

Seamless, efficient, and secure book rolls

Whether you're focused on offering new lines of business, expanding current markets, appointing a new agency, or expanding into a new state, Book Roll simplifies the process of evaluating agency books so that you can focus on more important activities.

Features you need

Analyze books from any management system

With Vertafore's Book Roll, you can digitally request a book of business from any agency partner. Agencies can then easily send you their books within minutes — via ACORD AL3 or XML standard files or directly from their AMS360 or Sagitta management systems. Imported data is automatically normalized for viewing and reporting.

Report on what matters

When you assess risk with Book Roll, you have detailed, accurate reports on agency books and policies you want including:

- **Health of Book:** A high-level summary of the makeup of the book including number of policies, premiums, and line of business specific information such as vehicles, age ranges, and much more, to help quickly determine if the policies in the book meets expectations.
- **Policy Detail:** An extract of all policy detail received from a book roll, to help you easily slice and dice data to determine which policies you are interested in.
- **Book Summary:** A representation of all requested/received books of business, as well as their current status.
- **Book Policy:** A high-level list of policies and named insureds from all requested/received books of business.

Rate and/or bridge to your portal

Book Roll integrates with Vertafore's Rating API, making it easy to compare your rates and coverages with the in-force policy. You can also take advantage of your own underwriting rules by sending data gathered through Book Roll to your rating systems, underwriting systems, and/or portal to decrease re-keying of data for your book roll team.

Lines supported by Book Roll

Personal Lines

- Auto
- Home
- Dwelling Fire
- Inland Marine
- Umbrella
- Watercraft
- Package

Commercial Lines

- Auto
- BOP
- GL
- Property
- Umbrella
- Workers Comp
- Inland Marine
- Package

"Vertafore's Book Roll, making the world better, one less click at a time!"

National Carrier

Contact us

or call 800.444.4813