Sagitta®
powered by Vertafore

The enterprise-class agency management system for your business.

As a large business, you have different challenges and goals than local independent agencies. Your technology systems should focus on solving your unique pain points.

Sagitta is built to support your specialty lines and scale with your growing business - whether you're growing organically or through acquisition.

Personalized Based on Your Processes

Your technology should support your agency's internal processes and work style – not the other way around. Sagitta is built for personalization, so you can tailor it to your processes and procedures already in place, including forms, fields, and accounting. It also allows for greater flexibility at the user and agency level.

Secure Your Data

Your data is one of your most important assets – so it's imperative you secure it. With Sagitta, you can grant or restrict access to sensitive information via roles that include configuration options to view, modify, or delete data. Audit trails can track events, including login activity and significant actions performed by users, so you have a holistic view of all activity as it relates to security.

> "We did an extensive search, and honestly, Vertafore had the only system that could effectively serve a 100-person agency."
>
> **Susan Stoddard**, *Systems Manager, Moreton & Company*

Advanced Accounting to Fit Your Needs

Accounting is a foundational need that can often be one of the most complex and time-consuming tasks for your staff. Sagitta offers advanced accounting capabilities that fit your needs, including:

- **Complete interdivisional postings:** All accounting transactions can be posted across multiple divisions and agency locations.
- **Automated direct bill reconciliation:** Ability to create a new invoice or match to an existing invoice, which provides significant time savings.
- **Detailed payables process:** Itemize payables and associate itemization with a single check.
- **Agency bill installment invoicing:** Simplified process for an insured to request the agency change schedules mid-term, as well as pre-define or create ad-hoc installment schedules.

Sagitta Core Customization Capabilities:

- User-defined fields and files.
- Quick-entry fields.
- Personalized navigation menus.
- Grid display.

Contact Us

or call 800.444.4813

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