



**Vertafore™**

Unleash your potential

# TransactNOW

## Frequently Asked Questions

### What is TransactNOW and how will it benefit my agency?

TransactNOW™ is a Vertafore solution that enables you to connect with your carriers in real time directly from your agency management systems. TransactNOW is fast, easy and secure. It allows you to perform service transactions (e.g., billing inquiries, claims inquiries and policy view inquiries), endorsements and bridging right from within your agency management system as well as upload policy and customer information. The TransactNOW Carrier Passport functionality can manage and store login credentials for all of your carrier websites. The functionality provided by TransactNOW has consistently proves to improve workflow and reduce the time it takes to conduct business with your carriers.

### How much does TransactNOW cost for an agent/agency?

TransactNOW and its real-time connectivity are provided to Vertafore agency management system customers at no additional cost. In fact, industry studies have shown that not using the TransactNOW tool's real-time capabilities will end up costing your agency in the long run—in unnecessary duplicate data entry, compromised security and the time lost not using TransactNOW.

### How can I show the ROI (return on investment) by using TransactNOW to the decision makers at my agency?

The main investment is the one your agency has already made in the choice of your agency management system to manage your business, using TransactNOW makes use of your system's full potential. There are several online tools available if you would like to quantify how much you can save by using TransactNOW, including [amsservices.com/tnowsavings.cfm](http://amsservices.com/tnowsavings.cfm) and [getrealtime.org/active/GROWTH.asp](http://getrealtime.org/active/GROWTH.asp)

### Which Vertafore agency management systems work with TransactNOW?

All Vertafore agency management systems, both in-house and online, work with TransactNOW: AMS 360, AfW, Sagitta, Prime and InStar.

### How can I get a list of carriers that are TransactNOW Carrier Partners?

Carriers of all sizes, national and regional, are on board with TransactNOW, and more continue to join! For a current list go to: [amsservices.com/carrierpartnerlists](http://amsservices.com/carrierpartnerlists)

### One of my carriers isn't on the TransactNOW carrier partner list. How can I get them added?

Carriers partner with Vertafore to offer TransactNOW real-time functionality to our mutual agents. If one of your carriers has not yet signed on to TransactNOW, the most effective way to encourage them to explore partnership is to tell them how much TransactNOW benefits your agency, and how much easier it is for you to work with carriers who are on board with real time via TransactNOW. Also, please let Vertafore know either by entering feedback into the TransactNOW suggestion box (in the upper right corner of the TransactNOW window) or by e-mailing [connectivity@vertafore.com](mailto:connectivity@vertafore.com).

TransactNOW leverages technology most carriers already have in place, so it is very easy for them to implement, with no additional development work necessary on their part. For more information, please refer your carriers to [www.transactnow.com](http://www.transactnow.com), or have them e-mail [connectivity@vertafore.com](mailto:connectivity@vertafore.com) for more information.

### How do I learn about new TransactNOW features and new carrier partners when they become available?

In multiple ways—visit [www.transactnow.com](http://www.transactnow.com) for the latest announcements and the most current listing of supported carriers and transactions. You can read the latest news section (the scrolling messages on the top of the TransactNOW screen) within the TransactNOW product itself. Also, watch for e-mails from Vertafore and the AMS Users' Group as well as carrier communications, news articles and press announcements.

## One of my carriers is on the TransactNOW carrier partner list but doesn't offer all of the real-time capabilities I need. How can I get them to add functionality?

It is in everyone's best interests for carriers to offer as much real-time functionality as possible via TransactNOW. If one of your carriers doesn't offer full functionality, let them know the additional capabilities that would be of benefit to you. In some cases, carriers may not be aware of all of the functionality that TransactNOW can provide, or in other cases the carrier may be limited in the functionality they can offer due to internal processing systems that cannot easily be changed. For both cases, they should call their carrier solutions account manager, or e-mail [connectivity@vertafore.com](mailto:connectivity@vertafore.com) to have the appropriate person within Vertafore contact them directly.

## What are the hardware and software requirements to install TransactNOW?

There are very minimal hardware and software requirements to install TransactNOW. For a complete list, including minimum levels of the Vertafore agency management systems support, please visit: [amsservices.com/tnowsystemrequirements](http://amsservices.com/tnowsystemrequirements).

## How do I decide which version of TransactNOW is right for me?

While there is one install of the TransactNOW client version, there are currently three versions of TransactNOW to choose from:

- **AMS 360**
- **Network-managed**
- **Local/standalone**

If you are an AMS 360 agent, selecting the AMS 360 radio button during the client software installation is all you need to do. Agents on Sagitta/Sagitta Online, AfW/AfW Online, Prime/Prime Online, InStar/InStar.asp can choose between the network-managed version and the local/standalone version. The difference between the two is in where your carrier credentials (aka your carrier website user IDs and password) are stored. In the network-managed version, the credentials are stored in a secure file on your network, whereas in the local/standalone version, each user and/or desktop has its own secure database of carrier credentials. While the version you choose is an individual agency decision, the network-managed version provides your agency with more flexible password management.

## I'm on Sagitta, AfW, Prime or InStar and I want to install the network-managed version of TransactNOW. Does this mean I don't need to install anything on individual PCs?

The network-managed version consists of two components—the server-side software, which handles the credential database, and the client-side software that handles the connection from the desktop to the server. The client-side software does need to be installed on every workstation, but is in a format that can be pushed out to individual desktops if that is how your agency distributes software. For more detailed information about how to install the network or client components of TransactNOW, please refer to the TransactNOW Password Management Server Manual and the TransactNOW Manual respectively.

## Does the network-managed version of TransactNOW allow my users to manage their own passwords or do I have to assign one person to manage all user IDs and passwords for my agency?

The network-managed version allows for a large degree of flexibility with regard to password management. Depending on your agency's structure, you can assign one or more employees to be administrators, you can create groups that share passwords, you can also have individuals maintain their own passwords. There is also the option to keep individuals from accessing the credential database altogether! For more information about password management options with the network-managed version, go to the "TransactNOW user account roles" section of the TransactNOW Password Management Server Manual.

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