



CSE/IVANS Trading Partner Registration

Please complete and return this form in order to begin electronic download interface for CSE policy data down to your agency management system.

Please note: CSE does not support commissions/billing download.

CSE will complete your registration within 2 to 5 business days after receipt of your completed form.

If not on our certified systems list, then please also complete page 2.

Certified Agency Management Systems

- ✓ Applied (TAM, Vision, Prelude, Doris)
- ✓ AMS (AMS360, AFW, Prime2000)
- ✓ Hawksoft CMS
- ✓ FiServ (FSCManager)
- ✓ NASA (Eclipse)
- ✓ Quomation (PowerManage)
- ✓ Others (WinAA; EasyApps Pro; QuickFile)

Return your completed form to CSE AgencyNow Support

Mailing Address

2121 N. California Blvd, Suite 980 - Walnut Creek, CA 94596

Fax number

925-817-6489, Attn: AgencyNow Support

E-mail (click below)

agencytechnology@cseinsurance.com

Toll-free Phone

1-800-282-6848, option 5

Direct Phone

925-817-6439, Jimm Pierson

Tell us about your Agency Location

Agency Name

Registration Type:

New Request

Revision

CSE Agency code(s):

CSE sub-agent code(s), or, "All"

At Start-up:

Initial Full File

Per Policies Renew

Location Address

Phone number

Fax number

Agency email address

About your Management System

Vendor, and system name

System version number

Desired Start Date:

Comments

Who is your Download Contact (at, or, for the agency)

Name

Phone

Fax number

Email

Mailing address (if different than above)

Your IVANS Trading Partner Info (optional)

Agency Account ID

Agency User ID

Machine Destination Address (IBM...)

CSE Trading Partner Info

CSE Account ID

CSEG

CSE User ID

CSEGSA2

CSE Origination Address

IBM415CSEINS

Activation (CSE Internal use only)

Request Received Date	Request Completed Date	Deny / Pend / Approve Comment
Location Manager ID	ARS.IVANS Date	AgentDown Start Date