



# TransactNOW for Agencies

## TransactNOW for Agencies

With a combination of real-time transaction workflow and instant sign-on to carrier websites, TransactNOW® enables you to securely process business with carriers and service your customers in real time, without ever leaving your agency management system.

## Your Real-Time Partner

A practical real-time carrier interface is critical to your sales success. That's why Vertafore expanded the functionality of TransactNOW to include seamless real-time quoting and new business submission workflow for multiple carriers. With TransactNOW the inefficiencies of carrier website navigation and multiple password management are a thing of the past. With a single click, you can access carrier website features right from your agency management system, without interrupting your workflow or manually logging in.

## Instant Sign On to Carrier Websites

Connecting with the rich functionality of carrier websites when you need to is important to your business. TransactNOW is a true breakthrough in automated sign-on to carrier websites. It eliminates the need to remember and re-enter passwords. Now you can move in and out of websites with a single click.

### Key Features:

- Endorsement processing
- Multi-carrier commercial submissions
- Personal and commercial new business submissions
- Comprehensive billing
- Claims
- Policy-view inquiries

### TransactNOW® provides:

- Efficient, single-entry transaction processing with multiple carriers
- Real-time access to the most current and accurate customer policy data
- Seamless workflow integration with carrier website features



**“Our CSRs take the customer’s call, click button, and immediately go to the carrier’s website and get the answer while the customer is still on the phone.”**

**Carl Schlotman III,**  
*President, CAI Insurance*

[Visit for more info](#)

or call 800.444.4813

## Improved Client Service

The faster you can communicate with carriers from within your system, the easier it becomes to service your clients. TransactNOW is designed with this single goal in mind—to improve your bottom line through streamlined agency/carrier workflow. And it does exactly that. TransactNOW puts you in direct, real-time contact with a carrier's online processing system. With minimal keystrokes, you can retrieve billing, claims, and policy information immediately from the carrier database and display it on your system, allowing you to answer client inquiries within seconds. You can process endorsements immediately, as well as quote and submit, both personal and commercial lines policies with no duplicate data entry. You never leave your agency management system to access the information you need to provide superior client service.



## Carrier Commitment

The carrier community is committed to making it easier for agents to work with them, so they have been quick to recognize the mutual benefits provided to both them and their agents, by embracing TransactNOW. The number of carriers and transactions connected through TransactNOW continues to grow rapidly.

## Get TransactNOW in Two Easy Steps:

1. Download TransactNOW and the user manual from [transactnow.com](http://transactnow.com) then follow the simple instructions for installing and configuring the software.
2. Enter your carrier website user IDs and passwords into the secure credential store. Password management with TransactNOW is flexible, so you can choose the way you want to manage passwords in your agency—they can be managed by an administrator (or multiple administrators) or by individual users. It's your choice.



**“With TransactNOW, our CSRs and account managers can market multiple accounts. They can now log in, input information, and get quotes from five or six different carriers with one click, where this used to take an experienced CSR ten minutes per carrier site. TransactNOW completely eliminates duplicate entry. They can get five quotes in the time it used to take them to get one.”**

**Tim Baxley,**  
*Agency Principal, Statewide Insurance*

Visit for more info

or call 800.444.4813