



POWERING  
YOUR  
POSSIBLE.

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# SIRCON FOR CARRIERS

**Maintain Business Units  
and Cost Centers**

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## Overview

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### Introduction and Background

In Sircon for Carriers, you have several options to categorize the producers in your organization. The main ways to organize producers are using:

- Business Units
- Cost Centers
- Locations and Departments

**Business units** are used to group producers (both individuals and firms) into logical or physical divisions for easier tracking, maintenance, and reporting.

**Cost centers** are used to link the cost of a particular transaction type to an accounting category or "cost center." For example, you can create a cost center for all Property & Casualty license and appointment fees.

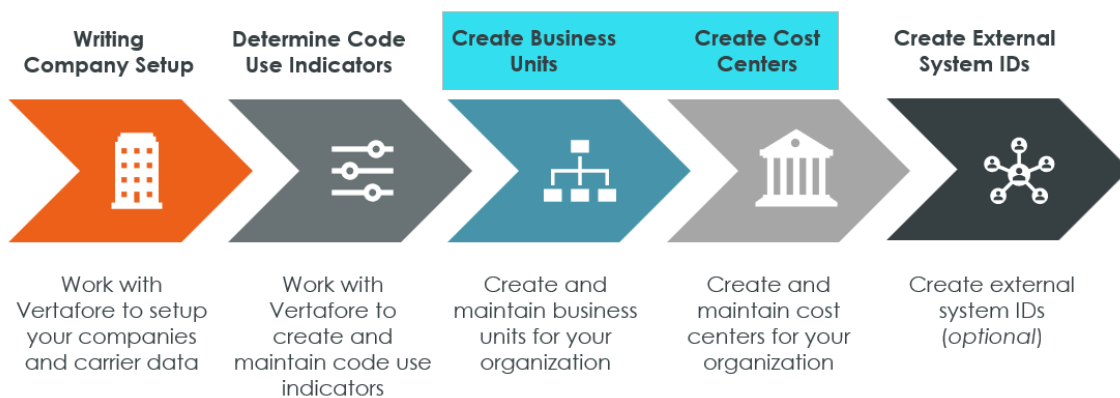
You can design the Sircon business units/cost centers to model your organization's existing departments and cost centers.

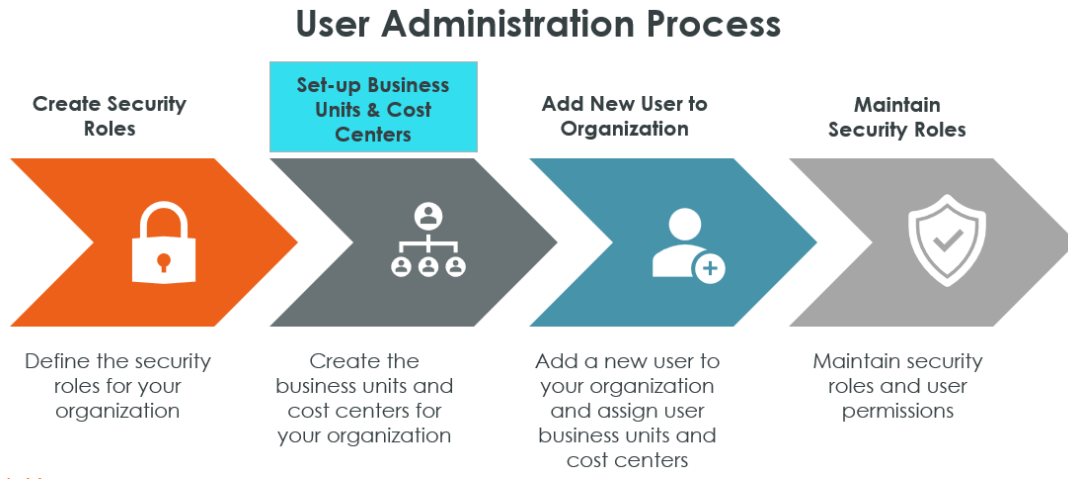
Business units and cost centers are required to complete several functions in Producer Central, including:

- License Applications
- Sales Authorizations
- Appointments
- Terminations

In the charts below, you can see that the business unit and cost center creation is a step in the Initial Sircon Administration Process and the User Administration Process.

### Initial Sircon Administration Process





You can also use **Locations & Departments** to create a list of the different locations (cities, states, regions, or countries) where producers are located. You can also create different departments (such as Sales or Customer Support) to further categorize the producers in your organization. Unlike business units and cost centers, **the locations and departments feature is optional.**

**Note:** For information about how to maintain locations and departments, refer to the [Locations and Departments Quick Guide](#).

### What will be covered?

In this quick guide, we will discuss how to categorize producers in your organization using:

- Business Units
- Cost Centers

We will describe how to create and maintain business units and cost centers. Then we will explore how to assign users and producers to business units.

### Who should use this document?

Any users that need to create and maintain business units or cost centers in Producer Central.

This guide can also be used by individuals that need to assign producers to business units.

**Note:** Users need administrative access to create business units and cost centers.

**When should you use this document?**

Use this document when you need to:

- Learn the difference between business units and cost centers
- Create or Maintain Business Units and Cost Centers
- Assign Users to Business Units and Cost Centers
- Assign Producers to Business Units

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## **Configuring Your Organization**

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**Business Units**

Business units are used to group producers (both individuals and firms) into logical or physical divisions for easier tracking, maintenance, and reporting. Business units are required to complete several transactions in Producer Central (such as Appointments and License Applications).

You can assign producers into multiple business units depending on the business needs. A business unit may also contain more granular divisions, or sub-codes.

**Note:** If you don't want to create multiple business units, you can use the "DEFAULT" business unit.

**BUSINESS UNIT EXAMPLES****Product Line**

<b>Business Unit Name</b>	<b>Business Unit Short Name</b>
<b>Property &amp; Casualty</b>	PC
<b>Accident</b>	ACC
<b>Life</b>	LIFE
<b>Annuities</b>	ANN

**Geographic Locations**

<b>Business Unit Name</b>	<b>Business Unit Short Name</b>
<b>Northeast</b>	NE
<b>South</b>	STH
<b>Northwest</b>	NW
<b>Midwest</b>	MW

### Distribution Channels

Business Unit Name	Business Unit Short Name
<b>Captive Agent</b>	CAGT
<b>Direct Agent</b>	DAGT
<b>Captive Agency</b>	CAGY
<b>Direct Agency</b>	DAGY

### Cost Centers

In the Sircon Platform, the cost of a particular transaction type is associated with an accounting category or "cost center."

You can tie one or multiple cost centers to a single business unit, allowing a user associated with the business unit who is submitting a transaction to select a cost center to which to assign the transaction's cost.

#### BUSINESS UNIT AND COST CENTER EXAMPLES

Here are some examples of the ways you could organize your cost centers and business units.

#### Line of Authority and Transaction Type

Business Unit Name	Business Unit Short Name	Cost Center
<b>Property &amp; Casualty</b>	PC	License Transactions
<b>Property &amp; Casualty</b>	PC	Appointment Fees
<b>Property &amp; Casualty</b>	PC	Maintenance Fees
<b>Life &amp; Health</b>	LIFE	License Transactions
<b>Life &amp; Health</b>	LIFE	Appointment Fees

#### Geographic Region & Line of Authority

Business Unit Name	Business Unit Short Name	Cost Center
<b>Northeast</b>	NE	P&C
<b>Northeast</b>	NE	Life & Health
<b>South</b>	STH	P&C
<b>South</b>	STH	Life & Health
<b>Northwest</b>	NW	P&C
<b>Northwest</b>	NW	Life & Health

#### Distribution Channel and Geographic Regions

Business Unit Name	Business Unit Short Name	Cost Center
<b>Captive Agent</b>	CAGT	Northeast
<b>Captive Agent</b>	CAGT	Midwest
<b>Captive Agent</b>	CAGT	Northwest

## Section: Configuring Your Organization

<b>Captive Agency</b>	CAGY	Northeast
<b>Captive Agency</b>	CAGY	Midwest
<b>Captive Agency</b>	CAGY	Northwest

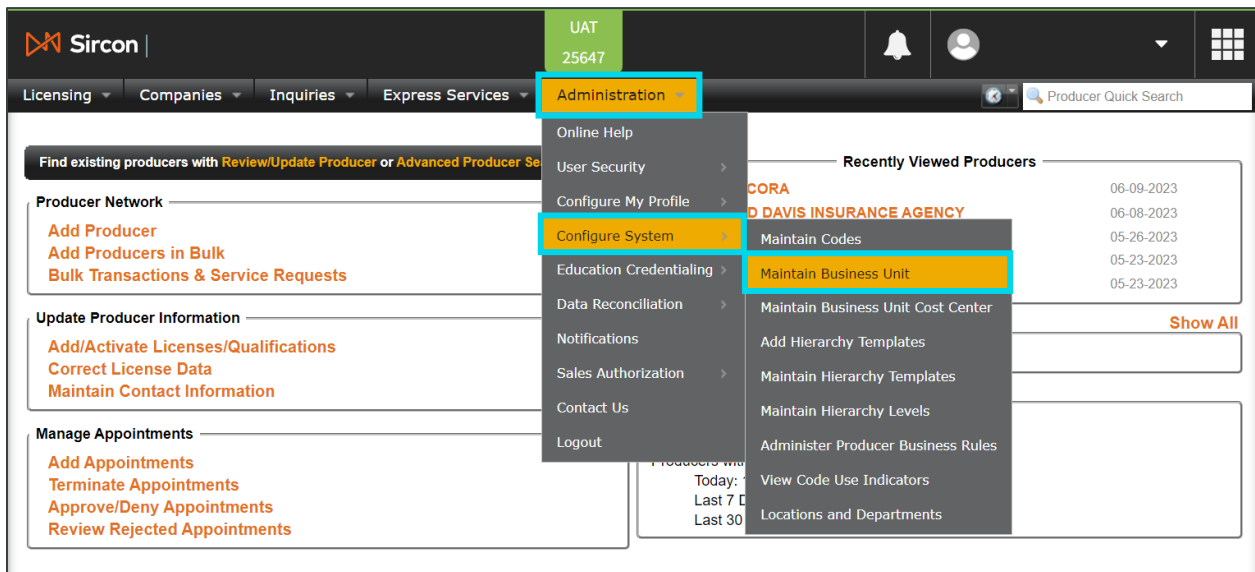
Your account can choose to organize business units and cost centers in whatever way makes most sense for your business. If you have existing cost centers or business units, you can recreate them in Sircon Producer Central to make reporting easy.

## Maintain Business Unit

If you have administrative permissions, use the *Maintain Business Unit* page to configure a business unit in the system.

You can also inactivate a business unit and thereby disassociate all staff member users and producers with the business unit.

- To open the *Maintain Business Unit* page, from the **Administration** menu select **Configure System**, and then select **Maintain Business Unit**.



The screenshot shows the Sircon user interface. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The 'Administration' menu is open, showing options like 'Online Help', 'User Security', 'Configure My Profile', 'Configure System', 'Education Credentialing', 'Data Reconciliation', 'Notifications', 'Sales Authorization', 'Contact Us', and 'Logout'. The 'Configure System' option is highlighted, and its sub-menu is open, showing 'Maintain Business Unit' as the selected option. The background shows a 'Producer Network' section with options like 'Add Producer', 'Add Producers in Bulk', and 'Bulk Transactions & Service Requests'. A 'Recently Viewed Producers' table is also visible, listing producers like 'CORAL' and 'D DAVIS INSURANCE AGENCY' with their last viewed dates.

- You will now see all the business units within your organization. Here are the fields displayed in the table:
  - **BU Name:** Full name of the business unit.
  - **Short Name:** Short Name of the business unit
  - **Status:** Current status of the business unit.
    - **Active** indicates that the business unit is currently available to configure.
    - **Inactive** indicates that the business unit is currently unavailable to configure.
  - **Begin Date:** Date on which the business unit **Status** most recently became Active in the system.
  - **End Date:** Date on which the business unit **Status** most recently became Inactive in the system.
  - **Actions:** Click the **Edit** button (✎) to update the business unit information or inactivate the business unit.



Section: Maintain Business Unit

## Create a New Business Unit

1. Click the **Add a New Business Unit** button.

Maintain Business Unit						<a href="#">Add a New Business Unit</a>
BU Name	Short Name	Status	Begin Date	End Date	Actions	
DEFAULT	DEFAULT	Active	03-22-2010			
Health	HEALTH	Active	02-09-2022			
LansingMichigan	LM	Active	11-07-2022			
LansingTexas	LT	Active	11-03-2022			
Life and Annuity	LIFE	Active	05-08-2020			
New York	NY	Inactive	02-10-2022	02-10-2022		
North East	NE	Active	02-10-2022			
Personal / Commercial	PC	Active	05-08-2020			
SFC BU Test	SFCBU	Active	03-01-2021			
SFC Business Unit	BUSFC	Active	08-09-2022			
SFCBU_New	NEWBU	Active	08-23-2022			
South West	LUV	Active	02-10-2022			

**Key:** = Edit Business Unit

12 business units found, displaying all business units.

2. The *Add Business Unit* popup will appear. Enter the **Begin Date**, **BU Name**, and the business unit **Short Name**.
3. Click **Save**.

Maintain Business Unit						<a href="#">Add a New Business Unit</a>																																																																								
<div style="border: 1px solid gray; padding: 5px;"> <p><b>Add Business Unit</b> <span style="float: right;">✕</span></p> <p><b>Begin Date:</b> <input type="text" value="06-12-2023"/> <b>End Date:</b> <input type="text"/> <i>Status: Active</i></p> <p><b>BU Name:</b> <input type="text" value="North West"/> <b>Short Name:</b> <input type="text" value="NW"/></p> <p style="text-align: right;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div>																																																																														
<table border="1"> <thead> <tr> <th>BU Name</th> <th>Short Name</th> <th>Status</th> <th>Begin Date</th> <th>End Date</th> <th>Actions</th> </tr> </thead> <tbody> <tr><td>DEFAULT</td><td>DEFAULT</td><td>Active</td><td>03-22-2010</td><td></td><td></td></tr> <tr><td>Health</td><td>HEALTH</td><td>Active</td><td>02-09-2022</td><td></td><td></td></tr> <tr><td>LansingMichigan</td><td>LM</td><td>Active</td><td>11-07-2022</td><td></td><td></td></tr> <tr><td>LansingTexas</td><td>LT</td><td>Active</td><td>11-03-2022</td><td></td><td></td></tr> <tr><td>Life and Annuity</td><td>LIFE</td><td>Active</td><td>05-08-2020</td><td></td><td></td></tr> <tr><td>New York</td><td>NY</td><td>Inactive</td><td>02-10-2022</td><td>02-10-2022</td><td></td></tr> <tr><td>North East</td><td>NE</td><td>Active</td><td>02-10-2022</td><td></td><td></td></tr> <tr><td>Personal / Commercial</td><td>PC</td><td>Active</td><td>05-08-2020</td><td></td><td></td></tr> <tr><td>SFC BU Test</td><td>SFCBU</td><td>Active</td><td>03-01-2021</td><td></td><td></td></tr> <tr><td>SFC Business Unit</td><td>BUSFC</td><td>Active</td><td>08-09-2022</td><td></td><td></td></tr> <tr><td>SFCBU_New</td><td>NEWBU</td><td>Active</td><td>08-23-2022</td><td></td><td></td></tr> <tr><td>South West</td><td>LUV</td><td>Active</td><td>02-10-2022</td><td></td><td></td></tr> </tbody> </table> <p><b>Key:</b>  = Edit Business Unit</p> <p>12 business units found, displaying all business units.</p>	BU Name	Short Name	Status	Begin Date	End Date	Actions	DEFAULT	DEFAULT	Active	03-22-2010			Health	HEALTH	Active	02-09-2022			LansingMichigan	LM	Active	11-07-2022			LansingTexas	LT	Active	11-03-2022			Life and Annuity	LIFE	Active	05-08-2020			New York	NY	Inactive	02-10-2022	02-10-2022		North East	NE	Active	02-10-2022			Personal / Commercial	PC	Active	05-08-2020			SFC BU Test	SFCBU	Active	03-01-2021			SFC Business Unit	BUSFC	Active	08-09-2022			SFCBU_New	NEWBU	Active	08-23-2022			South West	LUV	Active	02-10-2022		
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4. You will now see the business unit in the *Maintain Business Unit* page.














Maintain Business Unit						<a href="#">Add a New Business Unit</a>
BU Name	Short Name	Status	Begin Date	End Date	Actions	
DEFAULT	DEFAULT	Active	03-22-2010			
Health	HEALTH	Active	02-09-2022			
LansingMichigan	LM	Active	11-07-2022			
LansingTexas	LT	Active	11-03-2022			
Life and Annuity	LIFE	Active	05-08-2020			
New York	NY	Inactive	02-10-2022	02-10-2022		
North East	NE	Active	02-10-2022			
North West	NW	Active	06-12-2023			
Personal / Commercial	PC	Active	05-08-2020			


Section: Maintain Business Unit

## Edit or Inactivate a Business Unit

Follow this process to edit an existing business unit. You can also use this process to inactivate a business unit.

1. Click the **Edit** button (  ) next to the business unit you need to modify.

Maintain Business Unit						Add a New Business Unit
BU Name	Short Name	Status	Begin Date	End Date	Actions	
DEFAULT	DEFAULT	Active	03-22-2010			
Health	HEALTH	Active	02-09-2022			
LansingMichigan	LM	Active	11-07-2022			
LansingTexas	LT	Active	11-03-2022			
Life and Annuity	LIFE	Active	05-08-2020			
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North East	NE	Active	02-10-2022			
North West	NW	Active	06-12-2023			
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SFC Business Unit	BUSFC	Active	08-09-2022			
SFCBU_New	NEWBU	Active	08-23-2022			
South West	LUV	Active	02-10-2022			














**Key:**  = Edit Business Unit

13 business units found, displaying all business units.

2. You will see the *Edit Business Unit* popup appear.
3. From here you can edit the **BU Name**, **Begin Date**, or you can add an **End Date** to make the Business Unit inactive.

**Note:** If you inactivate a business unit, the business unit will be inactivated for all producers associated with the BU. If the business unit is marked as the default business unit for the producer, that preference will be removed.

4. Click **Save**.


Maintain Business Unit						Add a New Business Unit
BU Name	Short Name	Status	Begin Date	End Date	Actions	
DEFAULT	DEFAULT	Active	03-22-2010			
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SFC Business Unit	BUSFC	Active	08-09-2022			
SFCBU_New	NEWBU	Active	08-23-2022			
South West	LUV	Active	02-10-2022			

**Edit Business Unit** ✕

**Begin Date:**  **End Date:**  *Status: Inactive*

**BU Name:**  **Short Name:**

**Warning:** Inactivating a business unit will result in the inactivation of **all** producer business unit interests for this business unit. If a producer business unit was marked as 'Default', inactivating this business unit will remove that preference.

**Key:**  = Edit Business Unit

13 business units found, displaying all business units.

Section: Maintain Business Unit

5. The business unit update will appear on the *Maintain Business Unit* page.

<b>Maintain Business Unit</b>					
<a href="#">Add a New Business Unit</a>					
BU Name	Short Name	Status	Begin Date	End Date	Actions
DEFAULT	DEFAULT	Active	03-22-2010		
Health	HEALTH	Active	02-09-2022		
LansingMichigan	LM	Active	11-07-2022		
LansingTexas	LT	Active	11-03-2022		
Life and Annuity	LIFE	Active	05-08-2020		
New York	NY	Inactive	02-10-2022	02-10-2022	
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SFC Business Unit	BUSFC	Active	08-09-2022		
SFCBU_New	NEWBU	Active	08-23-2022		
South West	LUV	Active	02-10-2022		
<b>Key:</b> = Edit Business Unit					

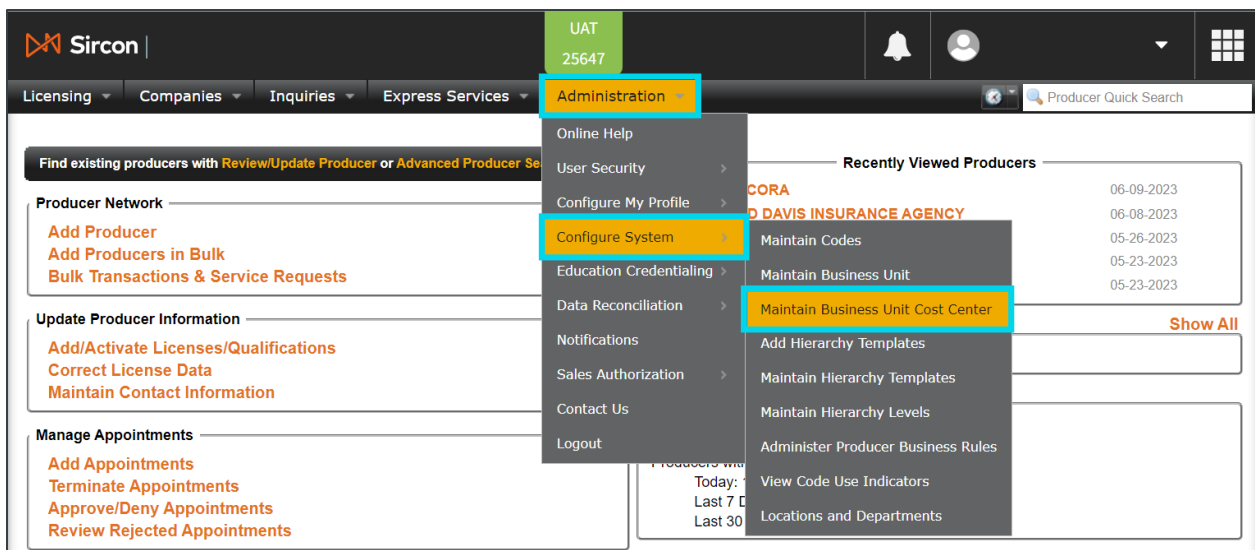
13 business units found, displaying all business units.

## Maintain Cost Center

The cost of a particular transaction type can be associated with an accounting category or "cost center." You can tie one or multiple cost centers to a single business unit, allowing a user assigned to the business unit and submitting a transaction to select a cost center to which to assign the transaction's cost.

If you have system administrator permissions, use the *Maintain Business Unit and Cost Center* page to view and manage cost centers associated with specific business units.

- From the **Administration** menu select **Configure System**, and then select **Maintain Business Unit and Cost Center**.



The screenshot shows the Sircon user interface. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The 'Administration' menu is open, showing options like 'Online Help', 'User Security', 'Configure My Profile', 'Configure System', 'Education Credentialing', 'Data Reconciliation', 'Notifications', 'Sales Authorization', 'Contact Us', and 'Logout'. The 'Configure System' option is highlighted, and its sub-menu is open, showing 'Maintain Codes', 'Maintain Business Unit', 'Maintain Business Unit Cost Center', 'Add Hierarchy Templates', 'Maintain Hierarchy Templates', 'Maintain Hierarchy Levels', 'Administer Producer Business Rules', 'View Code Use Indicators', and 'Locations and Departments'. The 'Maintain Business Unit Cost Center' option is highlighted. The background shows a 'Recently Viewed Producers' table with columns for producer name and date.

- You will now see the *Maintain Business Unit and Cost Center* page. Here you will see all the current business units and cost centers. This page displays the following fields:
  - BU Name:** Short name of the business unit associated with the cost center.
  - Cost Center Name:** Displays the name of the cost center.

Maintain Business Unit and Cost Center		
Current Business Units and Cost Centers		<a href="#">Add a New Business Unit and Cost Center</a>
Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	Accident 1
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	LT	AccidentCC

Section: Maintain Cost Center

### Add a New Cost Center

Follow this process to add a new business unit and cost center combination to your organization.

**Note:** You can assign multiple cost centers to the same business unit.

1. Click the **Add a New Business Unit and Cost Center** button.

#### Maintain Business Unit and Cost Center

**Current Business Units and Cost Centers**
Add a New Business Unit and Cost Center

Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	Accident 1
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	LT	AccidentCC

Delete
Cancel

**Note:** Deleting the last reference to a cost center will result in updating affected Data Reconciliation profiles to no longer have a default cost center. Additionally, the cost center will be removed from any producer business units currently associated with this cost center.

**Add Business Unit and Cost Center**
Clear

**BU Name**

**Cost Center Name**

Save
Return

2. In the *Add Business Unit and Cost Center* section, select the **Business Unit Name** from a drop-down list then type the **Cost Center Name**.
3. Click **Save**.

#### Maintain Business Unit and Cost Center

**Current Business Units and Cost Centers**
Add a New Business Unit and Cost Center

Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	AccidentCC
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	LT	Accident 1

Delete
Cancel

**Note:** Deleting the last reference to a cost center will result in updating affected Data Reconciliation profiles to no longer have a default cost center. Additionally, the cost center will be removed from any producer business units currently associated with this cost center.

**Add Business Unit and Cost Center**
Clear

**BU Name**

**Cost Center Name**

Save
Return

Section: Maintain Cost Center

- You will now see the cost center in the list.

### Maintain Business Unit and Cost Center

**Current Business Units and Cost Centers**
Add a New Business Unit and Cost Center

Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	Accident 1
<input type="checkbox"/>	LT	AccidentCC
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	NE	Maryland

Delete
Cancel

**Note:** Deleting the last reference to a cost center will result in updating affected Data Reconciliation profiles to no longer have a default cost center. Additionally, the cost center will be removed from any producer business units currently associated with this cost center.

**Add Business Unit and Cost Center**
Clear

**BU Name**

**Cost Center Name**

Save
Return

## Delete a Cost Center

Use these steps to remove a cost center from the system. Deleting the cost center will remove it from the producer's business units that are associated with the cost center. If the producer's default cost center is deleted, they will no longer have a default maintained in the system.

- Click the check box next to the **Cost Center** you need to remove then click the **Delete** button.

### Maintain Business Unit and Cost Center

**Current Business Units and Cost Centers**
Add a New Business Unit and Cost Center

Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	LT	AccidentCC
<input type="checkbox"/>	LT	Accident 1
<input type="checkbox"/>	NE	Maryland
<input checked="" type="checkbox"/>	NE	Delaware

Delete
Cancel

**Note:** Deleting the last reference to a cost center will result in updating affected Data Reconciliation profiles to no longer have a default cost center. Additionally, the cost center will be removed from any producer business units currently associated with this cost center.

**Add Business Unit and Cost Center**
Clear

**BU Name**

**Cost Center Name**

Save
Return

Section: Maintain Cost Center

- The cost center will be removed from the *Maintain Business Unit and Cost Center* page.

### Maintain Business Unit and Cost Center

**Current Business Units and Cost Centers**
Add a New Business Unit and Cost Center

Delete	BU Name	Cost Center Name
<input type="checkbox"/>	DEFAULT	12345
<input type="checkbox"/>	DEFAULT	48479
<input type="checkbox"/>	HEALTH	12345
<input type="checkbox"/>	LM	Fire Accident
<input type="checkbox"/>	LT	AccidentCC
<input type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	LT	Accident 1
<input type="checkbox"/>	NE	Maryland

**Note:** Deleting the last reference to a cost center will result in updating affected Data Reconciliation profiles to no longer have a default cost center. Additionally, the cost center will be removed from any producer business units currently associated with this cost center.

**Add Business Unit and Cost Center** Clear

**BU Name**

**Cost Center Name**

## Assign Users to a Business Unit and Cost Center

In this section, we will discuss how to assign business units and cost centers to a system user. Business unit and cost center assignments are required before users from your organization can complete transactions on behalf of producers.

For example, we set up Sircon for Carriers to have a Property & Casualty business unit. The cost centers are the resident states of the producers.

A user in the team needs to request a state appointment for a P&C producer in Maryland. In order for that user to complete the transaction, they will need the “Property & Casualty” business unit and the “Maryland” cost center assigned to them.

**Note:** Users with Administrative access can assign other users to business units and cost centers. For more information, refer to the [User Security Quick Guide](#).

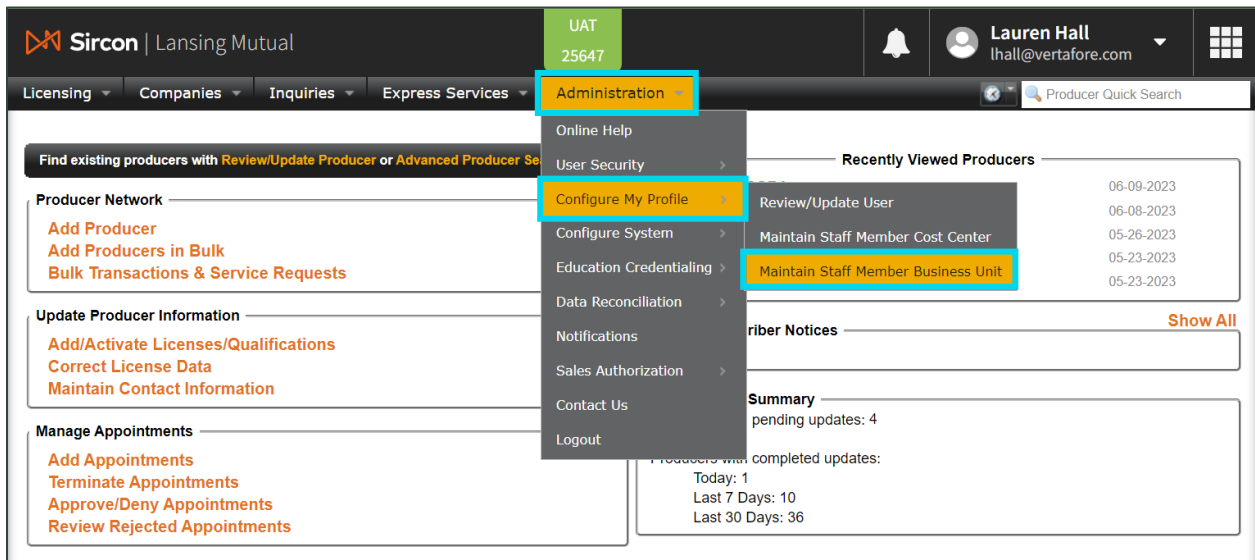
In this section, we will focus on how an individual user can assign themselves to a business unit and cost center.

### Business Unit Assignments

Follow these steps to add or edit your business unit assignments.

#### ADD USER TO BUSINESS UNIT

1. From the **Administration** menu select **Configure My Profile**, and then select **Maintain Staff Member Business Unit**.



The screenshot shows the Sircon Administration interface. The 'Administration' menu is open, and the 'Configure My Profile' option is highlighted. Within the 'Configure My Profile' sub-menu, the 'Maintain Staff Member Business Unit' option is highlighted. The background shows the main dashboard with various sections like 'Producer Network', 'Update Producer Information', and 'Manage Appointments'.



## Section: Assign Users to a Business Unit and Cost Center

- You will now see all the current business units in the *Maintain Staff Member Business Unit* page.
- At the top of the page, you will see the name of the **Staff Member** that you are updating.
- Click the **Add a New Business Unit** button.

### Maintain Staff Member Business Unit

Edit the business units for the user below

Staff Member		User Name				
Hall, Lauren		halla				
<b>Current Business Units</b>						<a href="#">Add a New Business Unit</a>
Business Unit Name	Status	Begin Date	End Date	Default	Actions	
BUSFC	Active	05-26-2023		<input type="checkbox"/>		
DEFAULT	Active	03-18-2022		<input type="checkbox"/>		
HEALTH	Active	05-26-2023		<input type="checkbox"/>		
LIFE	Active	05-26-2023		<input type="checkbox"/>		
LM	Active	05-26-2023		<input type="checkbox"/>		
LT	Active	05-26-2023		<input type="checkbox"/>		
LUV	Active	05-26-2023		<input type="checkbox"/>		
NE	Active	05-26-2023		<input type="checkbox"/>		
NEWBU	Active	05-26-2023		<input type="checkbox"/>		
PC	Active	05-26-2023		<input type="checkbox"/>		
SFCBU	Active	05-26-2023		<input type="checkbox"/>		
Key:  = Edit Business Unit						

- In the *Add/Update Business Unit* section, select the **BU Name** from the dropdown list and enter a **Begin Date**. You can also select the **Default** checkbox to make this the user's main business unit.
- If the user needs to work in all the business units, click **Add All Business Units**.
- Click **Save**.

Staff Member		User Name				
Hall, Lauren		halla				
<b>Current Business Units</b>						<a href="#">Add a New Business Unit</a>
Business Unit Name	Status	Begin Date	End Date	Default	Actions	
BUSFC	Active	05-26-2023		<input type="checkbox"/>		
DEFAULT	Active	03-18-2022		<input type="checkbox"/>		
HEALTH	Active	05-26-2023		<input type="checkbox"/>		
LIFE	Active	05-26-2023		<input type="checkbox"/>		
LM	Active	05-26-2023		<input type="checkbox"/>		
LT	Active	05-26-2023		<input type="checkbox"/>		
LUV	Active	05-26-2023		<input type="checkbox"/>		
NE	Active	05-26-2023		<input type="checkbox"/>		
NEWBU	Active	05-26-2023		<input type="checkbox"/>		
PC	Active	05-26-2023		<input type="checkbox"/>		
SFCBU	Active	05-26-2023		<input type="checkbox"/>		
Key:  = Edit Business Unit						
<b>Add/Update Business Unit</b>						<a href="#">Clear</a>
BU Name	Status	Begin Date	End Date	Default		
<input type="text" value=""/>	<input type="text" value="Active"/>	<input type="text" value="06-12-2023"/>	<input type="text" value=""/>	<input type="checkbox"/>		
<input type="button" value="Add All Business Units"/>						<input type="button" value="Save"/> <input type="button" value="Return"/>

Section: Assign Users to a Business Unit and Cost Center

EDIT BUSINESS UNIT ASSIGNMENT

Follow these steps to edit or inactivate a business unit assignment.

1. Click the **Edit** button (✎) next to the business unit you need to modify.

### Maintain Staff Member Business Unit

Edit the business units for the user below

Staff Member	User Name
Hall, Lauren	halla

Current Business Units					Add a New Business Unit
Business Unit Name	Status	Begin Date	End Date	Default	Actions
BUSFC	Active	05-26-2023		<input type="checkbox"/>	✎
DEFAULT	Active	03-18-2022		<input type="checkbox"/>	✎
HEALTH	Active	05-26-2023		<input type="checkbox"/>	✎
LIFE	Active	05-26-2023		<input type="checkbox"/>	✎
LM	Active	05-26-2023		<input type="checkbox"/>	✎
LT	Active	05-26-2023		<input type="checkbox"/>	✎
LUV	Active	05-26-2023		<input type="checkbox"/>	✎
NE	Active	05-26-2023		<input type="checkbox"/>	✎
NEWBU	Active	05-26-2023		<input type="checkbox"/>	✎
PC	Active	05-26-2023		<input type="checkbox"/>	✎
SFCBU	Active	05-26-2023		<input type="checkbox"/>	✎

Key: ✎ = Edit Business Unit

Add/Update Business Unit					Clear
BU Name	Status	Begin Date	End Date	Default	
<input type="text" value="LUV"/>	<input type="text" value="Active"/>	<input type="text" value="06-12-2023"/>	<input type="text"/>	<input type="checkbox"/>	

Add All Business Units Save Return

2. Update the necessary information, such as the **Begin Date** or the **Default** checkbox. You can also change the **Status** to Inactive and update the **End Date** to reflect that the business unit is no longer active for the users.
3. Click **Save**.

Current Business Units					Add a New Business Unit
Business Unit Name	Status	Begin Date	End Date	Default	Actions
BUSFC	Active	05-26-2023		<input type="checkbox"/>	✎
DEFAULT	Active	03-18-2022		<input type="checkbox"/>	✎
HEALTH	Active	05-26-2023		<input type="checkbox"/>	✎
LIFE	Active	05-26-2023		<input type="checkbox"/>	✎
LM	Active	05-26-2023		<input type="checkbox"/>	✎
LT	Active	05-26-2023		<input type="checkbox"/>	✎
LUV	Active	05-26-2023		<input type="checkbox"/>	✎
NE	Active	05-26-2023		<input type="checkbox"/>	✎
NEWBU	Active	05-26-2023		<input type="checkbox"/>	✎
PC	Active	05-26-2023		<input type="checkbox"/>	✎
SFCBU	Active	05-26-2023		<input type="checkbox"/>	✎

Key: ✎ = Edit Business Unit

Add/Update Business Unit					Clear
BU Name	Status	Begin Date	End Date	Default	
<input type="text" value="LUV"/>	<input type="text" value="Inactive"/>	<input type="text" value="05-26-2023"/>	<input type="text" value="06-12-2023"/>	<input type="checkbox"/>	

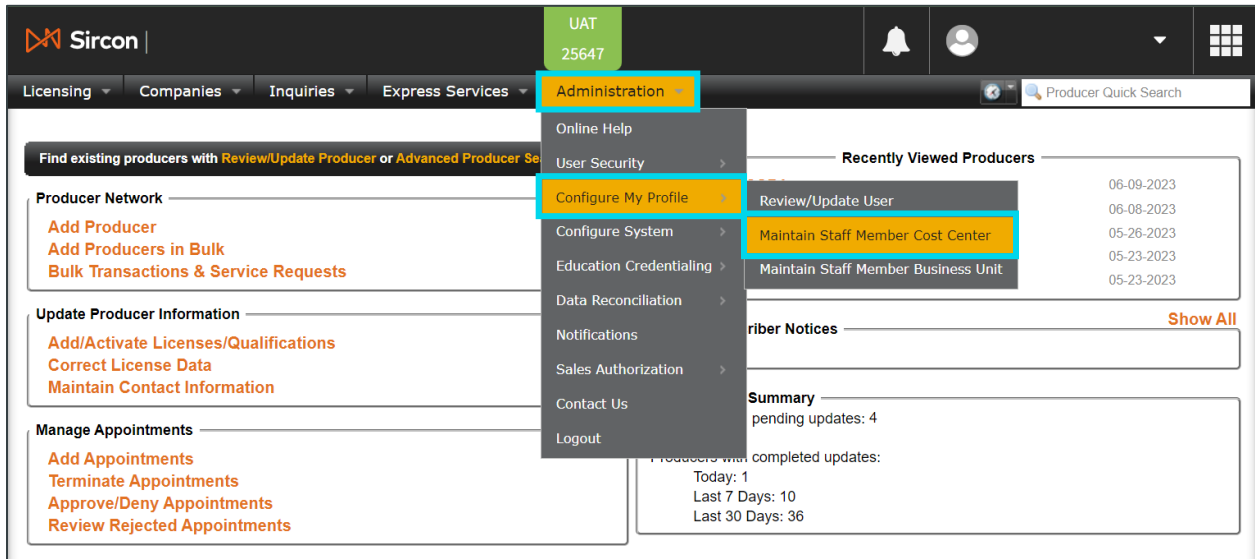
Add All Business Units Save Return

Section: Assign Users to a Business Unit and Cost Center

## Add Users to Cost Centers

Follow these steps to add or edit your cost center assignments.

1. From the **Administration** menu select **Configure My Profile**, and then select **Maintain Staff Member Cost Center**.

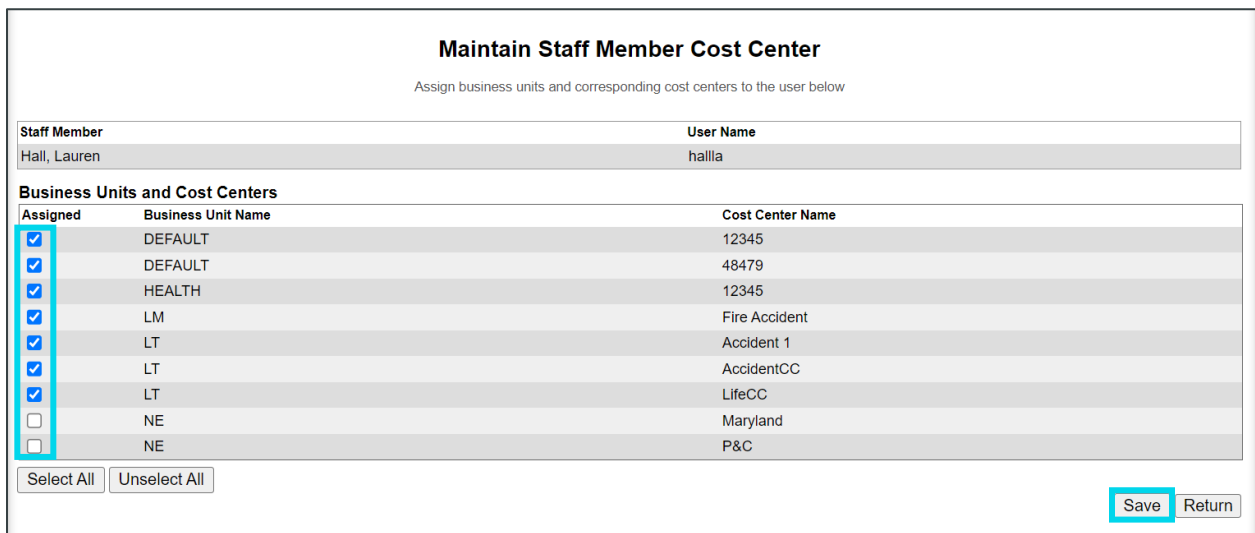


The screenshot shows the Sircon user interface. The 'Administration' menu is open, and 'Configure My Profile' is selected. Within this submenu, 'Maintain Staff Member Cost Center' is highlighted. The background shows the 'Recently Viewed Producers' table with columns for producer name and date.

Producer Name	Date
Review/Update User	06-09-2023
Maintain Staff Member Cost Center	06-08-2023
Maintain Staff Member Business Unit	05-26-2023
	05-23-2023
	05-23-2023

2. Click the check box next to the business unit and cost center you want to assign to the staff member.
3. Click **Save**.

**Note:** You can also click the **Select All** button to add all the cost centers.



The screenshot shows the 'Maintain Staff Member Cost Center' page. It includes a header for the staff member 'Hall, Lauren' and a table of business units and cost centers. The 'Assigned' column has checkboxes, with the first seven checked. 'Select All' and 'Unselect All' buttons are at the bottom left, and 'Save' and 'Return' buttons are at the bottom right.

Assigned	Business Unit Name	Cost Center Name
<input checked="" type="checkbox"/>	DEFAULT	12345
<input checked="" type="checkbox"/>	DEFAULT	48479
<input checked="" type="checkbox"/>	HEALTH	12345
<input checked="" type="checkbox"/>	LM	Fire Accident
<input checked="" type="checkbox"/>	LT	Accident 1
<input checked="" type="checkbox"/>	LT	AccidentCC
<input checked="" type="checkbox"/>	LT	LifeCC
<input type="checkbox"/>	NE	Maryland
<input type="checkbox"/>	NE	P&C

## Assign Producers to Business Units

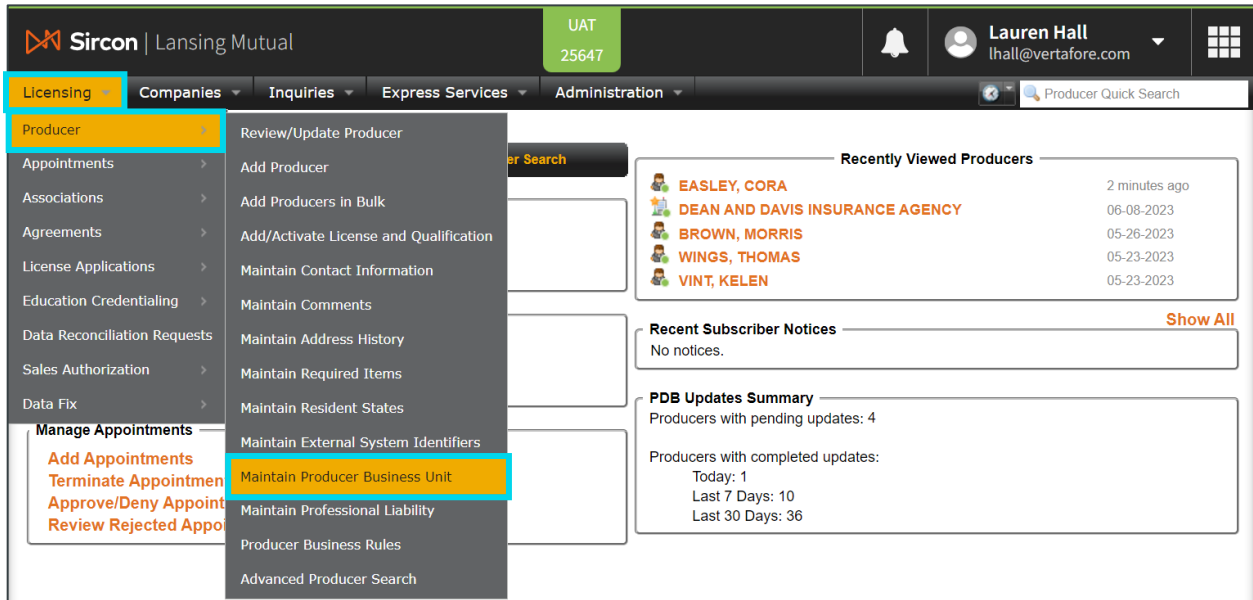
Follow these steps to assign producers to business units. You will need to assign a producer to a business unit and cost center before you can complete transactions (such as appointments and terminations) on behalf of the producer.

### Assign Producers to Business Units

Follow these steps to assign a producer to a business unit.

1. In the **Licensing** menu, click **Producer** then select **Maintain Producer Business Unit**.

**Note:** You can also assign business units from the producer record. You can use the **Producer Quick Search** to open the producer record and navigate to the Business Unit data section. For more information, refer to the [Maintain Producer Record Quick Guide](#).



The screenshot shows the Siron interface for Lansing Mutual. The top navigation bar includes 'Licensing', 'Companies', 'Inquiries', 'Express Services', and 'Administration'. The 'Licensing' menu is open, and the 'Producer' option is selected. A sub-menu is displayed with the following items: Review/Update Producer, Add Producer, Add Producers in Bulk, Add/Activate License and Qualification, Maintain Contact Information, Maintain Comments, Maintain Address History, Maintain Required Items, Maintain Resident States, Maintain External System Identifiers, **Maintain Producer Business Unit** (highlighted), Maintain Professional Liability, Producer Business Rules, and Advanced Producer Search. The main content area shows a 'Producer Quick Search' box, a 'Recently Viewed Producers' list with entries for EASLEY, CORA; DEAN AND DAVIS INSURANCE AGENCY; BROWN, MORRIS; WINGS, THOMAS; and VINT, KELEN. Below this are sections for 'Recent Subscriber Notices' (No notices) and 'PDB Updates Summary' (Producers with pending updates: 4; Producers with completed updates: Today: 1, Last 7 Days: 10, Last 30 Days: 36).

2. You will see the *Maintain Producer Business Unit* page.
3. Select if you need to search for an **Individual Licensee** or a **Firm** from the **Producer Type**.
4. Enter at least one of the search criteria to search for the producer you need to modify.
5. Click **Search**.

Section: Assign Producers to Business Units

### Maintain Producer Business Unit

Search Producer

Producer Type  Firm  Individual Licensee

Please enter at least one of the search criteria below:


Last	<input type="text" value="Easley"/>	First	<input type="text"/>	Middle	<input type="text"/>
SSN	<input type="text"/>	NPN	<input type="text"/>	Active Business Unit	<input type="text"/>
License Number	<input type="text"/>	License State	<input type="text"/>		
External System ID	<input type="text"/>	Primary External ID Only	<input type="checkbox"/>		

Records Per Page:  Search Cancel

6. Click the **Add New Business Unit** button.
7. Select the **Name** of the business unit you need to add.
8. Click **Save** or **Save and Return** to add the business unit to the producer record.

### Maintain Producer Business Unit

Search Producer



External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	<input checked="" type="checkbox"/> DEFAULT	1000000028	VA / 736178	<input checked="" type="checkbox"/> AZ / 1000000005

**Current Business Units** Add a New Business Unit

Name	Status	Begin Date	End Date	Default	Cost Center	Actions
DEFAULT	Active	05-25-2023		<input checked="" type="checkbox"/>		
PC	Active	06-01-2023		<input type="checkbox"/>		

Key: = Edit Producer Business Unit Return

---

**Add/Update Business Unit** Clear

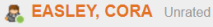
Name	Status	Cost Center	
<input type="text" value="NE"/>	<input type="text" value="Active"/>	<input type="text"/>	An inactive Business Unit cannot be marked default.

Save Return Save and Return

9. The business unit will appear in the *Current Business Units* section.

### Maintain Producer Business Unit

Search Producer



External System ID	Active BU	NPN	Resident State/License	Additional States/Licenses
	<input checked="" type="checkbox"/> DEFAULT	1000000028	VA / 736178	<input checked="" type="checkbox"/> AZ / 1000000005

**Current Business Units** Add a New Business Unit

Name	Status	Begin Date	End Date	Default	Cost Center	Actions
DEFAULT	Active	05-25-2023		<input checked="" type="checkbox"/>		
NE	Active	06-12-2023		<input type="checkbox"/>		
PC	Active	06-01-2023		<input type="checkbox"/>		

Key: = Edit Producer Business Unit Return

---

**Add/Update Business Unit** Clear

Name	Status	Cost Center	
<input type="text"/>	<input type="text" value="Active"/>	<input type="text"/>	An inactive Business Unit cannot be marked default.

Save Return Save and Return

---

## **APPENDIX 1: Sircon for Carriers Help Resources**

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Help is just a click away. Vertafore has two resources available to support you 24/7:

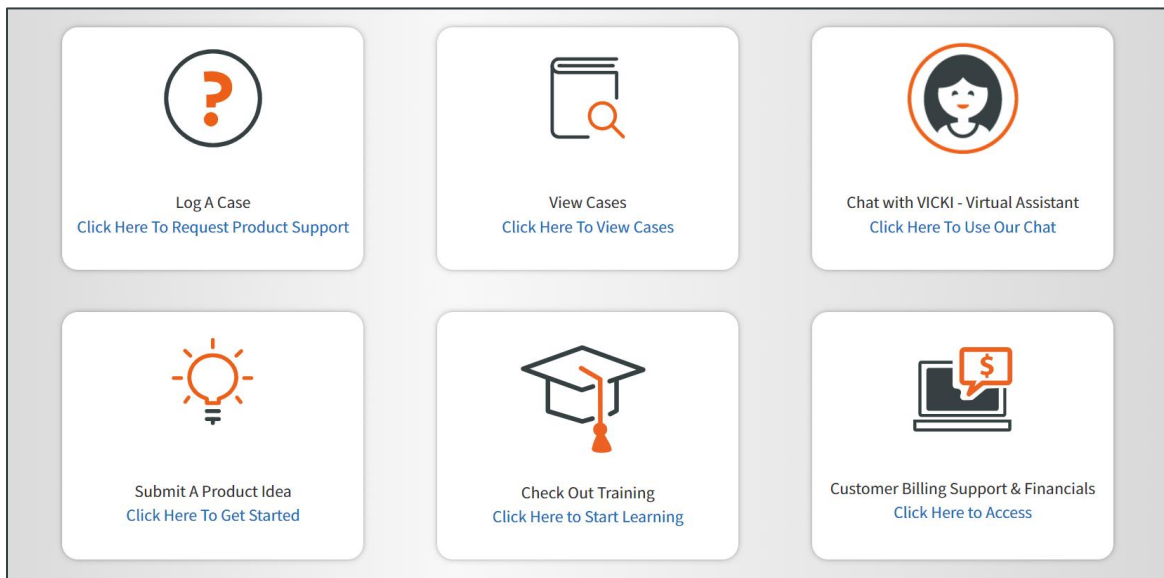
- My Vertafore
- Sircon Support

### **My Vertafore**

My Vertafore is our free online customer support portal and knowledge base.

With [My Vertafore](#) you can:

- **Log a Case** – Cases are used to request product support
- **Submit Ideas** – Send Vertafore ideas for new product features or enhancements
- **Search Knowledgebase** – Search for detailed articles on the Sircon Knowledge Base



**Note:** Sircon does not use the Submit a Product Idea or Chat with VICKI functions.

### **Contact Vertafore Customer Support**

Cannot find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877-876-4430.

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***APPENDIX 2: Document History***

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Version	Revision Date	Revision Record
1.0	6/12/2023	Original Document



999 18<sup>th</sup> St | Denver, CO, 80202 | 877.876.4430 | [Vertafore.com](https://www.vertafore.com)

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