upland InterFAX

Insurance Certificate Fax Distribution
Upland InterFAX and Vertafore Partnership

Upland InterFAX is an enterprise-class cloud fax solution that enables businesses to send and receive faxes easily, while meeting stringent business requirements and industry compliance standards.

Overview

Upland InterFAX is a trusted service provider for hundreds of thousands of users who send and receive over 100 million fax pages a year through our robust international network. InterFAX is the world's only PCI-DSS certified and HIPAA compliant API fax solution provider, and our adherence with global data security standards makes our solution the ideal pairing with AMS360.

Vertafore has integrated its AMS360 platform with InterFAX, which means all Vertafore subscribers can conveniently and securely fax insurance certificates directly from the general distribution list. Vertafore subscribers also benefit from InterFAX's secure email to fax solution, an added benefit that saves time and empowers workers to achieve more.

Big Benefits

- **Convenient:** fax certificates directly from your general distribution list
- **Secure:** fax communication is HIPAA and PCI-DSS compliant
- **Integrated:** send any document as an electronic fax via email or a special client portal
- **Versatile:** optional inbound service means you can receive faxes via email
- **Comprehensive:** receive confirmation on every fax sent, and automatically store it for later retrieval

AMS360
powered by **Vertafore**

Ease of Use
InterFAX seamlessly integrates with AMS360 to enable users to communicate easily, reliably, and cost-effectively.

Empowered Staff
Bulk distributions can be sent by multiple users simultaneously, streamlining processes and saving time without tying up a phone line.
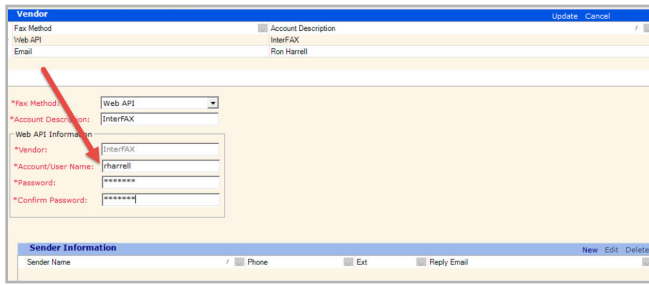
Reliable Data Security
Deliver secure, cloud-based, enterprise-grade faxes and documents while meeting rigorous industry compliance standards.
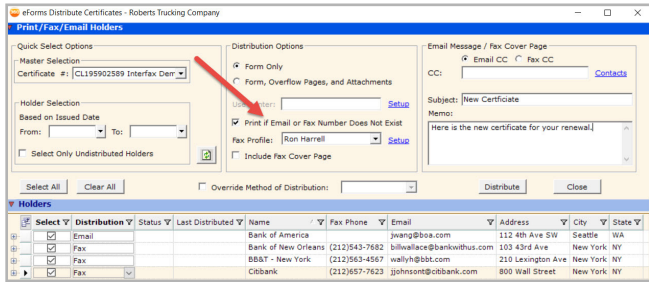
Improved Business Efficiency
InterFAX allows clients to smoothly migrate from on-premise fax to a secure, auditable cloud fax and distribution solution. Port in your existing fax number to ensure continuity for clients.

Paired with AMS360, InterFAX offers reliable solutions to streamline work, save time, and ensure secure processes around the bulk distribution of documents for busy workers. Learn more at **uplandsoftware.com/InterFAX**.
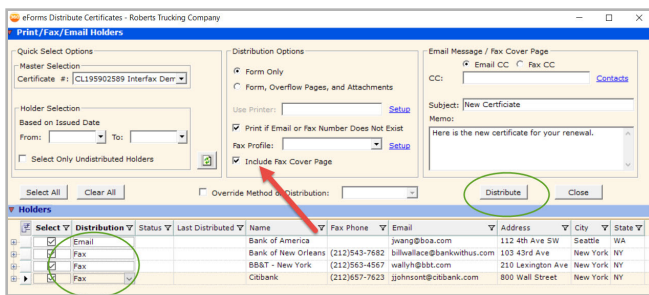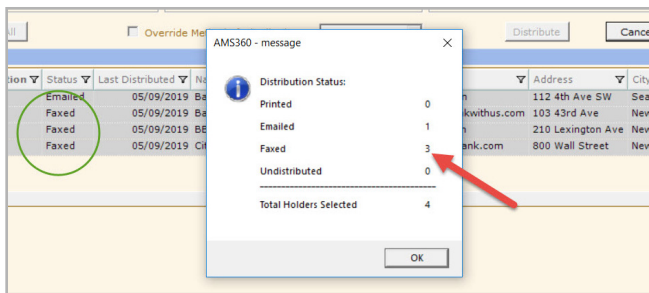
Getting Started

Using the "Fax Profile Setup" screen, each AMS360 user can set up a general agency profile or a personalized profile, depending on their needs.

After each Certificate Holder is selected, the system will display the entire list and create the individual certificates. The red arrow indicates where the user chooses their own fax profile. Each Certificate Holder can define whether they prefer to receive a printed copy, a fax, or an email.

Once the user has chosen their fax profile, they can easily create an email greeting or fax cover page and edit distribution details for recipients, if necessary. Once all choices have been determined, emails and faxes are securely and automatically sent from the system simply by clicking "distribute".

Upon completion, the user gets visual verification that the certificate was sent to all recipients using the methods selected (email, fax, or print). A full record of every transaction is also automatically routed to the customer's activity file for secure storage and later reference.

Ready to Learn More?

Visit us and schedule a demo at uplandsoftware.com/InterFAX

About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.

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