



POWERING  
YOUR  
POSSIBLE.



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# MY VERTAFORE PORTAL

## Using the *My Vertafore* Self Service Portal

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## Using the My Vertafore Self Service Portal

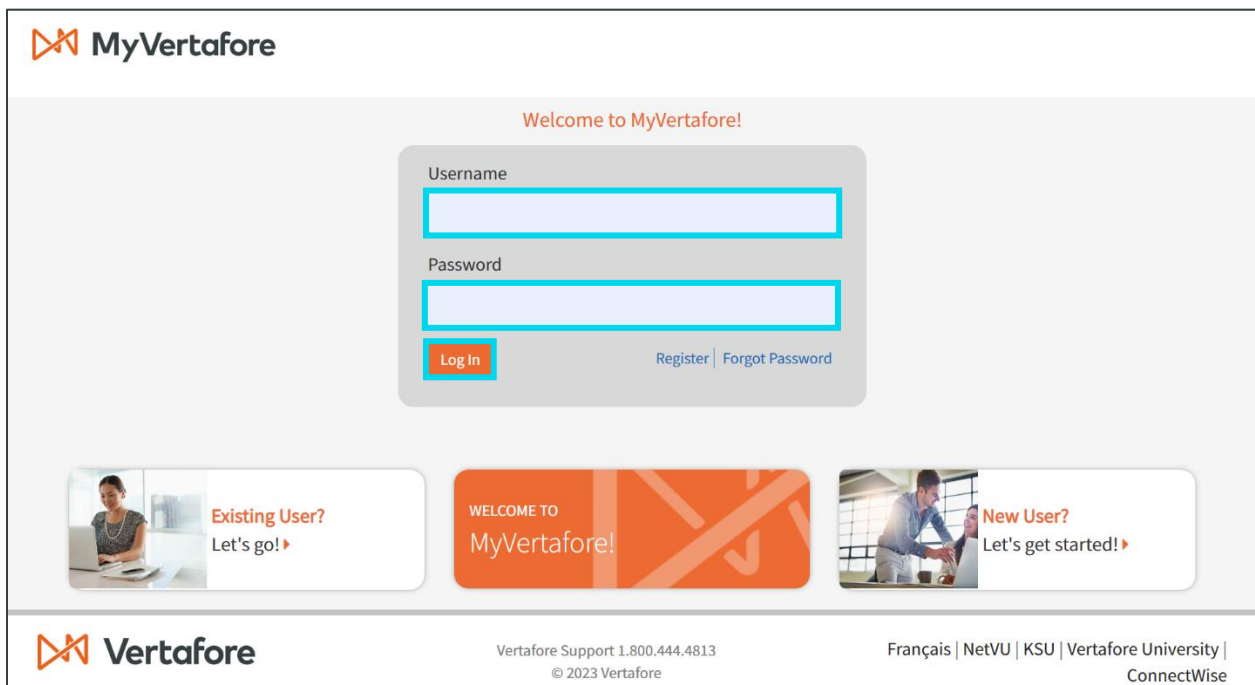
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Welcome to the My Vertafore Self-Service Portal! You can use the Self-Service Portal to:

1. Log a new support case and receive a case number immediately
2. Set the type and severity level of your case
3. Attach additional files or comments needed to help resolve your open case
4. Check the status of your open case at any time
5. Search the Knowledge Base

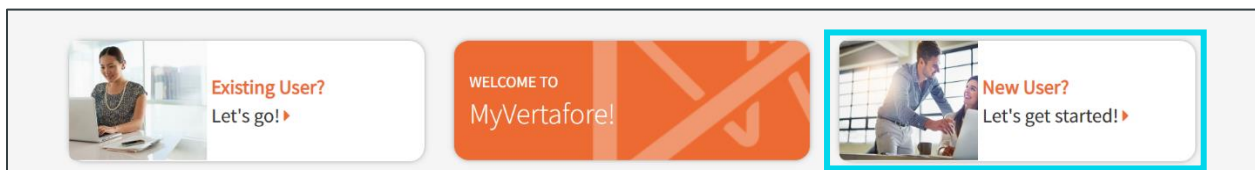
### Log In

1. Open your web browser and navigate to: <https://support.vertafore.com/>
2. The page will appear in your browser as shown below. Enter your My Vertafore **Username** and **Password** in the fields provided, and then click **Log In**.



The screenshot shows the MyVertafore login page. At the top left is the MyVertafore logo. Below it, the text "Welcome to MyVertafore!" is displayed. The main content area contains a login form with two input fields: "Username" and "Password". Below the "Password" field is a "Log In" button. To the right of the "Log In" button are links for "Register" and "Forgot Password". At the bottom of the page, there are three navigation tiles: "Existing User? Let's go! ▶", "WELCOME TO MyVertafore!", and "New User? Let's get started! ▶". The footer contains the Vertafore logo, contact information (Vertafore Support 1.800.444.4813, © 2023 Vertafore), and language options (Français | NetVU | KSU | Vertafore University | ConnectWise).

**Note:** If you are a new user, click the **New User?** tile at the bottom of the page and complete the registration form.

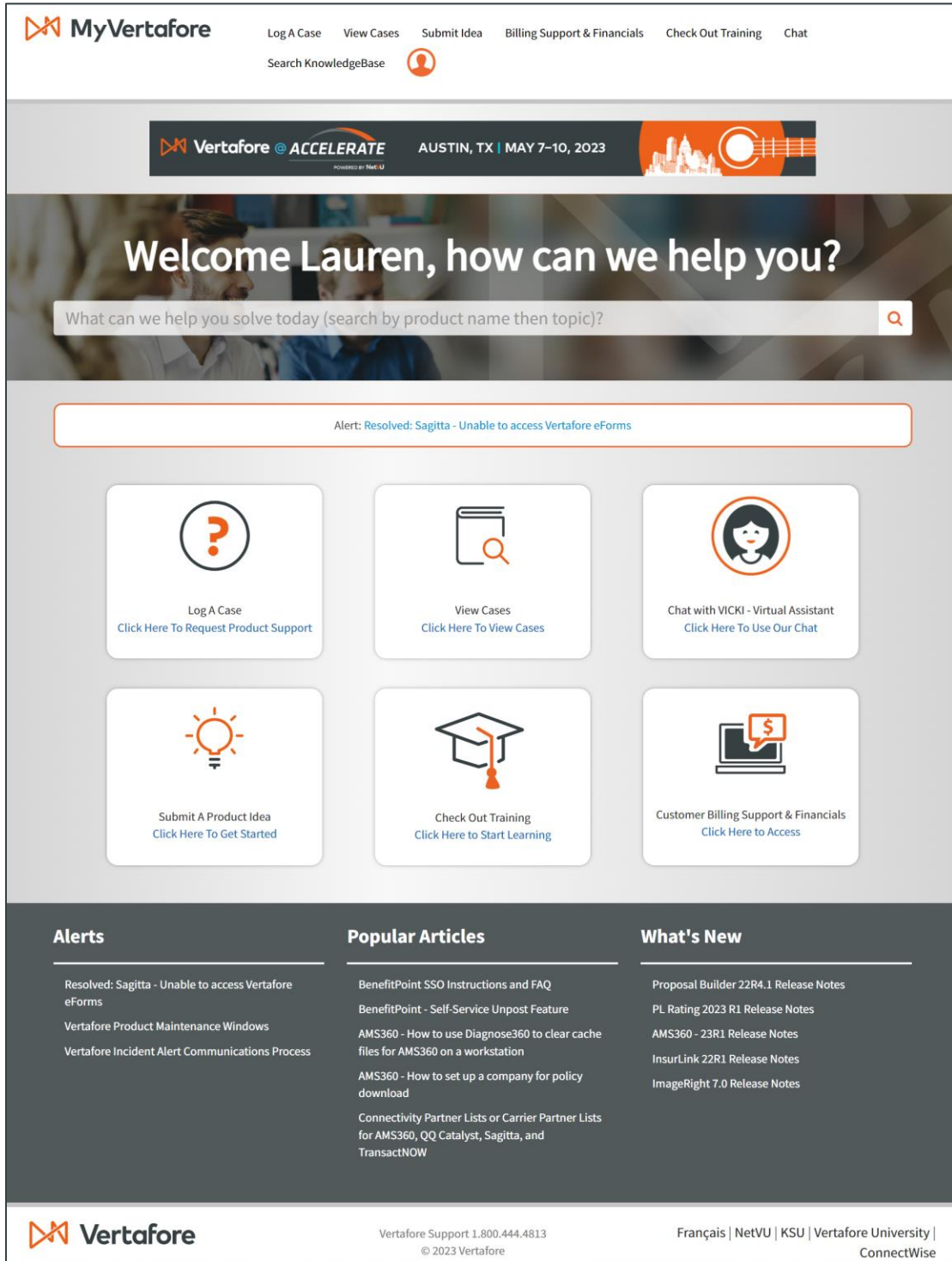


This screenshot is identical to the previous one, but the "New User? Let's get started! ▶" tile at the bottom right is highlighted with a blue border, indicating the recommended action for new users.

**Section:** Using the My Vertafore Self Service Portal

**Home Page**

After you log in, the **Self-Service Portal home page** will appear as shown below.

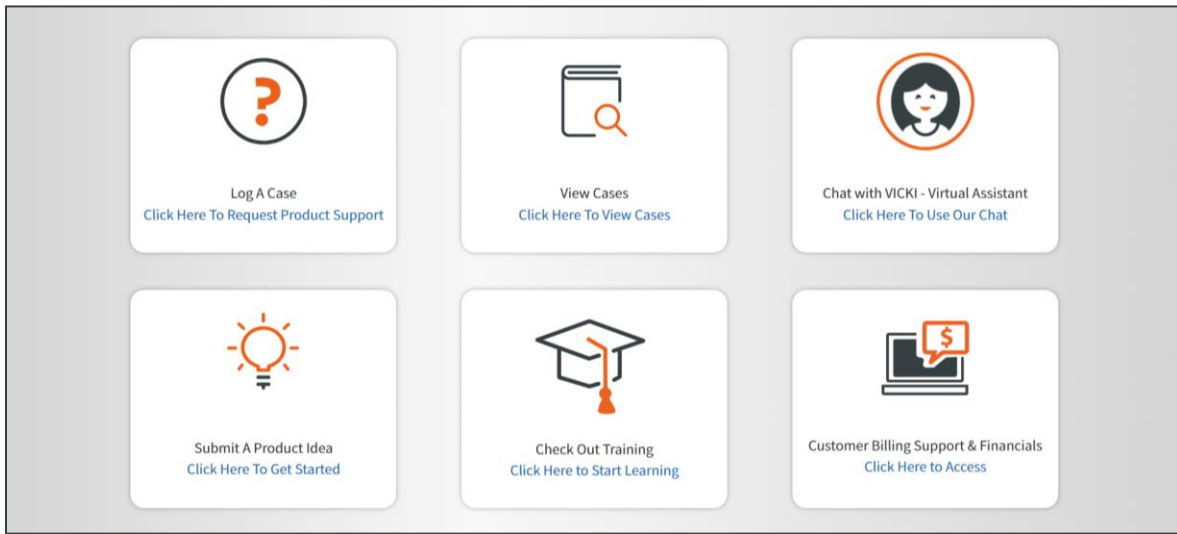


The screenshot shows the MyVertafore Self-Service Portal home page. At the top, there is a navigation bar with the MyVertafore logo and links for Log A Case, View Cases, Submit Idea, Billing Support & Financials, Check Out Training, and Chat. Below the navigation bar is a search bar for the KnowledgeBase and a user profile icon. A banner for the Vertafore ACCELERATE event in Austin, TX, from May 7-10, 2023, is displayed. The main heading reads "Welcome Lauren, how can we help you?" followed by a search bar with the placeholder text "What can we help you solve today (search by product name then topic)?". An alert box indicates a resolved issue: "Alert: Resolved: Sagitta - Unable to access Vertafore eForms". Below the alert are six service tiles: Log A Case, View Cases, Chat with VICKI - Virtual Assistant, Submit A Product Idea, Check Out Training, and Customer Billing Support & Financials. The footer contains three columns: Alerts, Popular Articles, and What's New, each with a list of relevant links. The bottom of the page features the Vertafore logo, support contact information (1.800.444.4813), and regional links for Français, NetVU, KSU, Vertafore University, and ConnectWise.

**Section:** Log a Support Case

From the home page, you can perform the following functions:

- Log a support case
- View your cases
- Check out training
- Contact Customer Billing Support & Financials



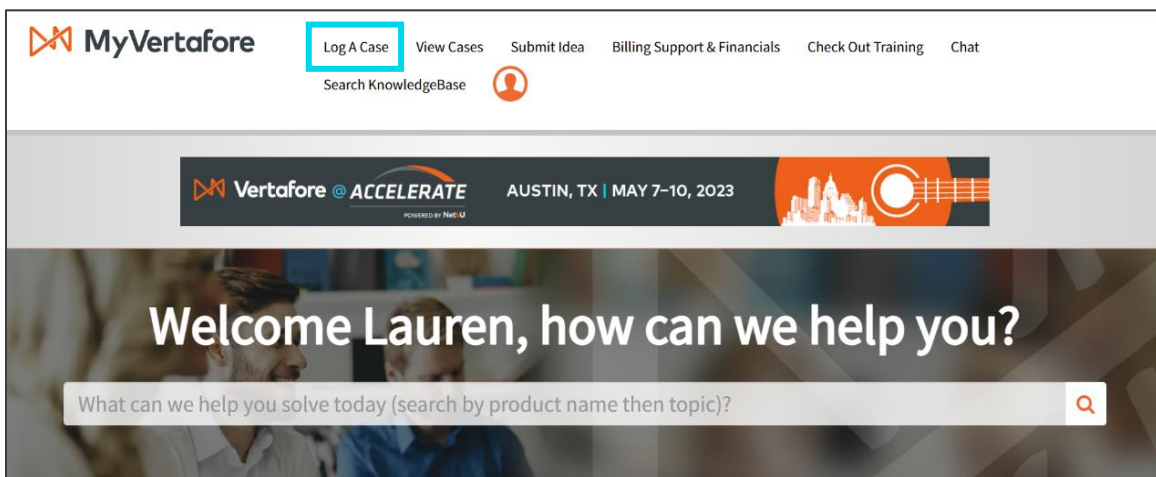
---

## Log a Support Case

---

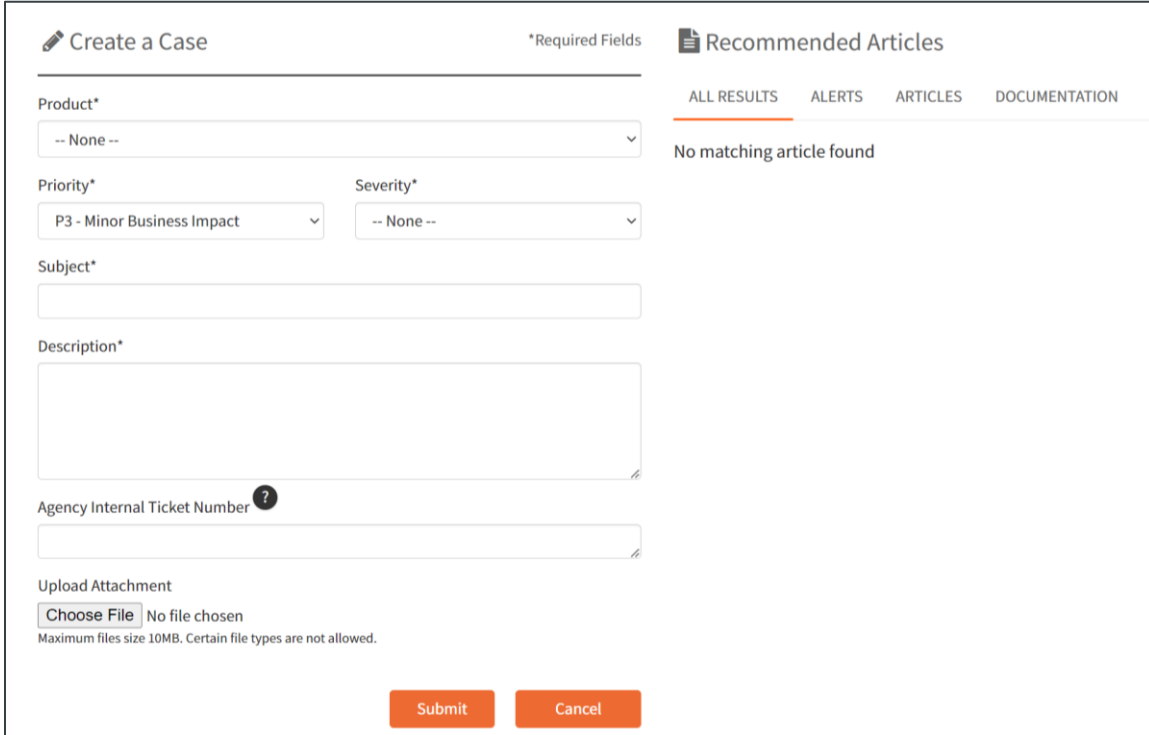
Cases are used to request product support from the Vertafore team. Your case will be routed to the appropriate team to solve your issue or answer your question as quickly as possible.

1. To log a new case, click on the **Log a Case** link on the top navigation bar.



**Section:** Log a Support Case

- The **Create a Case** page will appear and you can provide the following information:



The screenshot shows the 'Create a Case' form with the following fields and options:

- Product\***: A dropdown menu currently showing '-- None --'.
- Priority\***: A dropdown menu currently showing 'P3 - Minor Business Impact'.
- Severity\***: A dropdown menu currently showing '-- None --'.
- Subject\***: A text input field.
- Description\***: A large text area for detailed description.
- Agency Internal Ticket Number**: A text input field with a help icon.
- Upload Attachment**: A 'Choose File' button, 'No file chosen', and a note: 'Maximum files size 10MB. Certain file types are not allowed.'

At the bottom of the form are 'Submit' and 'Cancel' buttons. On the right, the 'Recommended Articles' section shows 'ALL RESULTS', 'ALERTS', 'ARTICLES', and 'DOCUMENTATION' tabs, with 'No matching article found' displayed below.

- Choose a **Product** from the dropdown list.

**Note:** Depending on the product you select, you may need to fill out additional fields. In this example, we need to select the **Issue Type** and the **Environment**.

- Choose a **Priority** from the dropdown list. This represents the impact this issue has on your daily business process. These priorities are based on the Service Level Agreement provided with your Vertafore contract. You can choose from the following options:
  - **P4 - General Questions**
  - **P3 - Minor Business Impact**
  - **P2 - Significant Business Impact**
  - **P1 - All Users Unable to Work**
- Choose a **Severity** from the dropdown list. This is how urgently you feel this should be treated. You can choose from the following options:
  - **Urgent**
  - **High**
  - **Medium**
  - **Low**

## Section: Log a Support Case

 **Create a Case** \*Required Fields

---

Product\*

Please select from the following\*

Environment\*

Priority\* Severity\*


 **Recommended Articles**

ALL RESULTS   ALERTS   ARTICLES   DOCUMENTATION

---

No matching article found

6. Type a **Subject** – use a phrase that describes your case, for example, “Error adding new user.”
  - The **Recommended Articles** section on the right side of the page will suggest items based on the information you have provided. If there are no matches, proceed with creating your case.

 **Create a Case** \*Required Fields

---


Product\*

Please select from the following\*

Environment\*

Priority\* Severity\*

Subject\*

 **Recommended Articles**

ALL RESULTS   ALERTS   ARTICLES   DOCUMENTATION

---

**Sircon - Error - "Cannot add/reactivate Appointments because Appointments are limited"** [Article] 000019422 | 10/26/2017

This article describes the cause of the **error**: "Cannot add/reactivate Appointments because Appointments are limited"

---

**Sircon - Appointment and Termination Error Code Definitions for CT** [Article] 000019417 | 10/26/2017

This article provides the definition of each **error** code that may be thrown on a CT appointment request.

---

**Sircon - Subscriber Accounts - Error: Additional Subscriber** [Article] 000019418 | 10/26/2017

7. Type a **Description** – provide information to describe the nature of your case. The description should answer the following questions:
  - Was there a confirmation number or transaction number?
  - Was there an error code or statement?
  - What were you trying to do when the error occurred?
  - What producer/firm were you working with?
  - What is your question?

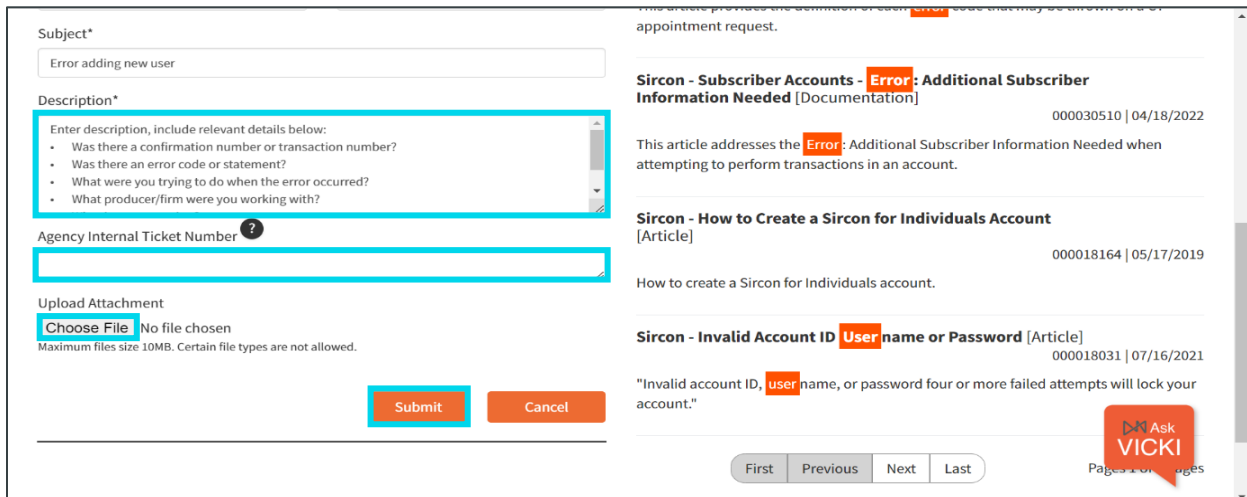
**Warning:** Do not include SSN or other PII in the case description. Please provide the NPN or Producer Manager Individual/Firm ID to identify records with errors.

## Section: Log a Support Case

8. Type an **Agency Internal Ticket Number** if you have one. This is where you can track your company ticket if you have one. This is not viewable on our side.
9. You can also **Upload Attachments** of any number of files that may serve to help resolve your case (screenshots, spreadsheets, or other documents).
  - To attach a document to your support case, click the button under the **Upload Attachment** section. A window will open where you can search for a local file on your computer. Once the desired file is selected, click **Open**.

**Warning:** Do not upload documents that include Social Security numbers. Remove Social Security numbers from documents before uploading them.

10. Click **Submit** when you are finished adding information to your support case.



The screenshot shows a support case logging form on the left and a list of articles on the right. The form fields are highlighted with blue boxes:

- Subject\*:** Error adding new user
- Description\*:** Enter description, include relevant details below:
  - Was there a confirmation number or transaction number?
  - Was there an error code or statement?
  - What were you trying to do when the error occurred?
  - What producer/firm were you working with?
- Agency Internal Ticket Number:** (Empty field)
- Upload Attachment:** Choose File (No file chosen. Maximum files size 10MB. Certain file types are not allowed.)

Buttons: **Submit** and **Cancel**

The article list on the right includes:

- Sircon - Subscriber Accounts - Error: Additional Subscriber Information Needed [Documentation]** (000030510 | 04/18/2022)  
This article addresses the **Error: Additional Subscriber Information Needed** when attempting to perform transactions in an account.
- Sircon - How to Create a Sircon for Individuals Account [Article]** (000018164 | 05/17/2019)  
How to create a Sircon for Individuals account.
- Sircon - Invalid Account ID User name or Password [Article]** (000018031 | 07/16/2021)  
"Invalid account ID, **user** name, or password four or more failed attempts will lock your account."

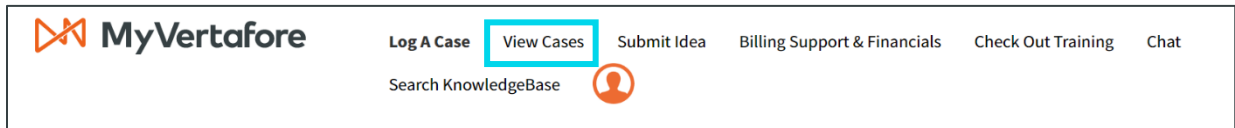
Navigation: First, Previous, Next, Last. A red "Ask VICKI" button is visible in the bottom right corner.

11. A new case notification will be automatically sent to you to let you know that your support case has been logged and assigned to a Customer Support Analyst.

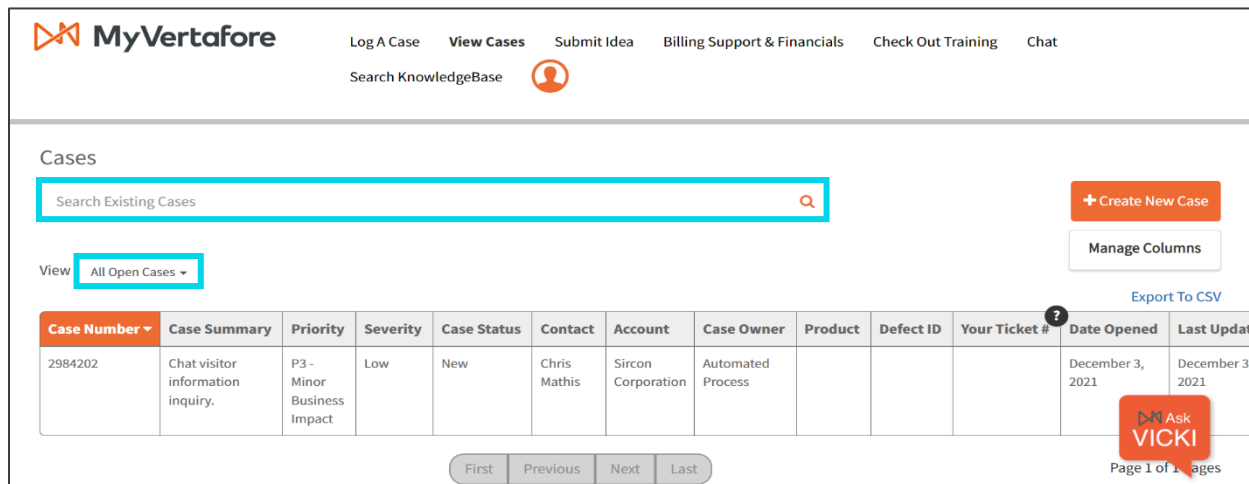


## View Your Cases

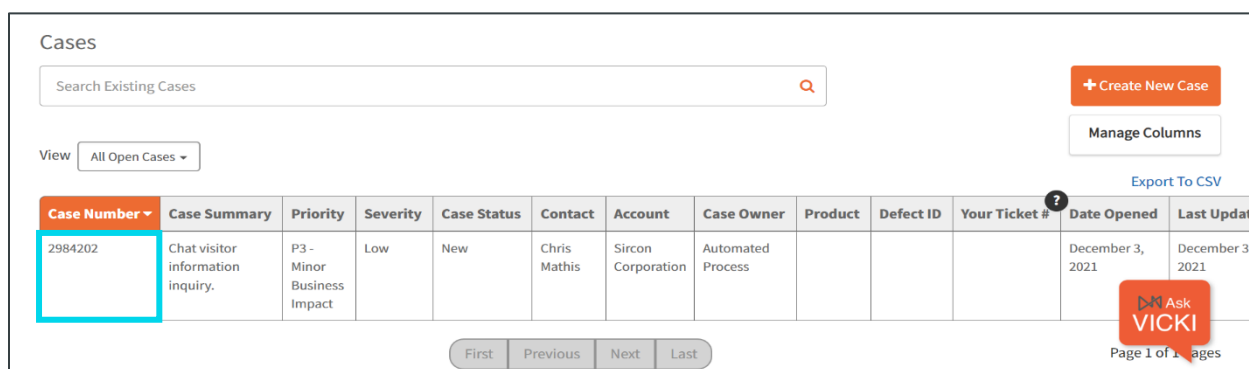
- To view your cases, click on the **View Cases** link on the top navigation bar.



- The **Cases** page will appear. The Cases page allows you to search existing cases using the **search bar** and filter cases using the **View** dropdown list.



- Click a case number to open the **Case Details** page.



- The **Case Details** page allows you to **Close**, **Update**, or **Reopen your Case**.
- You can view or add **Attachments** or **Comments** related to your case. Adding attachments or comments to your case helps Vertafore representatives to better assist you.

## Section: Create a Case Report

Case 2984202      Chat visitor information inquiry.

---

Case Details - 2984202

<b>Opened:</b> December 3, 2021	<b>Updated:</b> December 3, 2021
<b>Status:</b> New	<b>Severity:</b> Low
<b>Contact:</b> Chris Mathis	<b>Account:</b> Sircon Corporation
<b>Product:</b>	<b>Case Owner:</b> Automated Process
<b>Defect ID:</b>	<b>Your Ticket #:</b> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">?</span>
<b>Subject:</b> Chat visitor information inquiry.	
<b>Description:</b> Testing	

Close
Update

---

Attachments Attachments

File Name	Size (KB)	Attachment Added By	Date
No results found			

Add Comment

---

Case Comments

Comment	By	Date
No results found		

## Create a Case Report

The **Cases** page also allows you to export case data to a CSV file.

1. Use the **View** dropdown list to filter cases. Click **Manage Columns** to preview the columns that will be included in your case report.
2. To exclude a column, clear the checkbox.

Cases

View All Closed Cases ▾

Case Number	Case Summary	Priority	Severity	Case Status	Contact	Account	Case Owner	Product	Defect ID	Your Ticket #	Date O
3509405	3 producers I can't appoint in AL	P3 - Minor Business Impact	Urgent	Closed	Jordan Coker	Sircon Corporation	Jordan Coker	Sircon Producer Manager			May 10, 2023
3507841	Password Reset - Success - One community user matched, email sent	P3 - Minor Business Impact	Low	Closed	Clayton Busbey	Sircon Corporation	Unassigned				May 3, 2023
3502213	Password Reset - Success - One community user matched, email sent	P3 - Minor Business Impact	Low	Closed	Jeff Koll	Sircon Corporation	Unassigned				May 3, 2023
3501384	testing 123	P3 - Minor Business	Low	Closed	Jordan Coker	Sircon Corporation	Jordan Coker	Sircon Producer			May 3, 2023

+ Create New Case

**Manage Columns**

- Case Summary
- Priority
- Severity
- Case Status
- Contact
- Account
- Case Owner
- Product
- Defect ID
- Your Ticket #
- Date Opened

Ask VICKI

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**Section:** Search the KnowledgeBase

- Click **Export to CSV** and then the file will be downloaded automatically.

Cases

Search Existing Cases

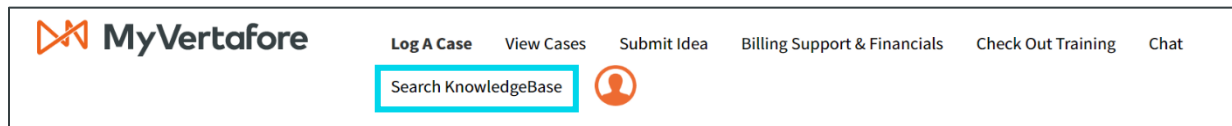
View All Closed Cases

[+ Create New Case](#) [Manage Columns](#) [Export To CSV](#)

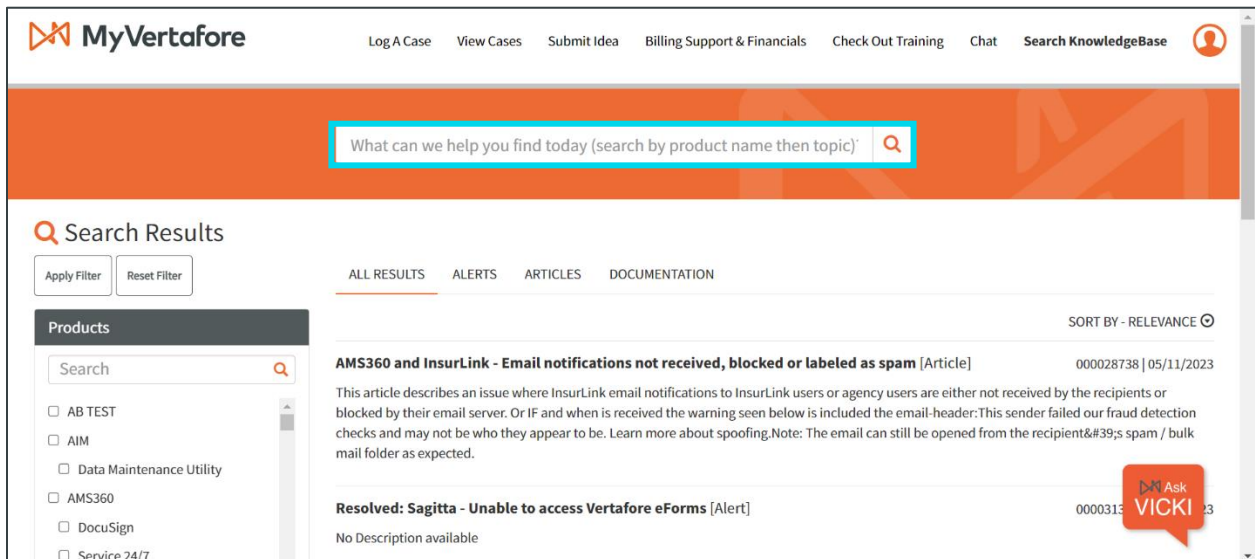
Case Number	Case Summary	Priority	Severity	Case Status	Contact	Account	Case Owner	Product	Defect ID	Your Ticket #	Date Opened	Last Update
3509405	3 producers I can't appoint in AL	P3 - Minor Business Impact	Urgent	Closed	Jordan Coker	Sircon Corporation	Jordan Coker	Sircon Producer Manager			May 10, 2023	May 10, 2023
3507841	Password Reset - Success - One community user matched, email sent	P3 - Minor Business Impact	Low	Closed	Clayton Busbey	Sircon Corporation	Unassigned				May 9, 2023	May 9, 2023

## Search the KnowledgeBase

- To search for content, click on the **Search KnowledgeBase** link on the top navigation bar.



- The KnowledgeBase allows you to search existing content by using the **Search Bar**. Suggestions will appear in a list as you type.



MyVertafore [Log A Case](#) [View Cases](#) [Submit Idea](#) [Billing Support & Financials](#) [Check Out Training](#) [Chat](#) [Search KnowledgeBase](#)

What can we help you find today (search by product name then topic)

**Search Results**

[Apply Filter](#) [Reset Filter](#)

Products

Search

AB TEST

AIM

Data Maintenance Utility

AMS360

DocuSign

Service 24/7

ALL RESULTS [ALERTS](#) [ARTICLES](#) [DOCUMENTATION](#)

SORT BY - RELEVANCE

**AMS360 and InsurLink - Email notifications not received, blocked or labeled as spam** [Article] 000028738 | 05/11/2023

This article describes an issue where InsurLink email notifications to InsurLink users or agency users are either not received by the recipients or blocked by their email server. Or IF and when is received the warning seen below is included the email-header: This sender failed our fraud detection checks and may not be who they appear to be. Learn more about spoofing. Note: The email can still be opened from the recipient's spam / bulk mail folder as expected.

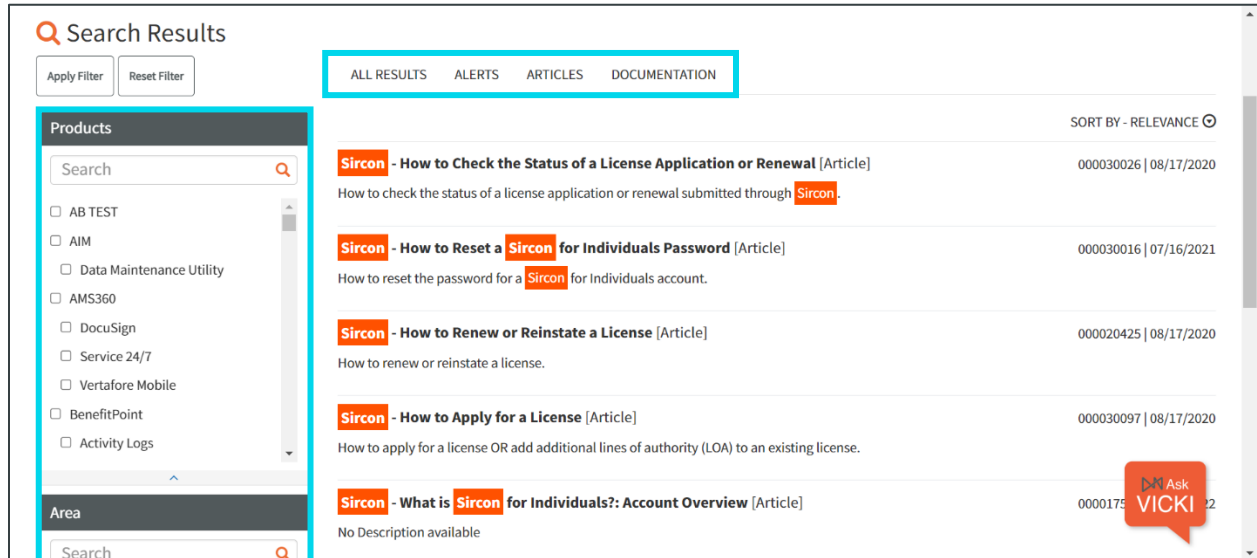
**Resolved: Sagitta - Unable to access Vertafore eForms** [Alert] 0000313

No Description available

Ask VICKI

**Section:** Search the KnowledgeBase

- You can filter results by **Product** or **Area** and content can be viewed by using the **All Results, Alerts, Articles, and Documentation** tabs.



**Search Results**

Apply Filter Reset Filter

ALL RESULTS ALERTS ARTICLES DOCUMENTATION

Products

Search

- AB TEST
- AIM
- Data Maintenance Utility
- AMS360
- DocuSign
- Service 24/7
- Vertafore Mobile
- BenefitPoint
- Activity Logs

Area

Search

SORT BY - RELEVANCE

**Sircon - How to Check the Status of a License Application or Renewal [Article]** 000030026 | 08/17/2020  
How to check the status of a license application or renewal submitted through **Sircon**.

**Sircon - How to Reset a Sircon for Individuals Password [Article]** 000030016 | 07/16/2021  
How to reset the password for a **Sircon** for Individuals account.

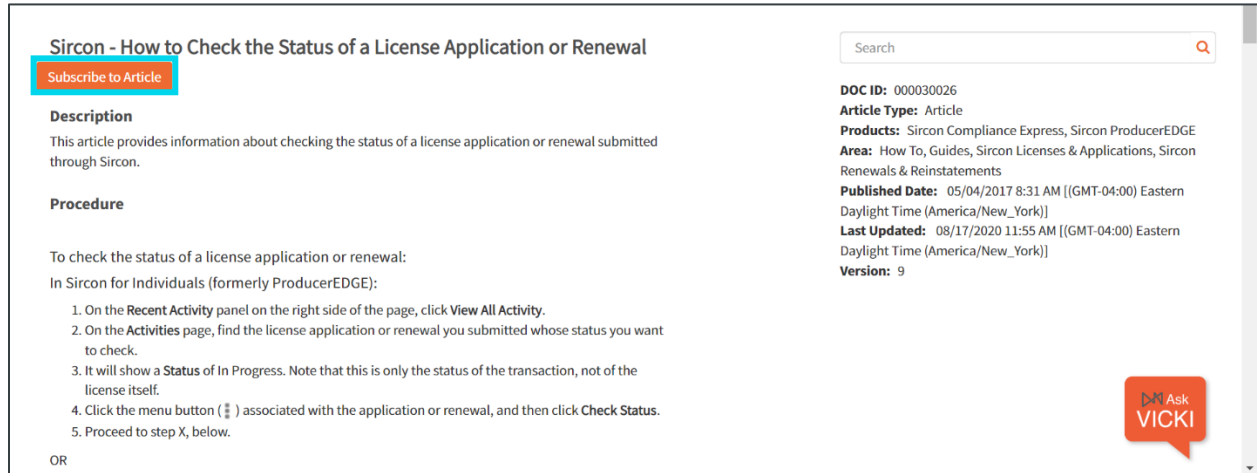
**Sircon - How to Renew or Reinstatement a License [Article]** 000020425 | 08/17/2020  
How to renew or reinstate a license.

**Sircon - How to Apply for a License [Article]** 000030097 | 08/17/2020  
How to apply for a license OR add additional lines of authority (LOA) to an existing license.

**Sircon - What is Sircon for Individuals?: Account Overview [Article]** 0000175  
No Description available

Ask VICKI

- Click on an article to view more information. You can click **Subscribe to Article** to receive notifications if there are any updates to the content.



**Sircon - How to Check the Status of a License Application or Renewal**

Subscribe to Article

**Description**

This article provides information about checking the status of a license application or renewal submitted through Sircon.

**Procedure**

To check the status of a license application or renewal:  
In Sircon for Individuals (formerly ProducerEDGE):

1. On the **Recent Activity** panel on the right side of the page, click **View All Activity**.
2. On the **Activities** page, find the license application or renewal you submitted whose status you want to check.
3. It will show a **Status** of In Progress. Note that this is only the status of the transaction, not of the license itself.
4. Click the menu button (☰) associated with the application or renewal, and then click **Check Status**.
5. Proceed to step X, below.

OR

Search

**DOC ID:** 000030026  
**Article Type:** Article  
**Products:** Sircon Compliance Express, Sircon ProducerEDGE  
**Area:** How To, Guides, Sircon Licenses & Applications, Sircon Renewals & Reinstatements  
**Published Date:** 05/04/2017 8:31 AM [(GMT-04:00) Eastern Daylight Time (America/New\_York)]  
**Last Updated:** 08/17/2020 11:55 AM [(GMT-04:00) Eastern Daylight Time (America/New\_York)]  
**Version:** 9

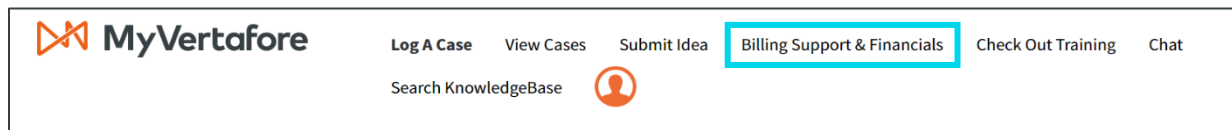
Ask VICKI

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## Billing Support & Financials

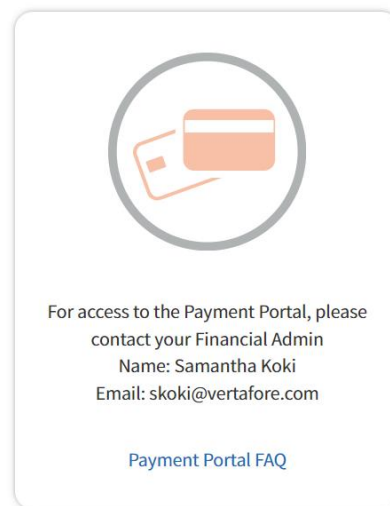
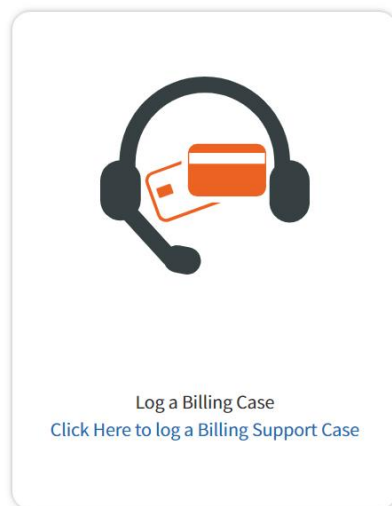
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1. To receive help with billing support and financials, click the **Billing Support & Financials** button from the top menu.



2. You will see a page with two options:

- **Log a Billing Case**
- **Payment Portal FAQ**



### Log a Billing Support Case

1. To log a support case, select the **Issue Type**.
2. Add **Additional Comments** that describe your issue.
3. You can **Upload Attachments** to the request if applicable.
4. Click **Save** to submit your issue to the Billing team.
5. Someone from the Vertafore Billing Support team will contact you as soon as possible.

**Section:** Billing Support & Financials

**Billing Support Case | Sircon Corporation**

First Name	Last Name	Billing Email Address	Phone Number
Lauren	Hall	lhall@vertafore.com	(877) 876-4420 ext. 896

**\*How can we help you?**

- Send a copy of my open invoices
- Make a payment
- Change my payment method
- Invoice Question/Dispute
- Request reduction of User/Products
- Contract Request
- Update my billing information
- Payment Portal Question/Request
- Other

**Additional Comments**

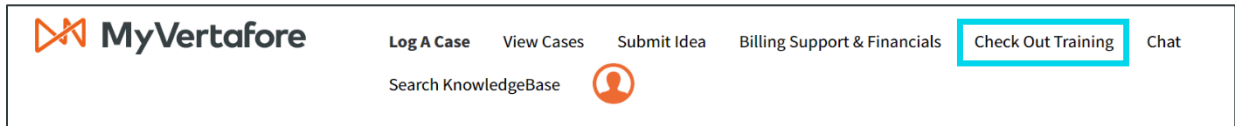
**Upload Attachment**

[Upload Files](#) Or drop files

[Go Back](#) [Cancel](#) [Save](#)


## View Vertafore Training Materials

- To view all the Vertafore training content, click **Check Out Training** from the top menu.




- Here you will find the links to the **Vertafore Learning Centers**: Vertafore University and NetVu. You will also find links to **Learning Journeys** with tailored articles for different product lines.

### Learning Center | Sircon Corporation



Vertafore University is our online learning center that hosts resources and training for Vertafore products. Great for onboarding employees or a general knowledge refresh, content is available in on-demand learning and webinar form.



Promoting self-paced e-learning, NetVU University is your resource for 24/7 access to training and certification. You'll find on-demand, web-based training on Vertafore products and systems, as well as product certification and general insurance learning opportunities.

### Learning Journeys Clear all Filters

Are you a new employee and need help with learning your Vertafore product? Or do you need a refresher on the best practices for daily tasks? Check out these learning journeys for your training needs! If you don't see your product available yet, continue to come back as we will be adding new journeys in the upcoming months.

Select the right learning journey for you.

**Product**

AMS360    BenefitPoint

ImageRight/WorkSmart    InsurLink

PL Rating    QQ Catalyst

**Role**

Accounting

Admin

CSR

Producer


**Level**

Beginner

Intermediate


Advanced

**Start your Journey** (Showing 45 Articles)




**BenefitPoint - Intro & Navigation**

First up, BenefitPoint basics. Before anything else, we'll cover navigation, searching, accessing an account, and more.



**QQCatalyst Basics**

Before getting into anything else QQCatalyst related, get started with basic login info and learning resources available.



**ImageRight & WorkSmart - Introduction**

Before getting into anything else ImageRight related, let's get started with login info, learning resources available, and basic, repeated functions of the product.

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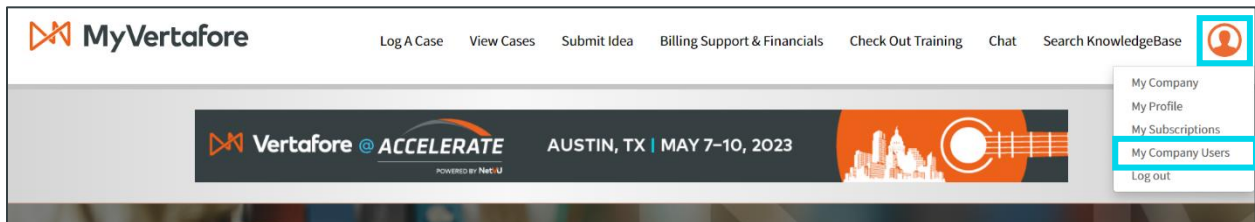
**Section:** Add Users to your My Vertafore Account

## Add Users to your My Vertafore Account

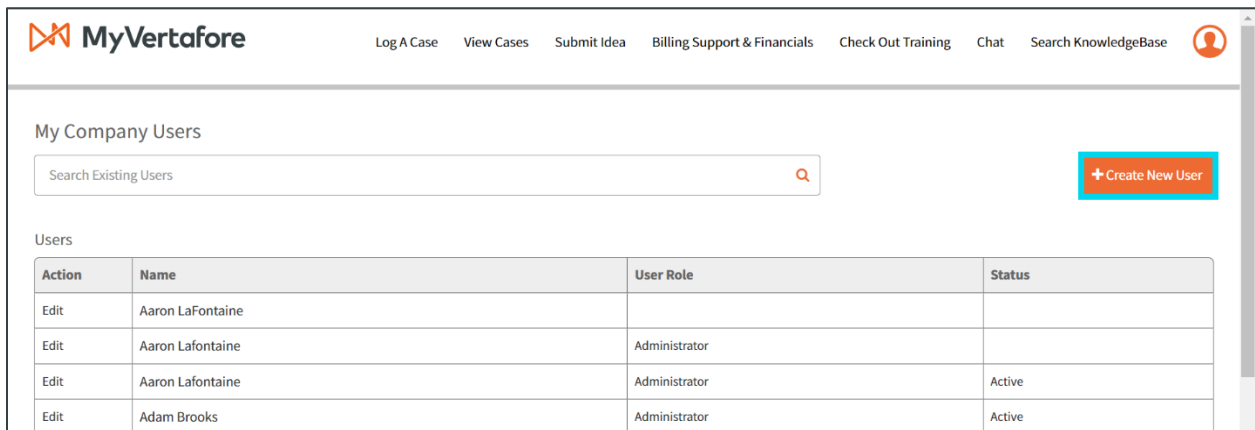
If you have administrative access, you can add new users from your organization to the My Vertafore support portal. Follow the steps below to manage access for your company.

1. Click on the avatar at the top right of the page and select **My Company Users**.

**Note:** Only Admin users will have access to this page and the ability to add new users.



2. On the **My Company Users** page, click the **Create New User** button.



3. Fill out the following required fields on this page.

- **First Name**
- **Last Name**
- **Email Address (Username)**
- **Nickname**
  - 8 character maximum
- **User Role**
  - Administrator will have ability to add new users in the portal
  - User will only be able to view their own profile
  - Knowledge Base User is not used in Sircon



**Section:** Add Users to your My Vertafore Account

- **Status**
  - Use Active to grant the user access. Use Inactive to remove access.
- **Case Type Access**
  - Billing will only have access to Billing Cases
  - Support will only have access to Support Cases
  - Both will have access to both Billing and Support Cases
- **Case Visibility Level**
  - User Level will only be able to view their own cases
  - Account Level will be able to view cases from everyone in their company
- **Language Preference for Communication**
- **Time Zone**
- **Primary Product** – the default product that will appear on support cases

### Add User

All fields with an \* are required.

<p>First Name *</p> <input type="text"/>	<p>Last Name *</p> <input type="text"/>
<p>Email Address (User Name) *</p> <input type="text"/>	<p>Nickname * ?</p> <input type="text"/>
<p>User Role *</p> <p>--None--</p>	<p>Status *</p> <p>Active</p>
<p>Case Type Access *</p> <p>--None--</p>	<p>Case Visibility Level * ?</p> <p>User Level</p>
<p>Street</p> <input type="text"/>	<p>City</p> <input type="text"/>
<p>State/Province</p> <input type="text"/>	<p>Zip/Postal Code</p> <input type="text"/>
<p>Language Preference for Communication. *</p> <p>English</p>	<p>Phone Number</p> <input type="text"/>
<p>Time Zone *</p> <p>--None--</p>	<p>Primary Product *</p> <p>Sircon Producer Manager</p>

If this is a new user, clicking the Save button will send this user an email instructing them to create a password for myVertafore.

6. Once you have completed filling out the fields on this page, click **Save** and the new user should receive an email instructing them to create a password for My Vertafore.

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## ***APPENDIX 1: My Vertafore Help Resources***

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### **Contact Vertafore Customer Support**

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877.876.4430.

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## ***APPENDIX 2: Document History***

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<b>Version</b>	<b>Revision Date</b>	<b>Revision Record</b>
1.0	5/8/2023	Original Document



999 18<sup>th</sup> St | Denver, CO, 80202 | 877.876.4430 | [Vertafore.com](https://www.vertafore.com)

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