



**FREEDOM**  
— COMPANIES —

# **AGENCY DOWNLOAD MANUAL**

**Personal Auto**

**September 2010**

## **INTRODUCTION**

The Freedom Companies would like to thank you for agreeing to participate in our new Agency Download program. Our download partnership will prove to be beneficial to both your agency and our company, as our databases will contain policy information that mirrors each other.

If you have any questions before we start downloading on a daily basis, or at any point after the process is activated, please call or e-mail your Freedom Marketing representative:

**Allison Shields**  
**Email:** ashields@freedomgeneral.com  
**Phone:** 888-542-4222 x 8407  
**Fax:** (866) 324-0987

## **ABOUT THIS DOCUMENT**

This document outlines the necessary procedures to set up your agency management system to receive download information from the Freedom Companies. Since procedures vary with different vendor systems, you will need to refer to your agency management system documentation for the specific information required to complete the setup screens. **THIS SETUP MUST BE COMPLETED BEFORE FREEDOM CAN START DOWNLOADING TO YOUR AGENCY.**

## **LINES OF BUSINESS/TRANSACTIONS RECEIVED THROUGH DOWNLOAD**

Freedom will be downloading the Personal Auto line of business only. The types of transactions that will be downloaded are:

1. New business
2. Re-writes
3. Renewals
4. Endorsements
5. Cancellations
6. Reinstatements

NOTE: Non-renewals will not be downloaded. Coverage rescissions will be downloaded as cancellations.

## **POLICY NUMBERS**

Freedom's personal auto policy numbers contain 9 alpha-numeric characters, with no spaces (3 character prefix + 6 digits. For example: ABC123456). If your agency management system currently stores Freedom policy numbers in a different format, you must update them in order for the download to find a match.

## **AGENCY MANAGEMENT SYSTEMS**

Freedom currently downloads to the following Agency Management Systems:  
**Hawksoft, InStar, Applied (TAM, Vision, DORIS, Epic), Quomation PowerManage, Ebix ASP, FSC Manager, ITC Insurance Pro, Insure Now \***

(\*) NOTE: Indicated systems are in the process of certification, and will be in production shortly.

## **INFORMATION NEEDED FOR SETUP**

In order to set up for download, you will likely need the following Freedom-specific information:

### **1. NAIC Codes**

Freedom will download for the following NAIC Codes:

**10783F** (Cornerstone National Insurance Company)

**27502F** (Western General Insurance Company)

### **2. Origination Address**

Freedom Origination Address – **IBM949FNI**

NOTE: Only agents with **AfW** and **AMS360** need to enter this address as part of their company set up.

### **3. Company unique coverages**

At this time Freedom does not have any company unique Coverage codes.

### **4. 5BPI20 Company Product Codes:**

#### California Producers

**CCA** = Freedom Camino Program

**WCA** = Freedom Vanguard Program

#### Arizona Producers

**CAZ** = Freedom Falcon Program

**WAZ** = Freedom Summit Program

#### Colorado Producers

**CCO** = Freedom Condor Program

## **AFTER COMPLETING THE SETUP SCREENS**

1. Once the set up process is complete, fill out the form below and either return it to your marketing representative, or fax it to: **866-324-0987**.
2. You will be contacted when we are ready to download the test batch for your agency. The Freedom test download will consist of 5-6 recent transactions (one of each type), for real policies from your book of business.
3. After you confirm the success of the test download, Freedom will prepare the initial download (if requested by the agency) based on your choice indicated on the form below.
4. Starting **next day** after the initial download has been completed, your regular downloads will begin on a daily basis. All daily transactions (except non-renewals) processed for your agency code(s) will be downloaded to your agency management system, usually within 24 hours.

# FREEDOM AGENCY MANAGEMENT DOWNLOAD SET UP FORM

Fill out this form and return to your Freedom Marketing representative, or fax to (866) 324-0987.

**Agency Name:** .....

List ALL 4-digit **Producer IDs** assigned by Freedom to your offices: .....

Your agency downloads policies

for **all offices combined** into one Agency Management System

for **each office individually** (\*)

(\*) **NOTE:** If you download for each office individually, you will need to submit the information requested below on the **separate** set up form for each office.

**Agency Management System** ..... **Version in use** .....

Your agency is already **set up with IVANS**  Yes  No (\*\*)

YACCT: .....

User ID: .....

Machine Address (optional) .....

(\*\*) **NOTE:** If your agency has not been set up with IVANS yet, Freedom will create a new IVANS account for you and will provide you with additional set up instructions.

**Contact person** at your agency for AMS download questions:

Name .....

Phone .....

E-mail .....

**Initial Download.** Indicate your choice:

Download only one latest transaction for every “alive” policy (active or just expired, but with the open renewal offer). **Note: Recommended option.**

Download all recent transactions having occurred within the last 30, 60 or 90 days (circle the number). **Note: some active policies from your book of business with no recent activity may not be included in this type of download.**

Download all transactions for all policies from day #1. **Note: NOT recommended option unless the book of business is reasonably small.**

Do not perform any initial downloads, just start downloading the daily transactions.

## Freedom Use Section. Milestones.

#	Action	Date	#	Action	Date
1	ARS set up (ars.ivans.com)		7*	RLM : set IL = I (only for IL_LATEST)	
2	FIST set up (AMS settings + contact)		8	Initial Load	
3	RLM set up (IVANS)		9	RLM : set IL = P (optional)	
4	ARS set up - Confirmed		10	Initial Load – Confirmed	
5	Test download		11	Turn on Daily Downloads (FIST)	
6	Test download - Confirmed		12	RLM : set IL = NO	
			13	Successful production - Confirmed	

(\*) The systems which require IL\_LATEST to be done under regular IL=NO setting (skip step 7): **Quomation PowerManage.**