



# How to Use Ivans Exchange

## What Is Ivans Exchange?

Ivans Exchange™ is a free online tool that simplifies your daily operations. It helps you track existing and new download connections, allowing agencies like yours to build strong connections with carriers and MGAs while improving productivity. Ivans Exchange provides clear visibility of your download activities in our extensive Network.

Our dashboard lets you easily monitor your agency's download activity and communicate directly with carriers for valuable feedback on quality and preferred connections. You'll also benefit from an automated workflow that streamlines book roll transfers and provides insights into commercial appetite through Ask Kodiak®. Imagine connecting with more carriers, boosting your efficiency, and providing excellent service to your clients — all accessible at your fingertips!

## Getting Started with Ivans Exchange

### 1. Identify Your Ivans Y-Account

To begin using Ivans Exchange, you must have an Ivans account, known as a "Y-Account." If you are unsure of your Ivans Y-Account details or do not possess one, email us at [Connections@Ivans.com](mailto:Connections@Ivans.com).

### 2. Log into Ivans Exchange

Log in with your agency's credentials at [exchange.ivans.com](https://exchange.ivans.com) or click the icon in your agency management system. If you need help, email us at [Connections@Ivans.com](mailto:Connections@Ivans.com).



## About Ivans

Ivans® is where insurance carriers, agents, and MGAs merge to grow their businesses. Every day, our 38,000 agents and 700+ 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 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.

### 3. Navigating the Home Screen

There are four tabs, as indicated below, and a menu of options to access more services. 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 the Resend tab to investigate if a policy downloaded into the Ivans Network did not make it to your agency management system. Why would this happen? Sometimes, data from your carrier does not match the process established for matching in your agency management system. Use the Resend tab to investigate if the policy was downloaded to Ivans.

- If the policy is found in the Ivans Network, you may resend it to your agency management system. The file will be available the next time your system picks up your download.

**Note:** If 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 into the Ivans Network, please contact your carrier. If you wrote a policy and the download did not come through the Ivans Network, something has not been set up correctly to download the policy or business transactions through Ivans.

**Watch this video** to see Single Policy Resend in action.

#### Dashboard

The Dashboard tab provides a graphical view of the download coming through the Ivans Network.

- The transactions your agency received in the past 12 months by line of business or business transactions.
- Available Connections pie chart — If you see “Blue” on your pie chart, you have potentially available downloads. A carrier may have added new business transactions or lines of business. To learn more, go to the “Connections” tab.

## Connections

The Connections tab is a grid that contains the list of carriers providing your agency with downloads through the Ivans Network. Your goal is to act on any “A” (Available) download connections.

1. Go to the row with the carrier that contains an “A” indicating available. Click the carrier’s name to review the note provided using the hyperlink information.

- a. If there is a note, follow the instructions.
- b. If no instructions are provided under the notes, click “A.” If you want to receive this line of business download from this carrier, indicate that you “Want” the download. This will replace the “A” with a “W,” and Ivans will assist you in activating your download. In the future, you may see an “SC” in the box. That means your download is pending your agency writing that type of business with the carrier initiating the download transaction through the Ivans Network.

**Note:** You must be appointed to write policies for your carrier. Although you see an “A,” you need to confirm through your producer contract that you may write the line of business in your state.

- c. If you do not see one of the carriers you write policies with listed on your Ivans Connection Report,
  - i. Click the [Ivans Carrier Partners Reference Guide](#).
  - ii. Contact [Connections@Ivans.com](mailto:Connections@Ivans.com) to learn if downloading through the Ivans Network is available.

**Tip:** To ensure you are reminded to review your Connections report monthly, click the alarm clock at the top of the legend on the right to set up your notifications.

## Feedback

The Feedback tab provides a status on your codes.

**Note:** Once your download comes through the Network, it will automatically replace any of the manual codes you entered on your Connection Report.

## 4. Access the Menu

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

- **Home** returns you to the main screen with the Resend, Dashboard, Connections, and Feedback tabs.
- **Mailbox** allows you to search your Inbox to research your download. The information is available for up to 120 days.
- **Reports** provide a list of trading partners with the ability to export.
- **Market Appetite (powered by Ask Kodiak)** is a free tool that will assist you with finding a commercial lines market.
- **Agency Profile** provides information on your agency, management system, users, carriers and codes.
- **Help** provides a link to the Ivans Exchange Agency Help File and links to helpful videos.
- **Bookroll** is used when working with a carrier to roll a book of business.
- **Groups** are used when managing more than one Ivans Y-Account.

Check out the [Ivans Exchange Product Hub](#) for the latest updates, news, and product information.