



**Vertafore™**

Unleash your potential

# Vertafore Customer Resources



## We want to hear from you

Communication is a two-way street—that's why we rely on customer feedback for our product and program development. At any time, we invite you to e-mail us with input. We also regularly conduct surveys with you after you have contacted our support team. The information we gather helps us to identify ways to serve you better so you can achieve business success with Vertafore solutions.

## Vertafore

800.444.4813

[marketing@vertafore.com](mailto:marketing@vertafore.com)

**Valuable resources to maximize your experience.** When you invest in a system from Vertafore, you can rest assured that Vertafore is investing in you.

## Ongoing Product Enhancements with One Vertafore

**Delivering technologies that are relevant to your business.**

Vertafore's new structure allows us to better integrate products, provide more consistency in sales, support and services, and leverage the insurance and technology expertise of our 1,100 employees.

With a large, dedicated team focused on product innovation, we have the resources to continually improve the scalability, functionality and performance of your products so you can better service your customers and grow your business.

As part of your monthly maintenance fees, you receive upgrades, maintenance releases, service packs and documentation sets as soon as they're available.

What's more, the Vertafore Customer Care team will work closely with you to help your agency upgrade to new versions quickly and easily.

## Technical Support Options

**Timely, effective help when you need it.**

Because everyone needs a little help sometimes, Vertafore provides in-depth technical support through a variety of options plus a sophisticated online system for logging and tracking service requests. Vertafore consistently achieves customer satisfaction ratings of over 90% for support services.

### Key offerings include:

- **FOCUS**—our web-based customer support system provides you with answers to support questions from expert technicians. If necessary, technicians can access your desktop remotely to help with your case. FOCUS is your go-to communication center for product announcements, hot topics and tips, technical documents and a wealth of other resources.
- **Online chat**—available from within the Help Center and FOCUS helps you get quick answers from product experts.
- **Solution search**—a streamlined way to search our online knowledge base for answers to common support inquiries and fixes.

- Self-directed online help—from within your Vertafore product includes tutorials, topics, and troubleshooting tips. Web-based product training provides audience-specific, step-by-step guidance for accountants, service professionals, producers and agency owners.

## Customer Communications

**Insider knowledge, so you're always up-to-date.**

- **Exchange Monthly**—An online newsletter packed with information on enhancements, upcoming releases, tips and tricks and technical information customized for the products you use.
- **Exchange**—A quarterly magazine publication mailed to your agency and available online that features customer successes, valuable industry information, ideas for building your business, press articles, how-to guides, plus news about upcoming events, special promotions and more.
- **e-Mail communications**—When you opt in, Vertafore e-mails keep you informed about product offerings, support updates, news and promotions.

## Secure and Reliable Hosting

**Full protection of your data in a world-class data center.**

When you use a hosted, web-based solution from Vertafore, you can be



confident your agency's valuable data is secure because of the reliability and capacity of the Vertafore Data Center.

The Data Center conducts regular Cybertrust risk assessments and vulnerability scanning to make sure systems are secure. With data backup and restoration capabilities, our world-class facility ensures that your system and data are protected and available—no matter what.

## Membership in the AMS Users Group (AMSUG)

**Education, a free exchange of ideas, advocacy and information.**

As a Vertafore customer, you automatically become a member of AMSUG, one of the most active, highly regarded trade associations in any industry. AMSUG is a not-for-profit organization representing more than 15,000 independent insurance agencies—and advocating on your agency's behalf. Though independent of Vertafore, we maintain a close

working relationship and frequently monitor the AMSUG e-Communities for customer comments.

### AMSUG benefits include:

- Extensive, in-depth education, including live and recorded webinars.
- Networking opportunities with colleagues and peers through online forums, the annual national conference, regional conferences and more than 100 local chapter meetings.
- National industry representation.
- A Product Enhancement Request System (PERS) that gives you a voice in requesting new product features and enhancements.
- Visit [amsug.org](http://amsug.org) to find out more about this valuable resource.

Vertafore is the leading provider of software, services and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 15,000 customers and 200,000 end users gain a competitive advantage to accelerate their business performance.

