Sircon Producer Manager and Producer Express 9.7 Production Release Notes
March 29, 2019

Vertafore is pleased to release Sircon Producer Manager and Producer Express v.9.7 to the Production environment. Additional details will follow.

With each release, we are incrementally improving and updating Producer Express and Producer Manager to provide you with the best possible experience.

QUESTIONS

If you encounter any problems or have questions concerning this release, contact Vertafore Customer Support by using one of the following methods:

- Call us at (877) 876-4430
- Email us at plmsupport@vertafore.com
- Login to the self-service portal at https://support.vertafore.com/vf_VertaforeLogin

WHAT'S NEW

The following are detailed descriptions of the specific enhancements in this UAT release:

Feature	Description
Include Business Unit – Producer Relationship Information in the Interactive Reporting Data Model	The following Business Unit to Producer Relationship fields were added to the Producer Business Unit section of Interactive Reporting • Producer's Business Unit Status Code • Producer's Business Unit Status • Producer's Business Unit End Date • Producer's Business Unit Begin Date
New Producer Appointment template for Producer Manager Interactive Reporting	A new "Producer Appointments" template has been added when creating new templates in Interactive Reporting. This template indicates which producers have active appointments and can be customized using the report designer. The "Producer Appointments" template includes a prompt (and filter) on active appointments and the following fields: • Name

Feature	Description
	- NPN - External System Identifier - Resident State - Business Unit - Producer Status - NAIC # - Appointed State - Appointment Type - Appointment Status - Active Date of Appointment - Termination Date of Appointment - Termination Reason - Record Only Indicator - State Verified Indicator - License Number - License Type
Resolved Error on the Interactive Reporting Dashboard when Using IE 11	Resolved an issue which caused an error message ("Something unexpected happened while processing your data") on the Interactive Reporting Dashboard when using IE 11.