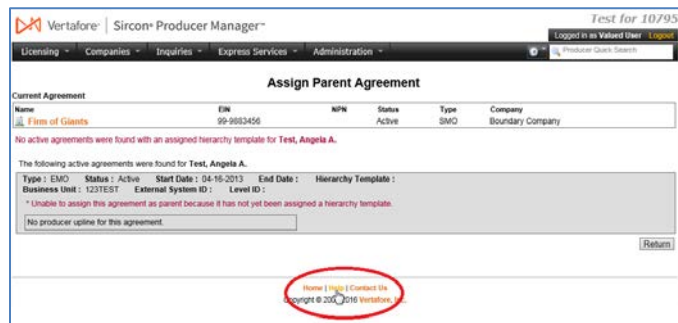


## Getting Help with Sircon Producer Manager™

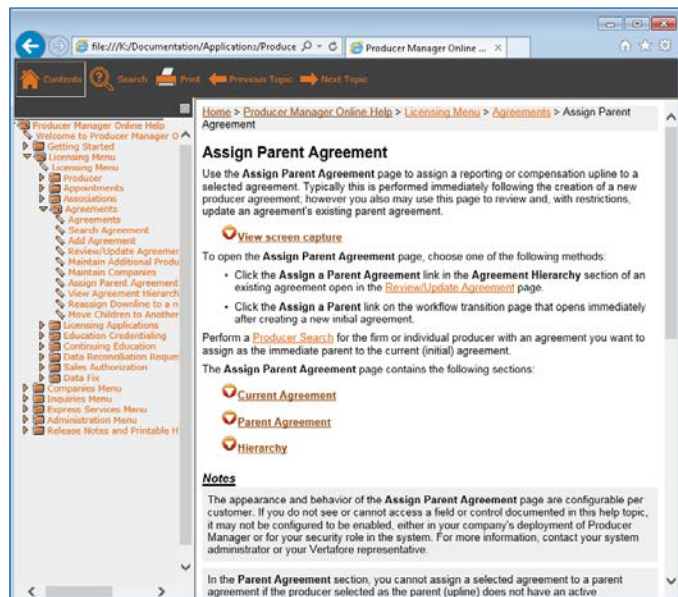
When you are working with Producer Manager, and you find you have run onto unfamiliar ground or otherwise have a question about something you see or want to do, try looking it up in the online help. Easy to use, the online help is a full, searchable system of information about Producer Manager, kept up-to-date with information about the latest features in each, new product release.

### Open the Online Help

The online help system tries to anticipate where and when you might need a little assistance. When you have a particular page open in Producer Manager, and you want to know what you are looking at or what to do, simply click the **Help** link in the footer of the page.



The online help will open in a separate browser window, directly to a help page about the very page in Producer Manager that you have open.

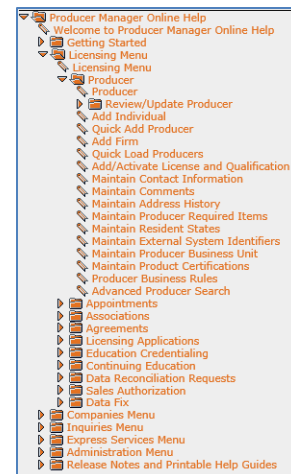


### Tour the Online Help

The help window is a “tri-pane” design, consisting of the **Contents** and **Topic** panels and the **Toolbar**.

### Contents

At the left of the help window, the **Contents** panel offers links to open any help topic in the system. It’s useful if you just want to browse the different topics of information in the online help system.



The **Contents** panel is designed to mimic the menu structure of Producer Manager itself. One exception is at the bottom – the **Release Notes and Printable Help Guides** link – which opens special topics offering downloads of the change notes for each product release as well as “deep dive” help documentation on specific topics. (More about this later.)

Many of the links are hidden inside “folders.” Just click a folder to display the links inside.

### Topic

The help information itself opens in the **Topic** panel, at the right of the help window.

A topic always begins with a brief description of the business purpose of its related Producer Manager page, followed by instructions about the ways you can open the page in the system.

Detailed information about each field or control on the Producer Manager page is hidden by default inside

**Current Agreement**

Displays the summary information about the primary producer on the current (initial) agreement.

Fields and controls include the following:

- **[Producer Name]:** Displays the name of the individual or firm producer whose agreement currently is selected. An icon to the left of the producer name signifies the producer's entity type, either individual (👤) or firm (🏢).
- **EIN:** Firm producers only. Displays a firm producer's Federal Employer Identification Number.
- **NPN:** Displays a producer's unique National Producer Number, assigned by the National Insurance Producer Registry (NIPR).
- **Status:** Displays the agreement's status, either Active or Inactive.
- **Type:** Displays the agreement type.
- **Company:** Displays the name of the appointing company that is party to the agreement.



clickable dropdown sections, denoted by a down-arrow. Simply click the section name to reveal the information inside. Click again to

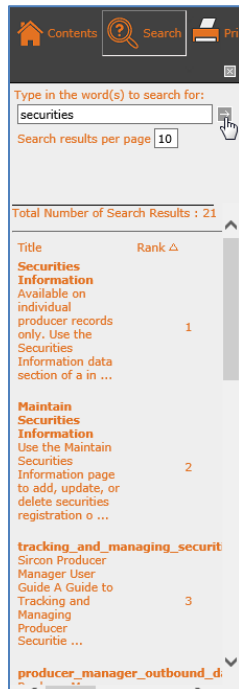
collapse the section.

Screen capture images of the Producer Manager page, often with realistic data scenarios, also are hidden inside dropdown sections. Click the **View screen capture** heading to display the screen capture image.

## Toolbar

The **Toolbar** offers different controls for working with the help system, as follows:

- **Contents:** Click to display the **Contents** panel.
- **Search:** Click to transform the left side of the help window into a search engine. In the **Type in the word(s) to search for:** field, enter a specific search keyword or phrase. Then, click the arrow button to run the search. The help system will return a list of help topics or documents available in the system that met your search criteria, along with a brief excerpt from each. Simply click to open one of the results in the **Topic** panel.
- **Print:** Click to open the **Print** dialog box, where you can print the currently displaying topic to a local or network printer.
- **Next Topic:** If you have opened multiple topics in a browse, click to open the succeeding topic in the browse.
- **Previous Topic:** If you have opened multiple topics in a browse, click to open the preceding topic in the browse.



To exit the **Online Help**, click the close button ( ) in the upper right corner of the online help window.

## Help Topics of Special Interest

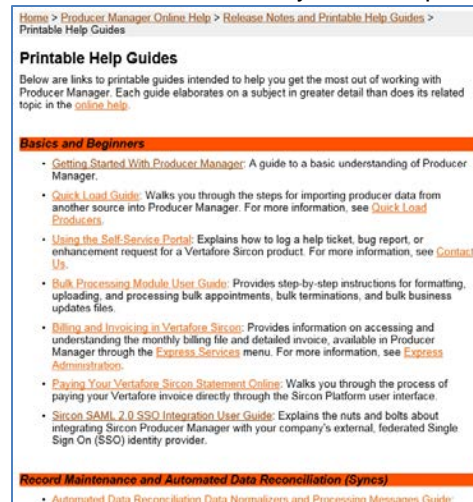
We want to point out a handful of help topics that you might find of particular interest.

## Release Notes

You can find the notes for every major release of Producer Manager and Producer Express going back several years. Just enter “release notes” in the online help **Search** tool to find the **Release Notes** topic. Click a link to download the notes in PDF format.

## Printable Help Guides

Need details on how to set up agreements in Producer Manager? How about step-by-step instructions on using the Producer Express Bulk Appointment Terminations feature? Would a side-by-side comparison of all of the



data returned in Producer Manager reports help you? These and many other valuable guides are available for PDF download on the **Printable Help Guides** topic. Enter “printable” in the online help **Search** tool.

## Configuration Options

Depending on your company’s business requirements, Vertafore may set any number of flexible “business rules” for your use in the system’s back end. You can find a complete list of all of the various configuration points in Producer Manager in the **Configuration Options** topic. You might find some listed that you will want Vertafore to configure for your company. Just enter “configuration” in the online help **Search** tool.

## Code Group Reference

The **Maintain Codes** page in Producer Manager allows users with administrative permissions to set customized lookup code values in many places throughout the system. The online help topic, **Code Group Reference**, contains a map of all user-configurable code domains, including pre-populated and system-required code values. Enter “code” in the online help **Search** tool.