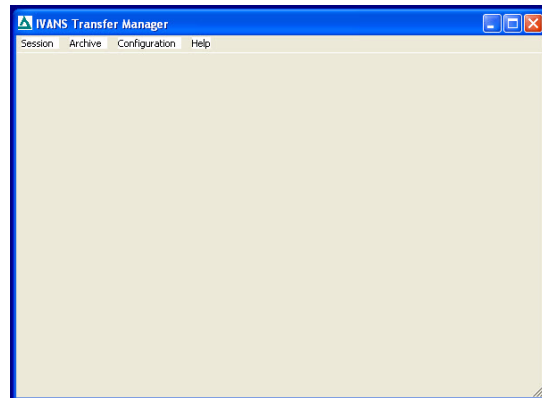
Click on "Configuration" then "Support Mode".
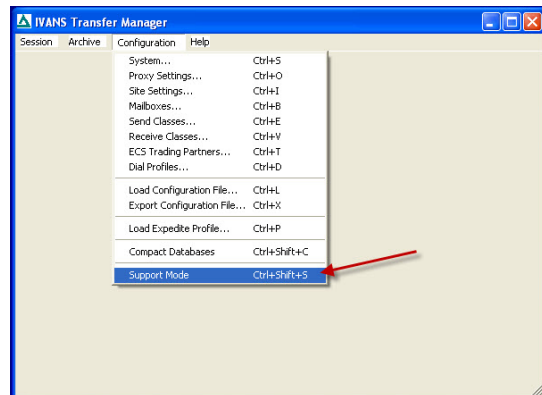
Click on "Configuration" then "Mailboxes".
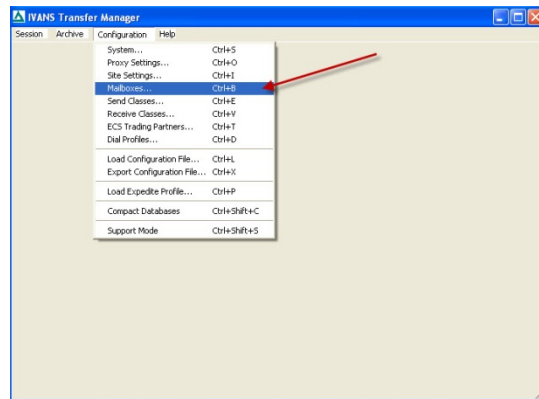
Click on "Add…" to add your mailbox information.
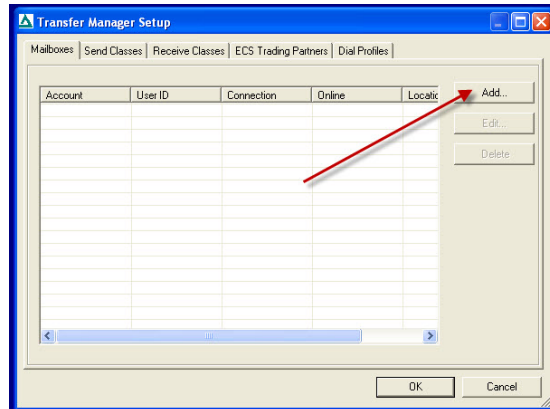
Enter your mailbox information that was provided by IVANS.

Account:	Enter your Y account number
User ID:	Enter your User ID (yx number)
Mailbox Password:	Your mailbox password is also your User ID (yx number)
Confirm Password:	Enter your User ID again (yx number)
Location:	Choose "IVANS ECS Internet"
Online:	Check the box for Online
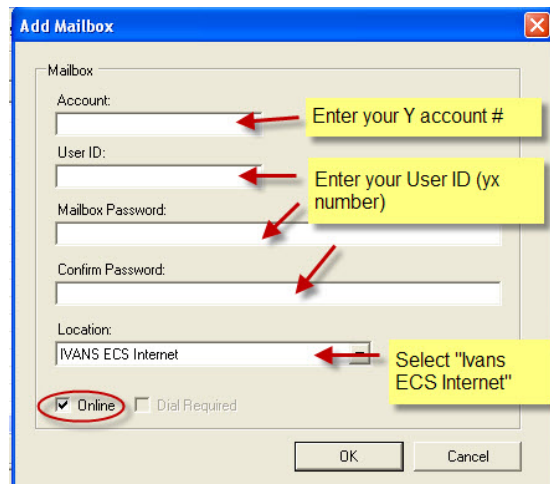
Click "OK" when done.

Note: If you do not have an IVANS mailbox number, refer to Step 2 in this guide.

Note: If you are unable to select "IVANS ECS Internet", refer to "Configure IVANS ECS Internet location" in Appendix C.

Transfer Manager.NET Setup complete. Click "Ok" to complete the Transfer Manager.NET setup.
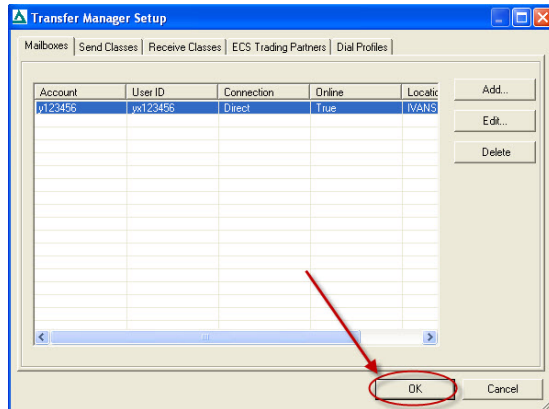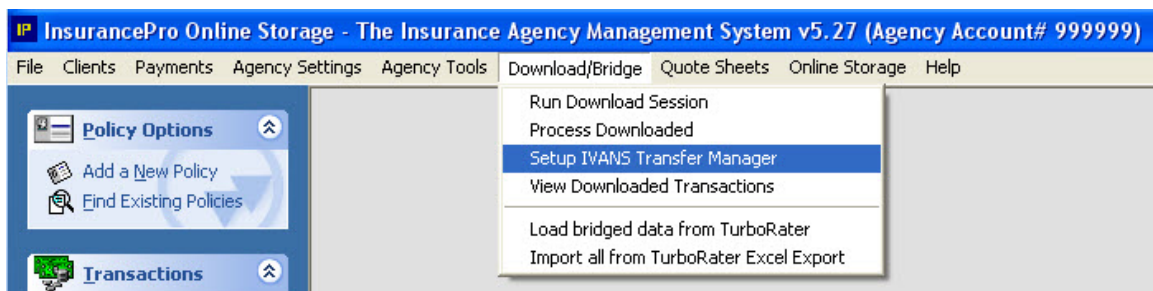

Close Transfer Manager.NET. Click on "Session" then "Exit" to close Transfer Manager.NET
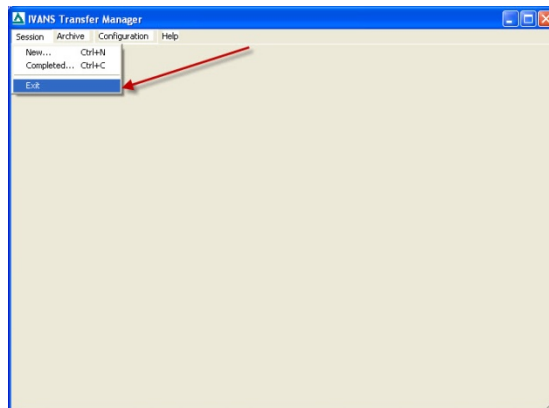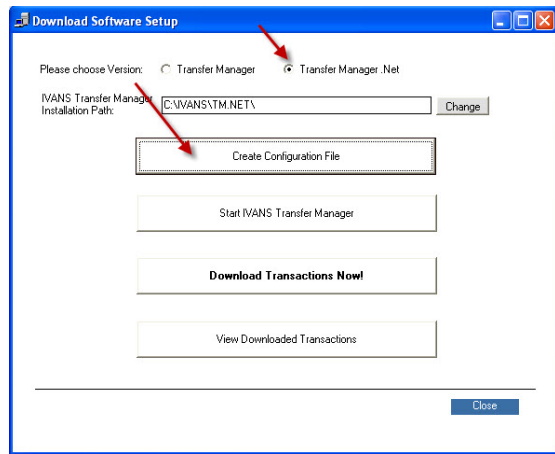

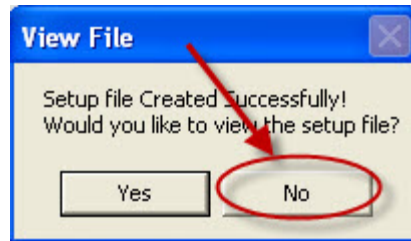## STEP 5: Set Up InsurancePro for IVANS Downloads

Setup IVANS Transfer Manager. Open InsurancePro. From the "Download/Bridge" menu, select "Setup IVANS Transfer Manager".
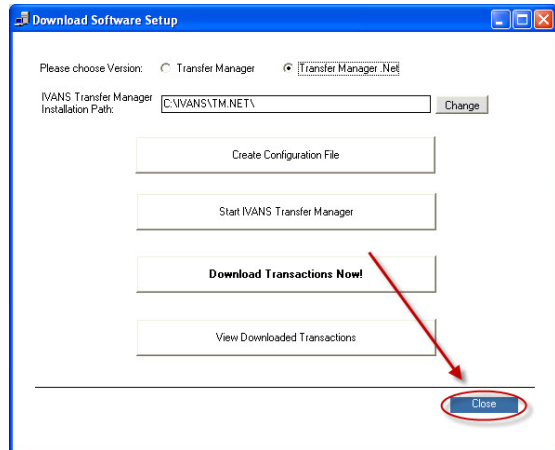
Create Configuration File. Select "Transfer Manager.Net" and then click on "Create Configuration File".

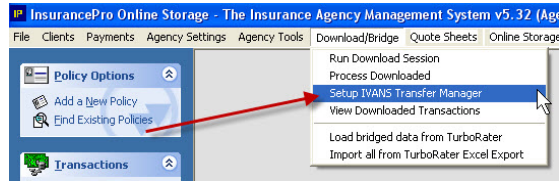**View File.** Select "No" as you will not need to view the file.
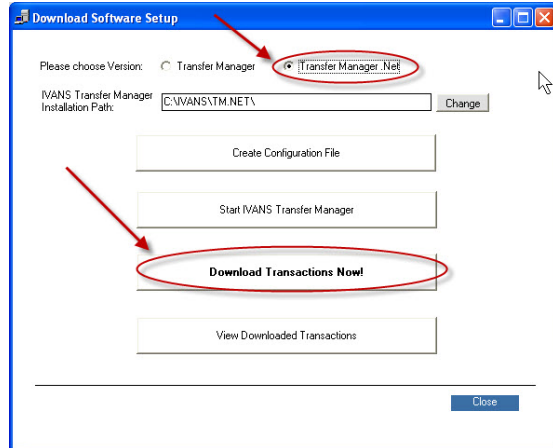
Click close.

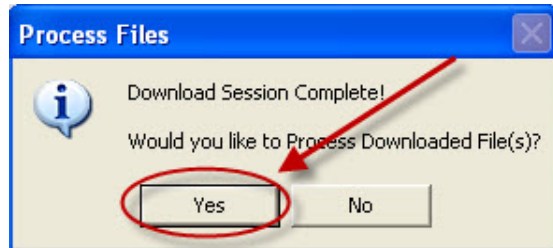## STEP 6: Download and Process Policy Transactions

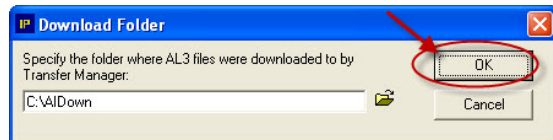**Setup IVANS Transfer Manager.** On the "Download/Bridge" menu, select "Setup IVANS Transfer Manager."

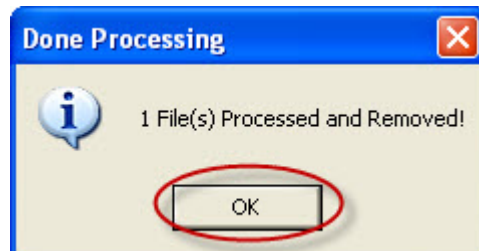**Please choose Version.** Select "Transfer Manager.Net" and click on "Download Transactions Now!".

Download Session Complete. Select "Yes" to process downloaded files.

Download Folder. Select "OK" to accept C:\AIDown as the download folder.

Done Processing. Select "OK".

Processing the Downloaded Transactions.

InsurancePro automatically matches the downloaded policy transactions to existing clients in InsurancePro by matching the policy number and/or client name. If a match is not found, you have the ability to manually associate the policy transaction to an existing customer. Otherwise, InsurancePro will create a new policy for any unmatched transactions.

To view transactions that were not matched with existing policies, click on "Auto Select". All transactions that were not matched will be unchecked.
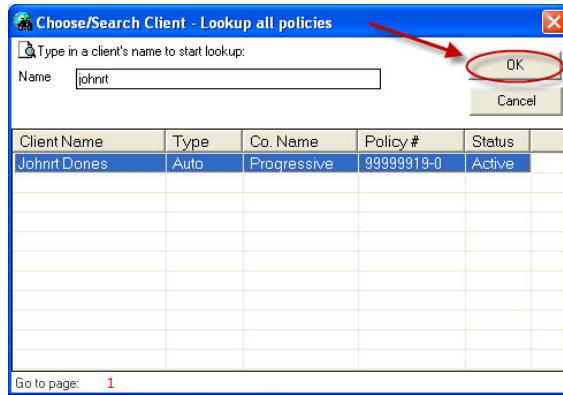

To match the policy transactions that are unchecked, click on the client's name. The name will convert to a menu as shown below.

By clicking on the box to the right of the name, the "Choose/Search Client – Lookup all policies" box will appear. Search for the correct client, highlight their name when you locate their file, and click "OK".

Once you have completed, click on "Upload Selected in to InsurancePro" button to process the selected transactions and upload them in to InsurancePro.

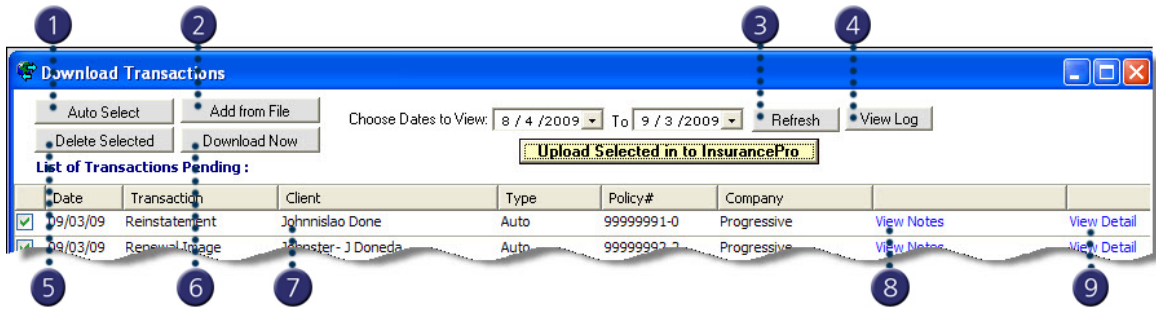**Note: Selecting "Upload Selected in to InsurancePro" will incorporate the policy transactions into your InsurancePro database. This process cannot be undone.**
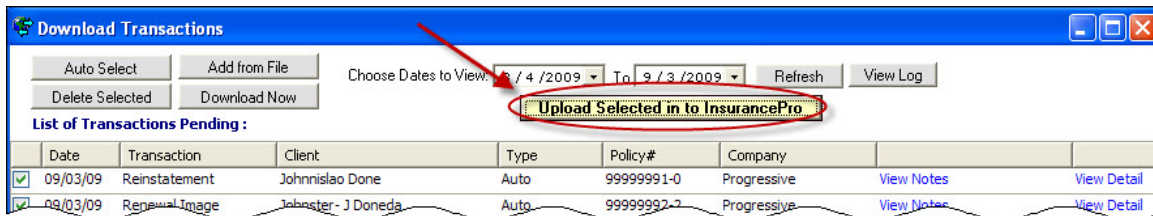
For a full explanation of the Download Transaction screen, see Appendix C.

Appendix A: Description of the Download Transactions Page

1   **Auto Select:** Clicking on Auto Select will de-select all policy transactions that have not been matched up to an existing insured in InsurancePro. If these transactions are not matched up manually, they will be added as new entries in the database.

2   **Add from File:** To manually specify and process transactions from a single AL3 file.

3   **Refresh:** Will update the list of transactions downloaded between the chosen dates.

4   **View Log:** Displays a log of all the transactions downloaded between the chosen dates. This is helpful when troubleshooting.

5   **Delete Selected:** This will delete the selected transactions. Deleted transactions will not be uploaded into InsurancePro.

6   **Download Now:** Starts the IVANS Transfer Manager program and runs a download session.

7   **Client:** By clicking on the box to the right of the name, the "Choose/Search Client – Lookup all policies" box will appear. Search for the correct client, highlight their name when you locate their file, and click "OK".

8   **View Notes:** Displays the notes, if any, associated with the transaction.

9   **View Detail:** Displays a detailed summary document of the downloaded transaction.

Appendix B: How to View a Detailed History of Downloaded Transactions

InsurancePro will save a detailed summary document in about the downloaded transaction in the client's file. This can be viewed and/or printed by clicking on "Print Forms/Letters" in the Policy Summary Screen.
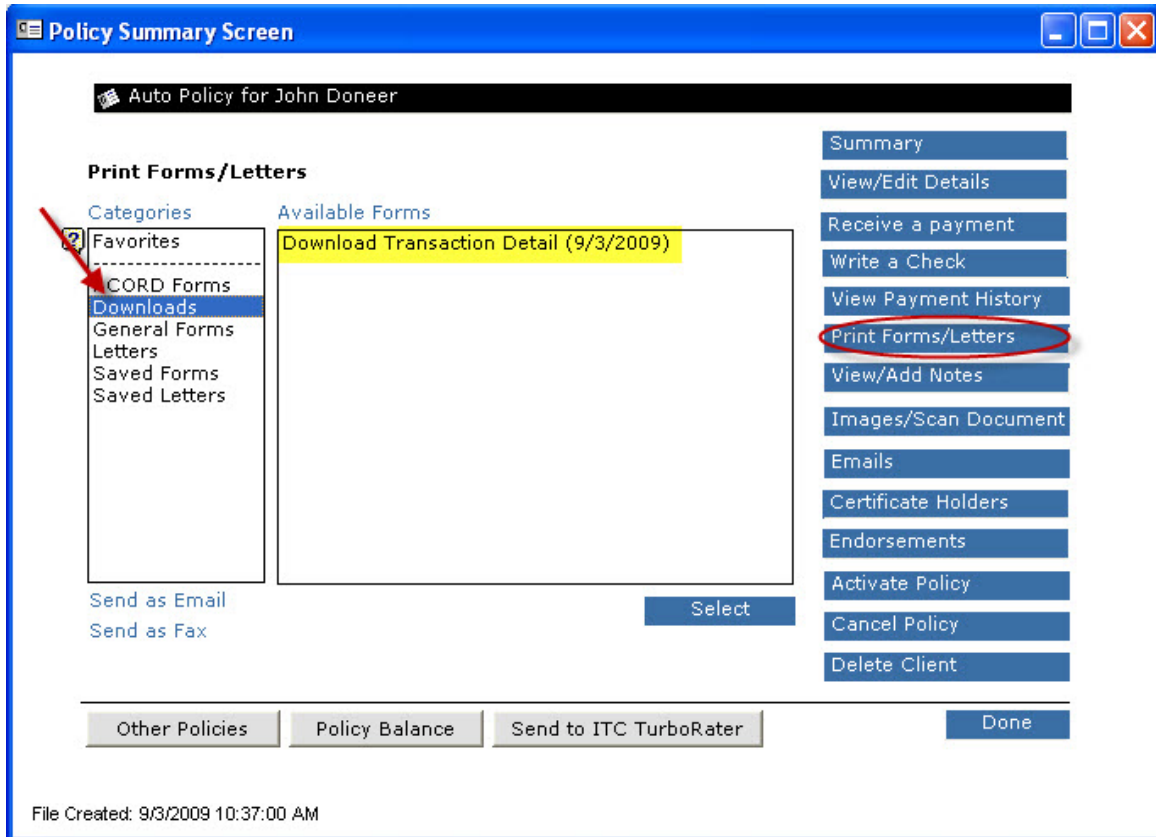
Click on "Download Transaction Detail" to view a Policy / Download Transaction Summary View. An example is provided on the next page.

InsurancePro

Policy / Download Transaction Summary View

Insured	**Insurance Agency**
John Doneer	Sb Insurance Agency
1234 East 9th St	5454 Test
Saugus, CA, 91350	Dallas, TX, 75214
(661)297-7074	Phone: (321)321-3211
	Fax: (123)123-1232

Policy Information

Company:	Progressive	Effective Date:	9/12/2002
Policy Number:	99999996-0	Expiration Date:	3/12/2003

Drivers

Name	DOB	Sex	Mrd	DL#	State	SSN#	Relation
John Doneer	12/21/1976	M	S	B9999999	CA		Insured

Vehicles

Year	Make	Model	VIN	Comp	Coll	Rental	Towing
2001	Ford	Mustang #8 Cp	9FAFP99V999999999	500	500		
1996	Toyot	Avalon XI/x4d	9T9BF999999999999	500	500		

Coverages	Limits
Liability - Bodily Injury	250/500
Liability - Property Damage	100
Uninsured/Underinsured Liability	
Uninsured/Underinsured Property	3

Total Premium	**$2,020.80**

Transaction Notes:
THE FOLLOWING CHANGES WERE REQUESTED BY RYAN PARKER ON 11/14/02 AND ARE EFFECTIVE ON 10/30/02: PLEASE REVIEW FOR POLICY CHANGES. DOLLAR AMOUNT NET CHANGE PREM $ = 0346.00-

Downloaded Transaction Details	Endorsement/Change Details
Transaction ID: 3792	Endorsement Effective Date: 10/30/2002
Transaction Code: PCH	Endorsement Premium: -$346.00
Transaction Type: Policy Change	Download Date: 9/2/2009
Co. NAIC Code: 27804	

Description: All the client's detailed information in the Downloaded Transaction will either be Synchronized with an existing entry or entered as a new policy in the Database.

Date Document Created: 9/3/2009 10:37:16 AM

Appendix C: Transactions and Policy Types Processed by InsurancePro

The following is a list of policy transactions InsurancePro processes:

- New Business – added as a new policy
- Policy Change – updates the policy details for existing customer and adds an endorsement to the policy
- Reinstatements – added as a renewed policy
- Rewrite – added as a renewed policy
- Renewal Image – added as a renewed policy
- Data Base Synchronization – added as a new policy
- Cancellation Confirmation – updates the policy status to cancelled
- Print/Memo Transactions - a notice or a report sent by the company

Note: There might be cases when unsupported transaction types are downloaded, such as "Renewal Quotes". These transaction types will not be processed. The transactions are identified as "Not Supported" Download Transaction screen for your reference though.

For a complete list of transactions and their functions, visit us at
http://support.turborater.com/IPHelp.Net/Transaction_Description.htm

Appendix D: Accessing your IVANS Mailbox

To access your IVANS mailbox, you can visit IVANS' site at:
https://ecsint.ivans.com/ECSG2/LogonMain/Welcome1.asp

This is particularly helpful when trying to troubleshoot IVANS download problems. Within this site you can:
- View the last date and time a carrier downloaded to your IVANS mailbox
- View the last date and time you downloaded from your IVANS mailbox
- View the files in your Inbox
- View session histories
- Identify what carriers are signed up with IVANS to download to your mailbox

Remember, your Y account is your Account number. Your User ID and Password is your YXnumber.

Appendix E: Troubleshooting

Configure IVANS ECS Internet location

If you are unable to select "IVANS ECS Internet", under the "Configuration" menu click on "Site Settings".
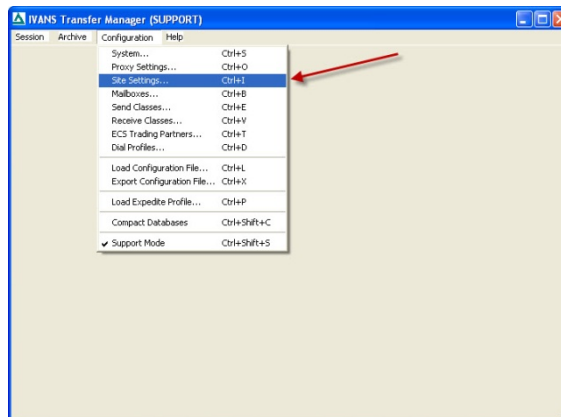
Select "IVANS ECS Internet" under Select the site for connecting to ECS and select "Information Exchange Internet" under Select the site for connecting to IE. Then click "OK". Return to Step 4 to complete the IVANS mailbox configuration.
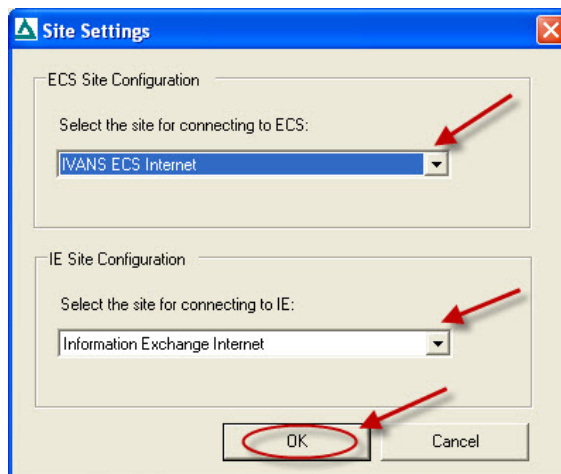
Additional InsurancePro Training Materials

Online training videos - http://support.turborater.com/IPVideos.asp

Online Help file - http://support.turborater.com/IPHelp/IPhelp.htm

Online Knowledgebase - http://www.itcdataservices.com/support/IPFAQ/afmmain.aspx

Companies Certified to Download with InsurancePro - http://www.insurancetechnologiescorp.com/Products/Management/certified_company_list.aspx.

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