Sircon User Guide

Using the My Vertafore Self-Service Portal

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Vertafore

Contents

Using the My Vertafore Self-Service Portal

Welcome to the My Vertafore Self-Service Portal!

You can use the Self-Service Portal to:

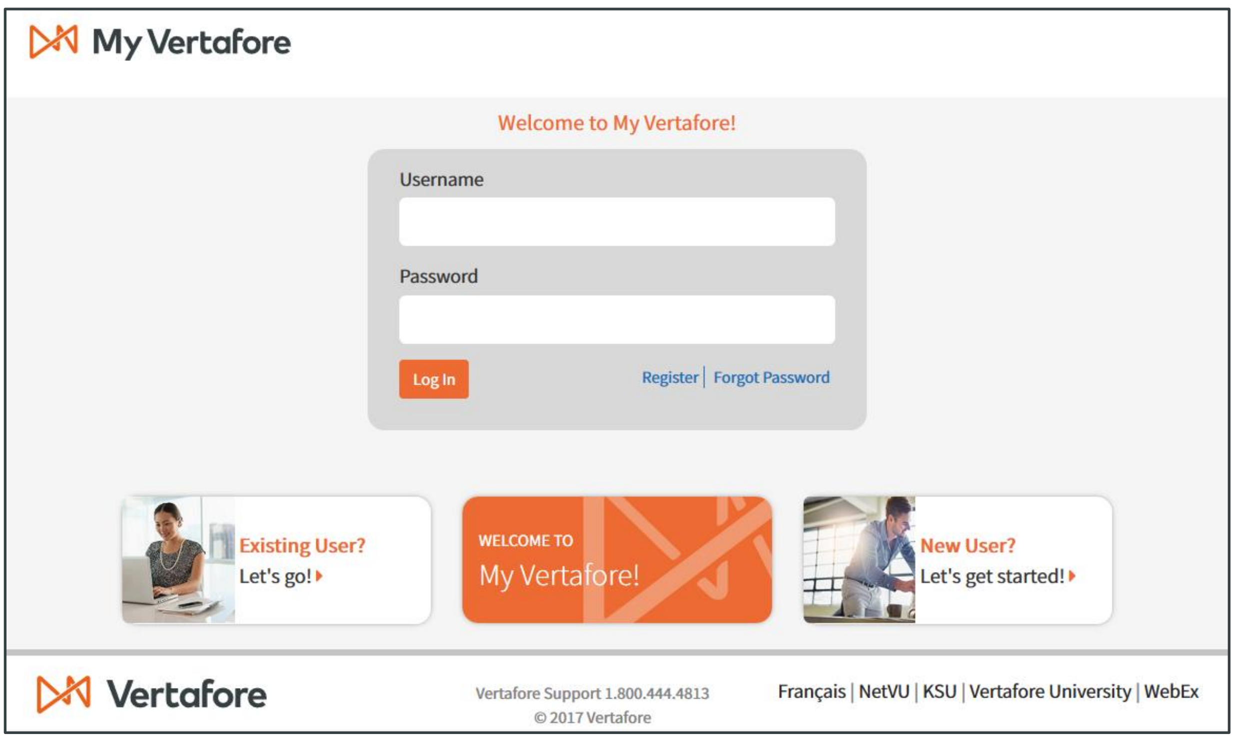
- Log a new support case and receive a case number immediately
- Set the type and severity level of your case
- Attach additional files or comments needed to help resolve your open case
- Check the status of your open case at any time
- Submit product ideas
- Search the KnowledgeBase

Log In

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

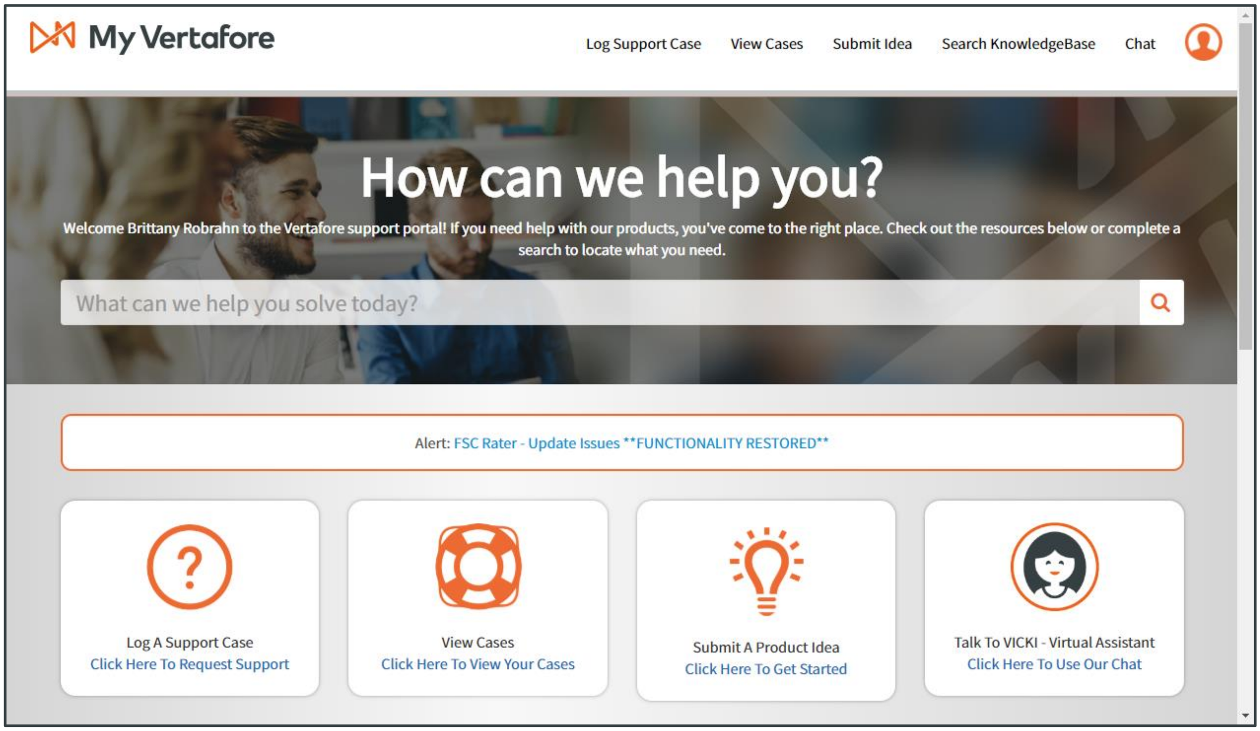
The page will appear in your browser as shown below. Enter your My Vertafore username and password in the fields provided, and then click **Log In**.

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.



Home Page

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

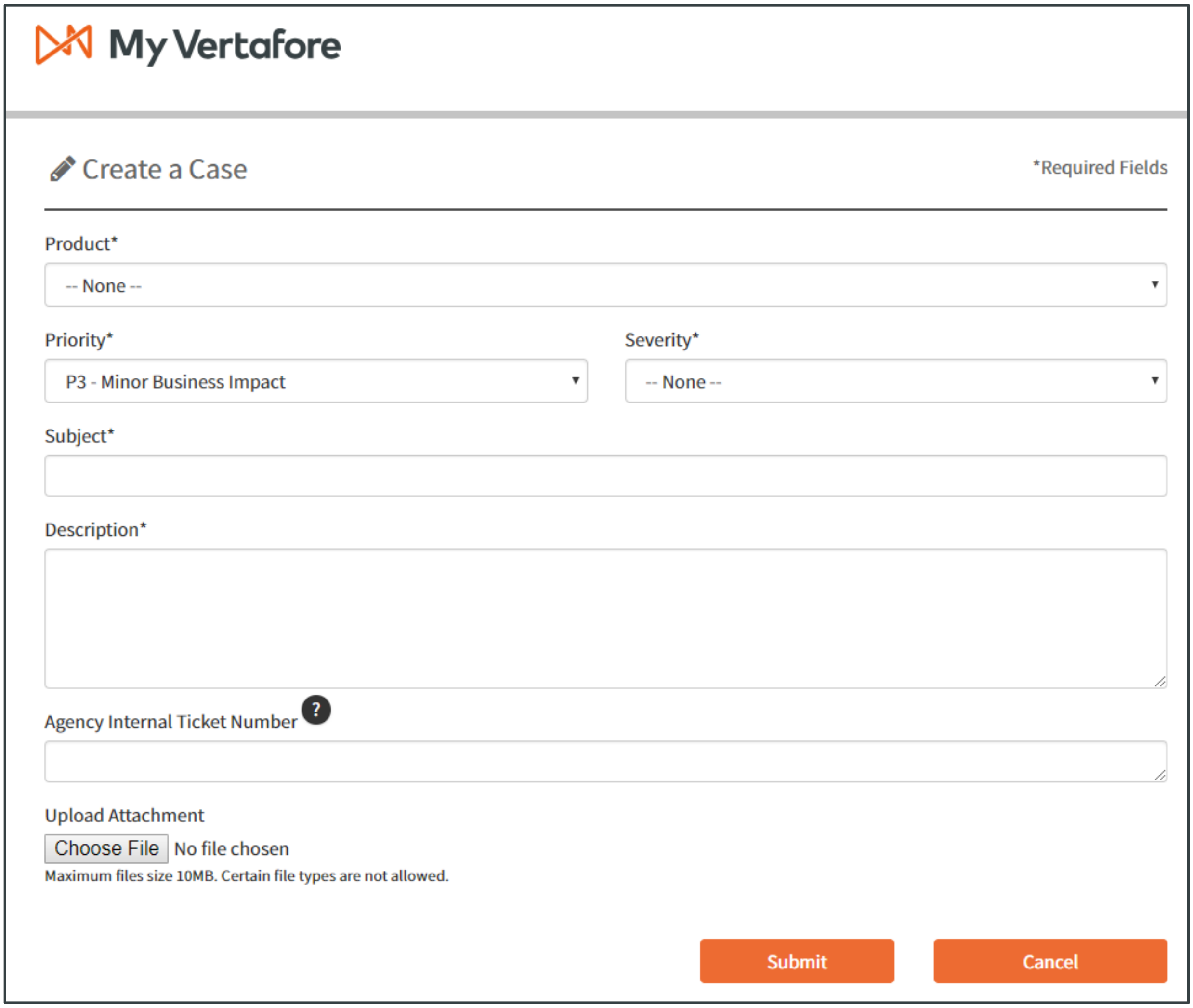


From the home page, you are able to perform the following functions:

- 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:



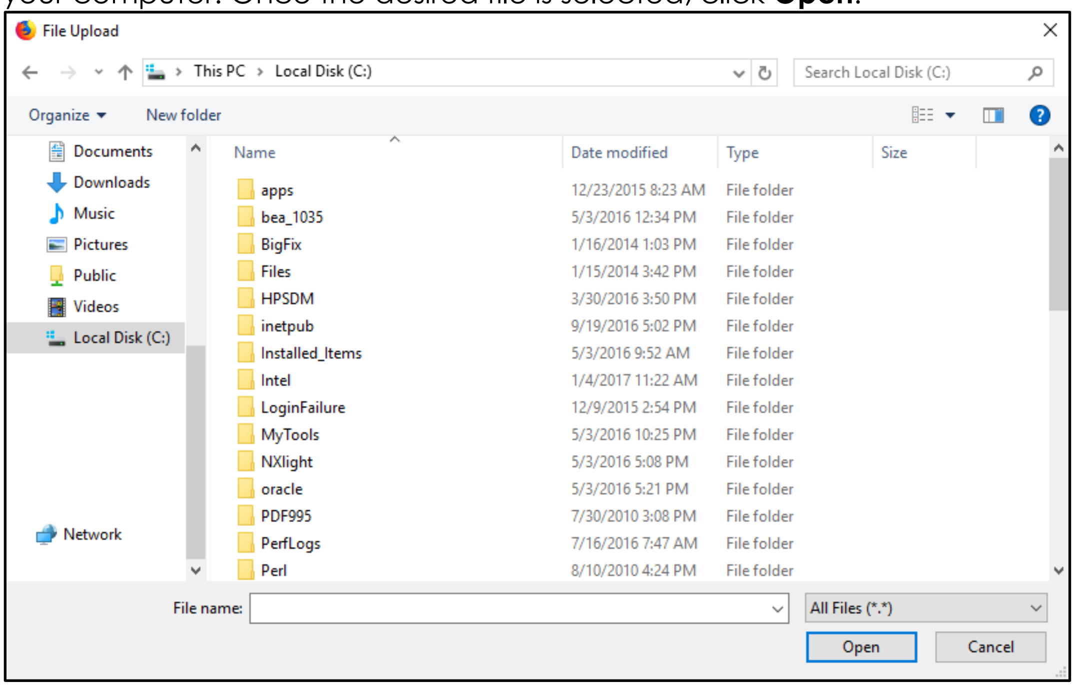
1. Choose a **Product** from the dropdown list.
2. Choose a **Priority** from the dropdown list. You can choose from the following options:
    - P4 - General Questions
    - P3 - Minor Business Impact
    - P2 - Significant Business Impact
    - P1 - All Users Unable to Work
3. Choose a **Severity**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

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

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**.



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

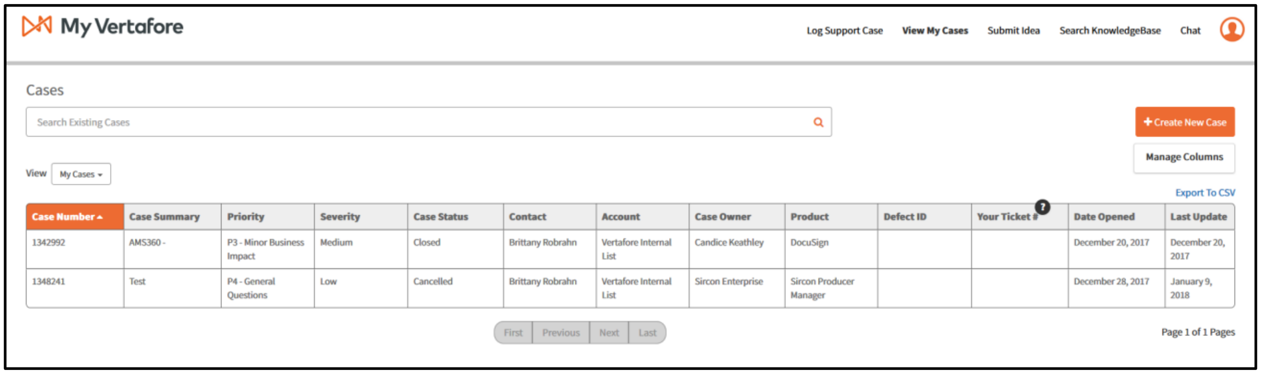
8. Click **Submit** when you are finished adding information to your support case. A new case notification will be automatically sent to you to let you know that your support case has been logged and assigned to a Customer Support Analyst.

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

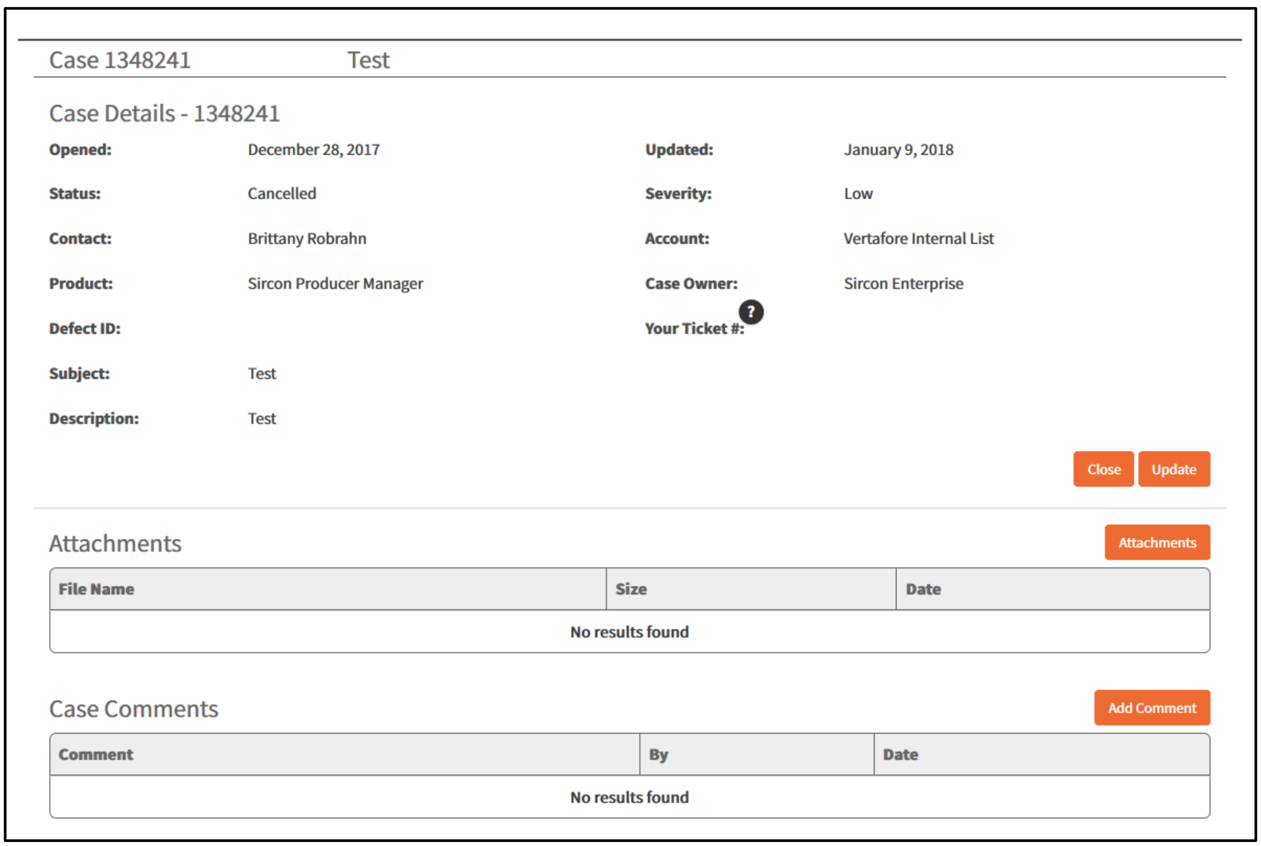
View Your Cases

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.



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



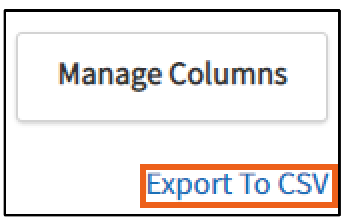
The **Case Details** page allows you to close, update, or reopen your case. You can view or add attachments or comments related to your case. Adding attachments or comments to your case helps Vertafore representatives to better assist you.

Create a Case Report

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

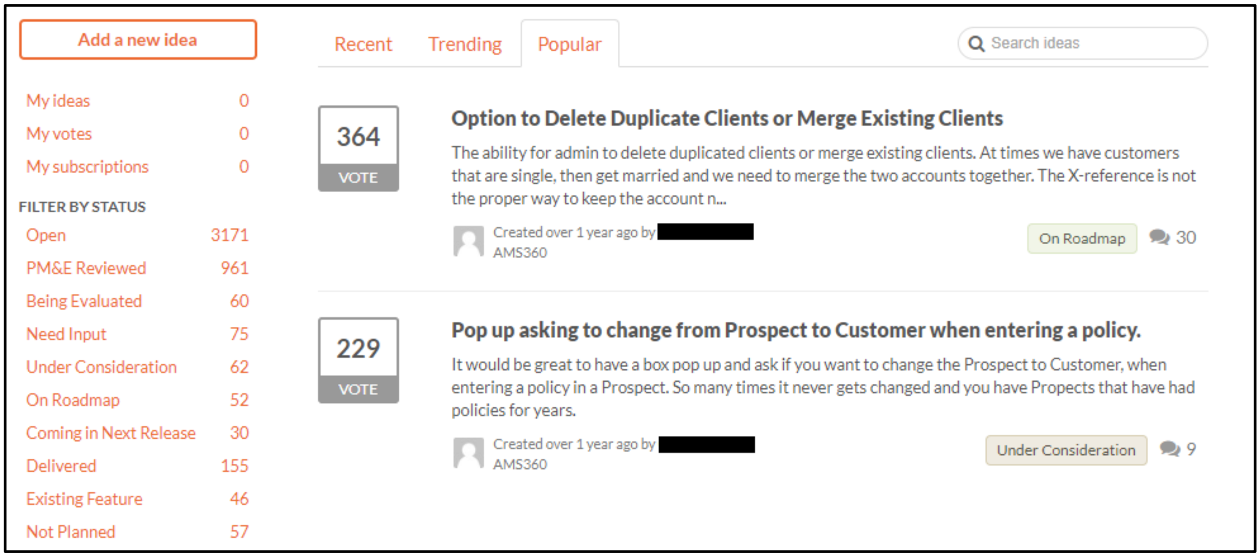
Use the **View** dropdown list to filter cases. Click **Manage Columns** to preview the columns that will be included in your case report. To exclude a column, clear the checkbox.

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



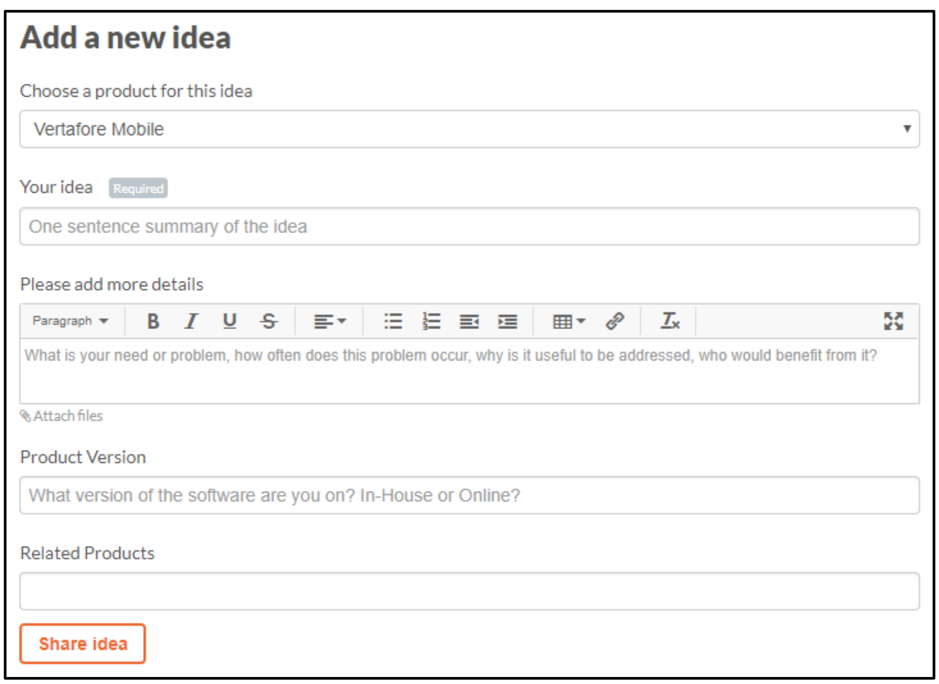
Submit a Product Idea

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.



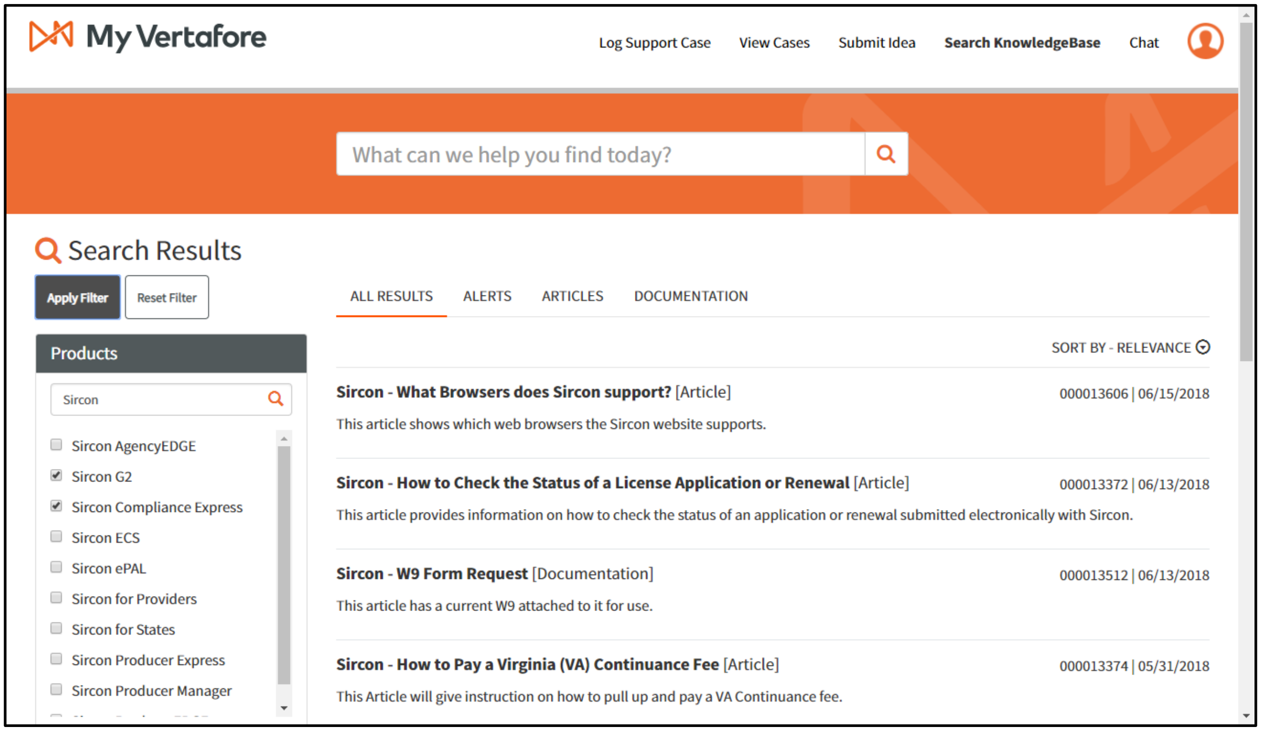
Before submitting an idea, we recommend that you search for your idea using the **Search Ideas** search bar.

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.



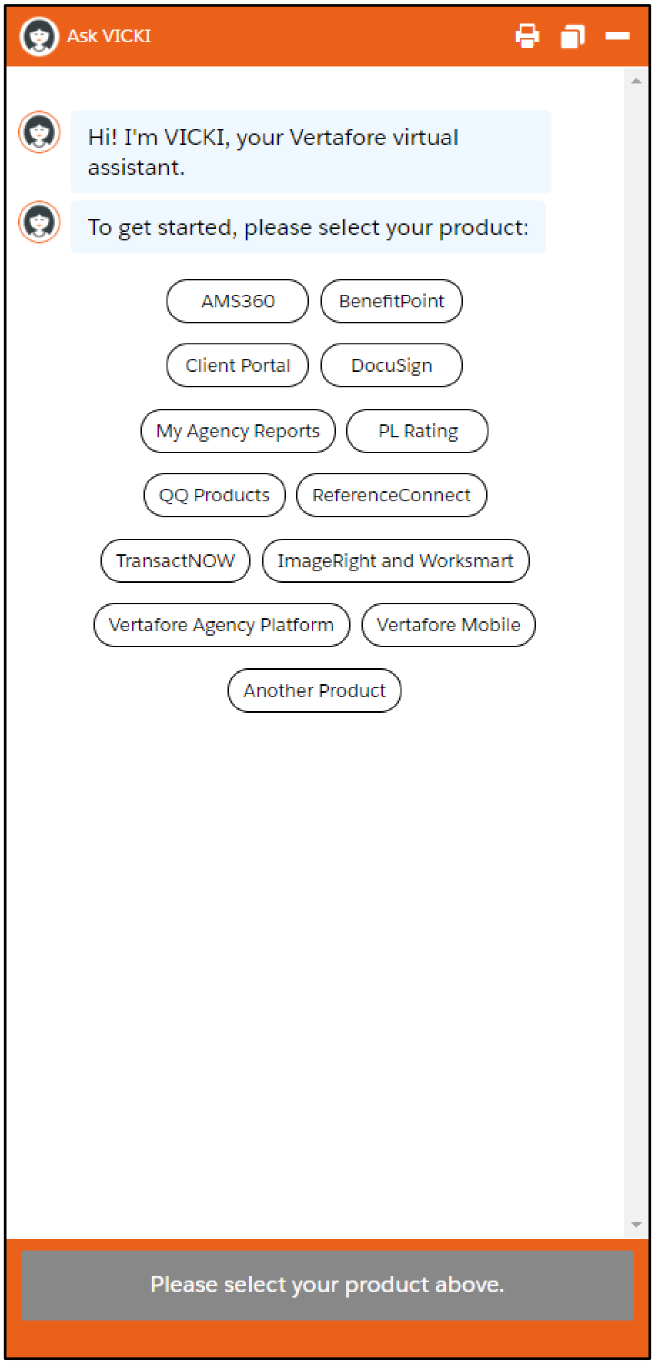
Search the KnowledgeBase

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.



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.