

# Sircon User Guide

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Using the My Vertafore Self-Service Portal

November 2018



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## Using the My Vertafore Self-Service Portal

Welcome to the My Vertafore Self-Service Portal!

You can use the Self-Service Portal to:

- Log a new support case and receive a case number immediately
- Set the type and severity level of your case
- Attach additional files or comments needed to help resolve your open case
- Check the status of your open case at any time
- Submit product ideas
- Search the KnowledgeBase

### Log In

Open your web browser and navigate to: <https://support.vertafore.com/>

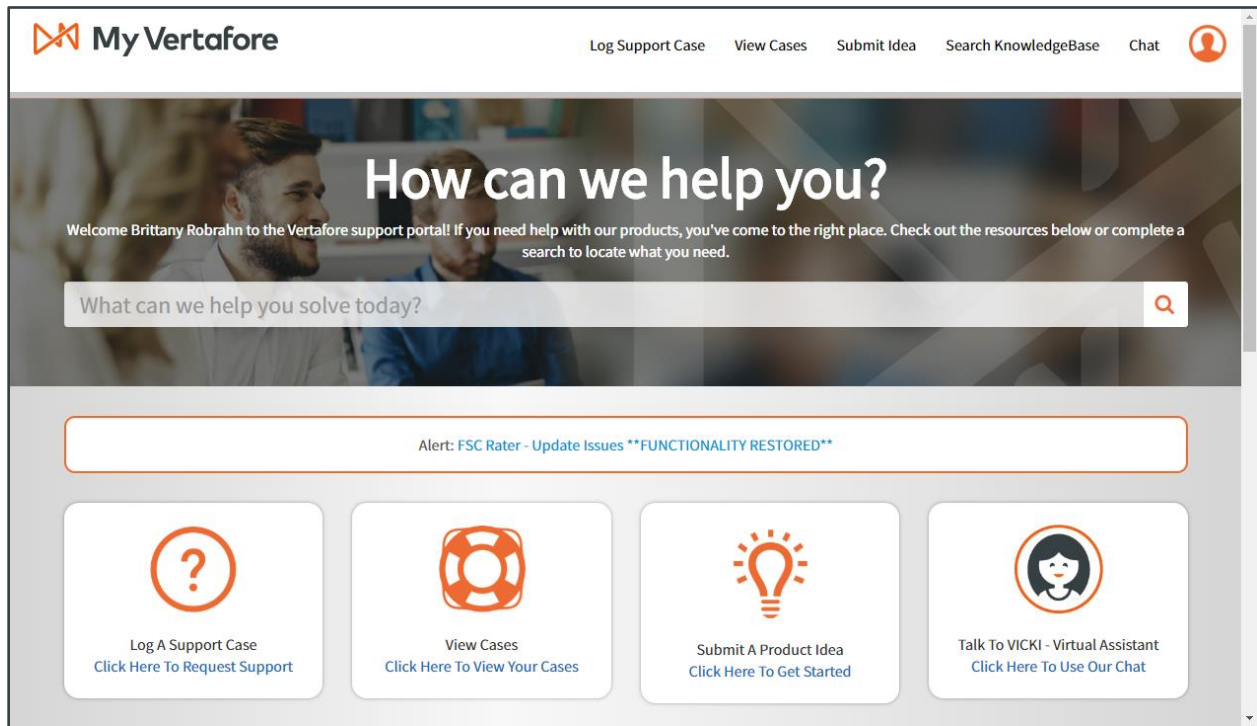
The page will appear in your browser as shown below. Enter your My Vertafore username and password in the fields provided, and then click **Log In**.

**NOTE:** If you used My Vertafore prior to May 1, 2017, click the **Existing User?** tile at the bottom of the page and follow the instructions to reset your password. If you are a new user, click the **New User?** tile at the bottom of the page and complete the registration form.

The screenshot shows the My Vertafore login page. At the top left is the My Vertafore logo. Below it, the text "Welcome to My Vertafore!" is displayed. The main content area features a login form with two input fields: "Username" and "Password". Below the password field are three buttons: "Log In" (orange), "Register" (blue), and "Forgot Password" (blue). At the bottom of the page, there are three tiles: "Existing User? Let's go! ▶" (with a woman at a laptop), "WELCOME TO My Vertafore!" (with the logo), and "New User? Let's get started! ▶" (with a man at a desk). The footer contains the Vertafore logo, contact information "Vertafore Support 1.800.444.4813 © 2017 Vertafore", and navigation links "Français | NetVU | KSU | Vertafore University | WebEx".

## Home Page

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



From the home page, you are able to perform the following functions:

- Log a support case
- View your cases
- Submit a product idea
- Search the KnowledgeBase
- Talk to VICKI – Virtual Assistant

## Log a Support Case

To log a new case, click on the **Log Support Case** link on the top navigation bar. The Create a Case page will appear and you can provide the following information:

**MyVertafore**

Create a Case \*Required Fields

Product\*  
-- None --

Priority\*  
P3 - Minor Business Impact

Severity\*  
-- None --

Subject\*

Description\*

Agency Internal Ticket Number ?

Upload Attachment  
Choose File No file chosen  
Maximum files size 10MB. Certain file types are not allowed.

Submit Cancel

1. Choose a **Product** from the dropdown list.
2. Choose a **Priority** from the dropdown list. You can choose from the following options:
  - o P4 - General Questions
  - o P3 - Minor Business Impact
  - o P2 - Significant Business Impact
  - o P1 - All Users Unable to Work
3. Choose a **Severity** from the dropdown list. You can choose from the following options:
  - o Urgent
  - o High
  - o Medium
  - o Low

4. Type a **Subject** – use a phrase that describes your case, for example, “Can't appoint in MI.” 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.
5. 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?

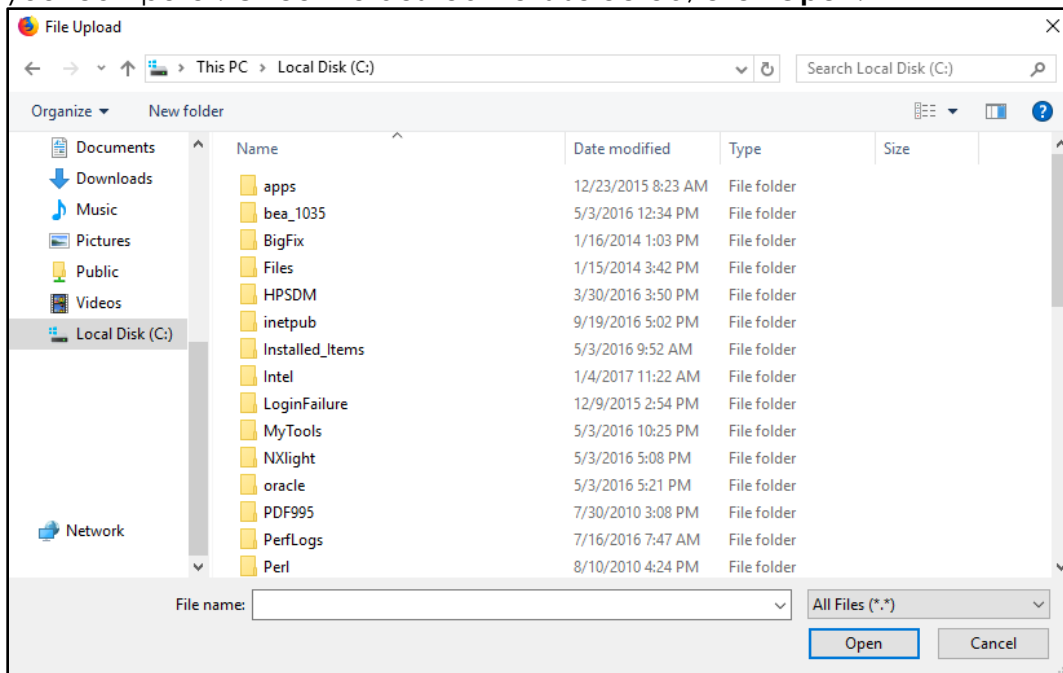
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**Warning:** Do not include Social Security numbers in the case description. Remove Social Security numbers the case description before continuing.

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6. Type an **Agency Internal Ticket Number** if you have one.
7. You can also attach 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**.



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

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

Alternatively, you can access the case details by clicking **View My Cases** on the top navigation bar.

# View Your Cases

To view your cases, click on the **View My Cases** link on the top navigation bar. The **Cases** page will appear.

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

The screenshot shows the 'My Vertafore' interface. At the top, there are navigation links: Log Support Case, View My Cases, Submit Idea, Search KnowledgeBase, Chat, and a user profile icon. Below the navigation is a search bar labeled 'Search Existing Cases' and a '+ Create New Case' button. A 'View' dropdown menu is set to 'My Cases'. Below this is a table of cases:

Case Number	Case Summary	Priority	Severity	Case Status	Contact	Account	Case Owner	Product	Defect ID	Your Ticket #	Date Opened	Last Update
1342992	AMS360 -	P3 - Minor Business Impact	Medium	Closed	Brittany Robrahn	Vertafore Internal List	Candice Keathley	DocuSign			December 20, 2017	December 20, 2017
1348241	Test	P4 - General Questions	Low	Cancelled	Brittany Robrahn	Vertafore Internal List	Sircon Enterprise	Sircon Producer Manager			December 28, 2017	January 9, 2018

At the bottom of the table are navigation buttons: First, Previous, Next, Last. A 'Page 1 of 1 Pages' indicator is also present.

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

The screenshot shows the 'Case Details' page for Case 1348241. The case title is 'Case 1348241 Test'. Below the title are two columns of information:

<b>Opened:</b>	December 28, 2017	<b>Updated:</b>	January 9, 2018
<b>Status:</b>	Cancelled	<b>Severity:</b>	Low
<b>Contact:</b>	Brittany Robrahn	<b>Account:</b>	Vertafore Internal List
<b>Product:</b>	Sircon Producer Manager	<b>Case Owner:</b>	Sircon Enterprise
<b>Defect ID:</b>		<b>Your Ticket #:</b>	
<b>Subject:</b>	Test		
<b>Description:</b>	Test		

At the bottom right of the case details are 'Close' and 'Update' buttons. Below this is the 'Attachments' section, which is currently empty with the message 'No results found'. Below that is the 'Case Comments' section, also empty with the message 'No results found'.

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.



## Create a Case Report

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

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

**Manage Columns**

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

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

**Manage Columns**

**Export To CSV**

## Submit a Product Idea

To submit a product idea, click on the **Submit Idea** link on the top navigation bar. The **Vertafore Ideas** page will appear. You can browse ideas using the **Recent**, **Trending**, and **Popular** tabs. You can filter ideas by status or product.

The screenshot shows the 'Vertafore Ideas' interface. On the left is a sidebar with a filter table:

Add a new idea	
My ideas	0
My votes	0
My subscriptions	0
FILTER BY STATUS	
Open	3171
PM&E Reviewed	961
Being Evaluated	60
Need Input	75
Under Consideration	62
On Roadmap	52
Coming in Next Release	30
Delivered	155
Existing Feature	46
Not Planned	57

The main content area has tabs for 'Recent', 'Trending', and 'Popular'. A search bar is located at the top right. Two idea cards are visible:

- Idea 1:** 'Option to Delete Duplicate Clients or Merge Existing Clients'. It has 364 votes and is marked 'On Roadmap' with 30 comments. It was created over 1 year ago by AMS360.
- Idea 2:** 'Pop up asking to change from Prospect to Customer when entering a policy.'. It has 229 votes and is marked 'Under Consideration' with 9 comments. It was created over 1 year ago by AMS360.

Before submitting an idea, we recommend that you search for your idea using the **Search Ideas** search bar.

If your idea already exists, click **Vote**. You can also post comments on idea pages. If your idea does not exist, click **Add a new idea**. You can choose a product from the dropdown list that appears, and then add information about your idea. Click **Share idea** when you are finished adding information.

The 'Add a new idea' form includes the following fields and components:

- Choose a product for this idea:** A dropdown menu with 'Vertafore Mobile' selected.
- Your idea:** A text input field with a 'Required' label and a placeholder 'One sentence summary of the idea'.
- Please add more details:** A rich text editor with a toolbar (Paragraph, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Table, Link, Unlink, Text Color) and a placeholder 'What is your need or problem, how often does this problem occur, why is it useful to be addressed, who would benefit from it?'.
- Attach files:** A link icon for attaching files.
- Product Version:** A text input field with a placeholder 'What version of the software are you on? In-House or Online?'.
- Related Products:** A text input field.
- Share idea:** A button at the bottom of the form.

# 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. You can filter results by product or area and content can be viewed by using the **All Results**, **Alerts**, **Articles**, and **Documentation** tabs.

MyVertafore Log Support Case View Cases Submit Idea Search KnowledgeBase Chat

What can we help you find today?

### Search Results

Apply Filter Reset Filter

Products

Sircon

- Sircon AgencyEDGE
- Sircon G2
- Sircon Compliance Express
- Sircon ECS
- Sircon ePAL
- Sircon for Providers
- Sircon for States
- Sircon Producer Express
- Sircon Producer Manager

ALL RESULTS ALERTS ARTICLES DOCUMENTATION

SORT BY - RELEVANCE

**Sircon - What Browsers does Sircon support?** [Article] 000013606 | 06/15/2018  
This article shows which web browsers the Sircon website supports.

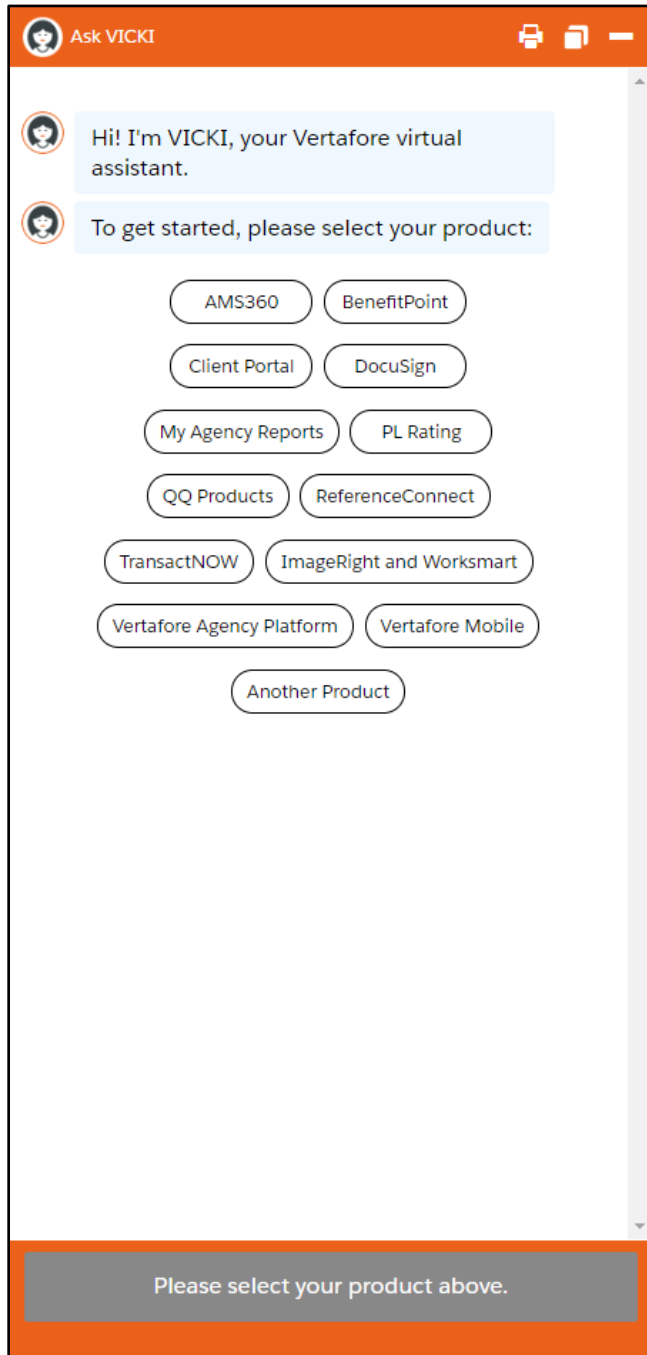
**Sircon - How to Check the Status of a License Application or Renewal** [Article] 000013372 | 06/13/2018  
This article provides information on how to check the status of an application or renewal submitted electronically with Sircon.

**Sircon - W9 Form Request** [Documentation] 000013512 | 06/13/2018  
This article has a current W9 attached to it for use.

**Sircon - How to Pay a Virginia (VA) Continuance Fee** [Article] 000013374 | 05/31/2018  
This Article will give instruction on how to pull up and pay a VA Continuance fee.

## Talk to VICKI

VICKI is an Artificial Intelligence chat support team member and can “learn” as you talk to her. To talk to VICKI, click on the **Chat** link on the top navigation bar. The **Ask VICKI** chat window will appear.



If VICKI can't answer your question during business hours, she can transfer you to a live agent. If VICKI can't answer your question outside business hours, she will create a case for you and a member of our Customer Support Team will follow up with you.