

Are you ready to get started with InsurLink?

Your dedicated Vertafore team will kick off your on-boarding and implementation soon after your decision to buy and will work alongside you to set up your InsurLink so you can begin driving success to your agency quickly. Here is just a glimpse of what your implementation will look like:

STEP 1

Give staff access to InsurLink

Through Vertafore Single Sign On (VSSO), you will grant InsurLink access to your employees with specified security selections. This will allow your agents to invite their clients to use InsurLink and further connect with them online.

STEP 2

Set up agency for InsurLink

The agency configuration for InsurLink is as simple as filling out seven tabs with all your agency's information and design preferences. In this step, you can make InsurLink your own by adding your social media accounts, your agency's website, choosing your color schemes, and build templates.

STEP 3

Set up the client for InsurLink access

Once you have completed your agency, you are ready to set up your clients for InsurLink. Here, you will add your clients as InsurLink users to send them invitations and manage their permissions so you can assure your clients are getting the utmost personalized service.

Use your resources!

Once you have completed those three steps with your Implementation Consultant, you are ready to use InsurLink! After your implementation, you will be equipped with an InsurLink Support team as well as additional resources to help you with any of your InsurLink needs.

If you have any questions or would like to further discuss implementing InsurLink, **please contact your Account Manager.**