



# Budgeting, Forecasting, and Financial Reporting for **Vertafore Solutions**

## Prophix for Sagitta and AMS360

### Automate Financial Processes, Reduce Risk, and Improve Profitability with Prophix

Prophix's Corporate Performance Management (CPM) software is an easy-to-use and powerful solution designed to support the needs of today's leading insurance businesses.

Prophix seamlessly integrates with your Vertafore solution, unifying relevant information to help you make better business decisions.

Reduce risk and save time by moving away from manual, spreadsheet-based processes.

Drill-down to customized reports and transactional-level details with easy-to-use dashboards. Automate your financial processes, assign tasks, and distribute reports to your stakeholders with Prophix's powerful workflow engine.

“Prophix has taken an extremely manual month-end close and financial reporting process and made it very streamlined. Ad hoc reports and office-level financials can now be prepared with the click of a few buttons instead of manual preparation.”

— Assistant Controller, Higginbotham Insurance Agency



# Move Beyond Excel & Drive Performance

Insurance companies can make informed, strategic decisions by leveraging Prophix to:

- ▶ Customize dashboards for every stakeholder with key metrics and drill-down detail
- ▶ Collaboratively plan and budget across business units
- ▶ Model driver-based revenues and expenses
- ▶ Automate financial processes with powerful built-in workflows
- ▶ Fully customize reports to meet GAAP and regulatory requirements
- ▶ Manage risk with what-if forecasts and modeling
- ▶ Enable users with a simple browser-based interface
- ▶ Easily implement and maintain solutions with limited IT involvement

## Prophix Customers



Bowen Insurance Agency



Miclette & Britt



The Partners Group



Baldwin Risk Partners



Higginbotham Insurance Agency

## About Prophix

Your business is evolving. And the way you plan and report on your business should evolve too. Prophix helps mid-market companies achieve their goals more successfully with innovative, cloud-based Corporate Performance Management (CPM) software. With Prophix, finance leaders improve profitability and minimize risk by automating budgeting, forecasting and reporting and puts the focus back on what matters most – uncovering business opportunities. Prophix supports your future with AI innovation that flexes to meet your strategic realities, today and tomorrow. Over 1,500 global companies rely on Prophix to transform the way they work.

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