Sircon

powered by **Vertafore**

SIRCON FOR CARRIERS

Maintain Locations and Departments

POWERING
YOUR
POSSIBLE.

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Overview

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 agencies) 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

Locations & Departments allow you to create a list of the different locations (cities, states, regions, or countries) that 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 & Departments setting is optional.

What will be covered?

In this quick guide, we will discuss how to categorize producers in your organization using Locations and Departments.

We will learn how to create and maintain locations/departments. Then we'll explore how to assign producers to locations/departments.

Section: Introduction to Locations and Departments

Who should use this document?

Any users that need to create and maintain locations/departments in Producer Central.

This guide can also be used by individuals that need to assign producers to locations/departments.

> **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:

- Create or Maintain Locations/Departments
- Assign Producers to Locations/Departments

Introduction to Locations and Departments

Sircon allows you to assign producers (individual licensees and firms) to locations and departments.

Both the location and the department fields are freeform, you can enter any information that makes sense, including cities, states, regions, or countries into the field.

Locations and Departments Examples

Geographic Region & Department

Location	Department
Northeast	P&C Sales
Northeast	Life & Health Sales
South	Underwriting
South	P&C Sales

City and State & Department
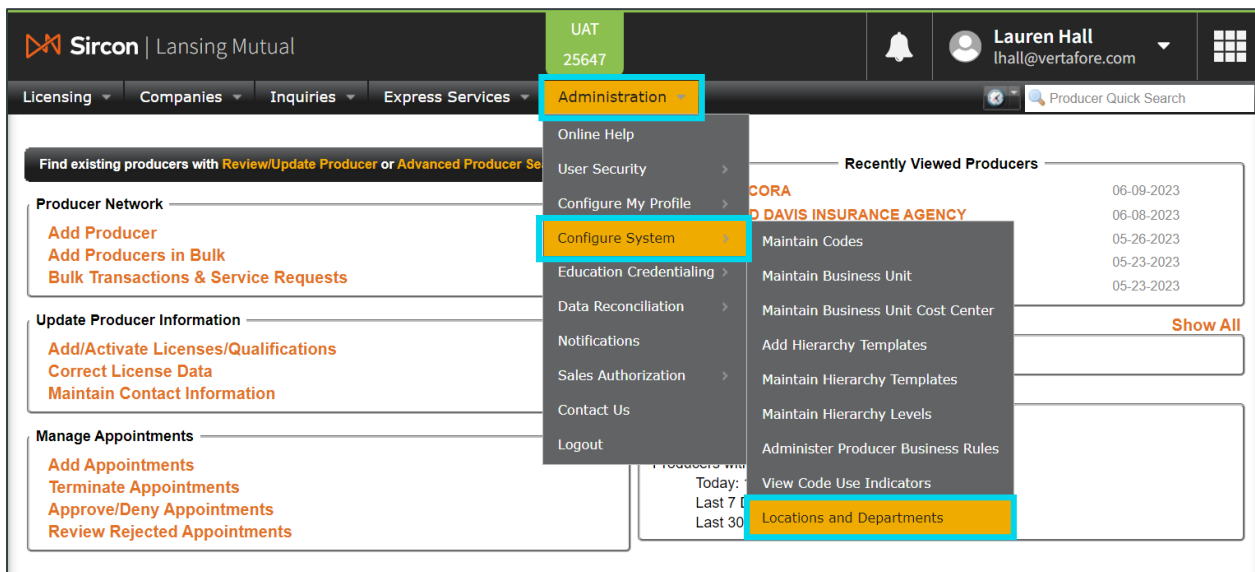
Location	Department
New York, NY	Sales
Dallas, TX	Sales
Dallas, TX	Customer Support
Los Angeles, CA	Sales

Maintain Locations and Departments

If you have system administrator permissions, use the *Maintain Locations and Departments* page to configure locations and departments that users can use to track a producer's location and department assignments on a producer record.

When adding locations and departments to a producer's record, users will only be able to add only locations and departments that are connected to one another.

1. From the **Administration** menu select **Configure System**, and then select **Locations and Departments**.

2. You will now see the *Maintain Locations and Departments* page. On this page, you will see the following fields:
   - **Name**: Full name of the location or the department.
   - **Code**: Short code for the location or department.
   - **Actions**: Allows you to perform the following functions:
     - **Edit Name**: Click the **Edit Name** (✏️) to update the location or department name and code.
     - **Save Changes**: Click **Save Changes** (✅) to save the updates you made to the location or department name.
     - **Cancel**: Click **Cancel** (❌) to stop modifying the name.

![Vertafore logo]

Section: Maintain Locations and Departments

Add a Location and/or Department to Organization

Follow this process to add a location or a department to your organization.

ADD LOCATION

1. In the *Add New Location* section, type the **Name** of the location and a short **Code** that reflects the location name. The location can be a city, state, country, or region.

> **Note**: Names can only contain letters, numbers, dashes, underscores, or spaces.

2. Click **Create Location**.

3. The location will now appear on the page.

![Vertafore logo]

Section: Maintain Locations and Departments

ADD NEW DEPARTMENT

1. In the *Add New Department* section, type the **Name** of the department and a short **Code** that reflects the department name.

> **Note**: Names can only contain letters, numbers, dashes, underscores, or spaces.

2. Click **Create Department**.

3. The department is now available in the list.

![Vertafore logo]

Section: Maintain Locations and Departments

Edit an Existing Location or Department

Follow these steps to edit an existing location or department from the *Maintain Locations and Departments* page.

1. Click the **Edit** button (✏) next to the location or department you need to modify.

2. You will now be able to update the **Name** of the location.

> **Note**: You cannot update the **Code**. Once you create the code, it will remain in the system for tracking purposes.

3. Once you finish updating the name, click the **Save Changes** button (✅). You can click the **Cancel** button (❌) to exit changes.

4. The changes will appear in the *Maintain Locations and Departments* page.

Connect Locations and Departments

After you create the locations and departments, you will need to connect each location and department before you can assign a producer.

1. Click the **Connect Locations and Departments** button.

2. From the dropdown list, select the **Location** and then the **Department** you need to link.
3. Select the **Begin Date**. It is recommended that you set the begin date to a date in the distant past.
4. Click **Connect**.

Section: Maintain Locations and Departments

Connect Locations And Departments
Related Pages: **Maintain Locations and Departments**

Locations And Departments

Location	Department	Begin Date
Chicago (CHI)	Finance (FIN)	06-12-2023

Connect

Current Location Department Connections

Location	Department	Begin Date	Actions
Chicago (CHI)	Sales (SALES)	02-01-2022	🖉
Chicago (CHI)	Service (SRVC)	02-01-2022	🖉
Detroit (DET)	Sales (SALES)	02-01-2022	🖉
Detroit (DET)	Service (SRVC)	02-01-2022	🖉
Los Angeles (LA)	Sales (SALES)	02-01-2022	🖉
New York (NY)	Sales (SALES)	02-01-2022	🖉
Norfolk VA (NOR)	Sales (SALES)	05-01-2023	🖉

Actions: 🖉 Edit Begin Date ✅ Save Changes ❌ Cancel

5. You will now see your entry in the *Current Location Department Connections* section.

Connect Locations And Departments
Related Pages: **Maintain Locations and Departments**

Locations And Departments

Location	Department	Begin Date

Connect

Current Location Department Connections

Location	Department	Begin Date	Actions
Chicago (CHI)	Finance (FIN)	06-12-2023	🖉
Chicago (CHI)	Sales (SALES)	02-01-2022	🖉
Chicago (CHI)	Service (SRVC)	02-01-2022	🖉
Detroit (DET)	Sales (SALES)	02-01-2022	🖉
Detroit (DET)	Service (SRVC)	02-01-2022	🖉
Los Angeles (LA)	Sales (SALES)	02-01-2022	🖉
New York (NY)	Sales (SALES)	02-01-2022	🖉
Norfolk VA (NOR)	Sales (SALES)	05-01-2023	🖉

Actions: 🖉 Edit Begin Date ✅ Save Changes ❌ Cancel

Note: You will need to repeat this process for each location and department combination to assign producers to that location.
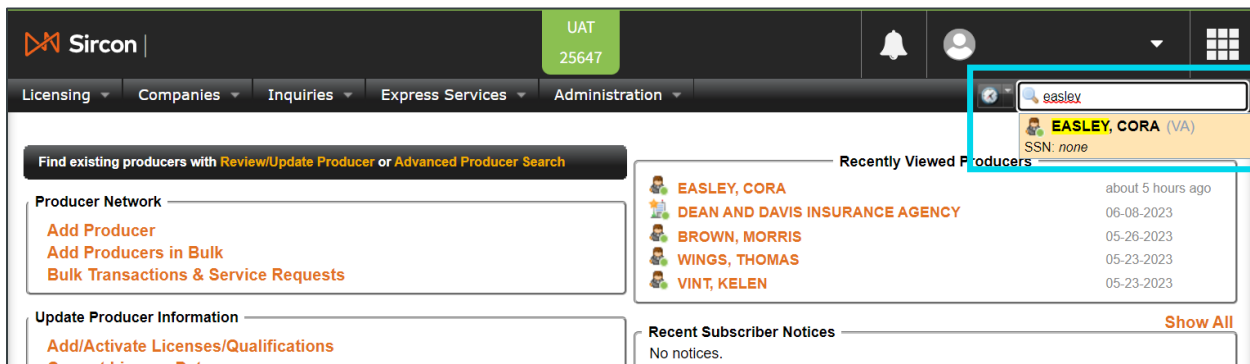
Assign Producers to Locations/Departments

Follow these steps to assign producers to locations/departments.

Assign Producers to Locations and Departments
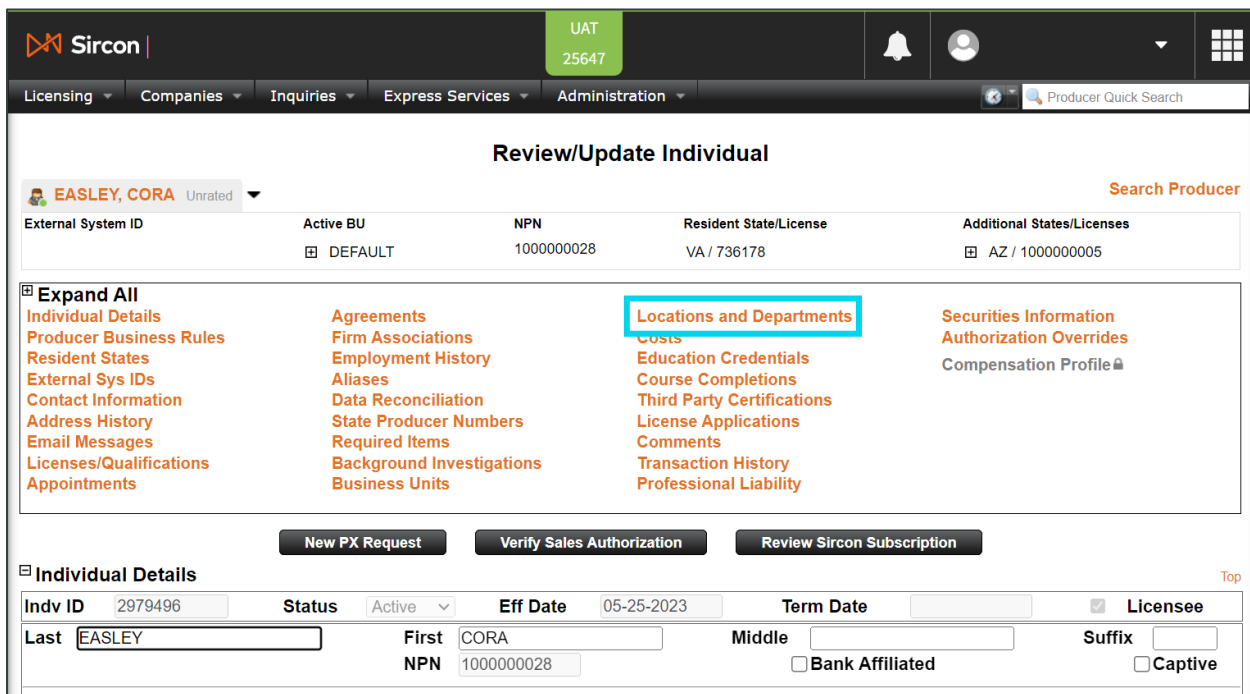
Follow these steps to assign a producer to a location and department. This is an optional step that you can use to categorize producers in your organization.

1. Type the name of the producer in the **Producer Quick Search** box. You will see the top ten producers that fit your search criteria.
2. Select the **Name** of the producer.

3. From the quick links section, click **Locations and Departments**.

4. To assign a producer to a new location and/or department, click **Add New Locations and Departments**.

5. Click to highlight the assignment you want to add.
6. In the selected assignment's **Begin Date** field, enter the date on which the assignment became active, using the mm-dd-yyyy date format or click the **Calendar** button (📅) to open a popup calendar from which you can click to select a date.
7. Click the **Add Selected Locations and Departments** button to activate the assignment.

8. The assignment will appear in the **Active** sub-section. To cancel adding an assignment, click the **Cancel** button (❌).

Inactivate Location and Department

1. From the *Locations and Departments* data section, click the **Inactivate** (🔴) button next to the location in the **Actions** column.

2. Enter the **End Date** using the mm-dd-yyyy format or click the **Calendar** (📅) button to select a date.
3. Click the **Inactivate** button.

4. The location and department you selected is now in the **Inactive** section.

Reactivate a Location and Department

1. Click the **Reactivate** button (🟢) next to the location/department you want to add.

Section: Assign Producers to Locations/Departments

2. You will now see the location/department appear in the **Active** column.

| Locations and Departments | | | Top |
| Add New Locations and Departments | | | |

Active

Location	Department	Begin Date	Actions
New York	Sales	05-01-2022	🖉 🔴
Norfolk VA	Sales	05-01-2023	🖉 🔴

Actions: 🖉 Edit Dates 🔴 Inactivate ✅ Save Changes ❌ Cancel

Note: The Locations and Departments data section is available on individual producer records only.

Depending on how the system is configured, you may record a location without a related department, or vice versa.

Location and department values are configurable by a user with administrative permissions. For more information, refer to the Administration quick guide.

APPENDIX 1: Sircon for Carriers Help Resources

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

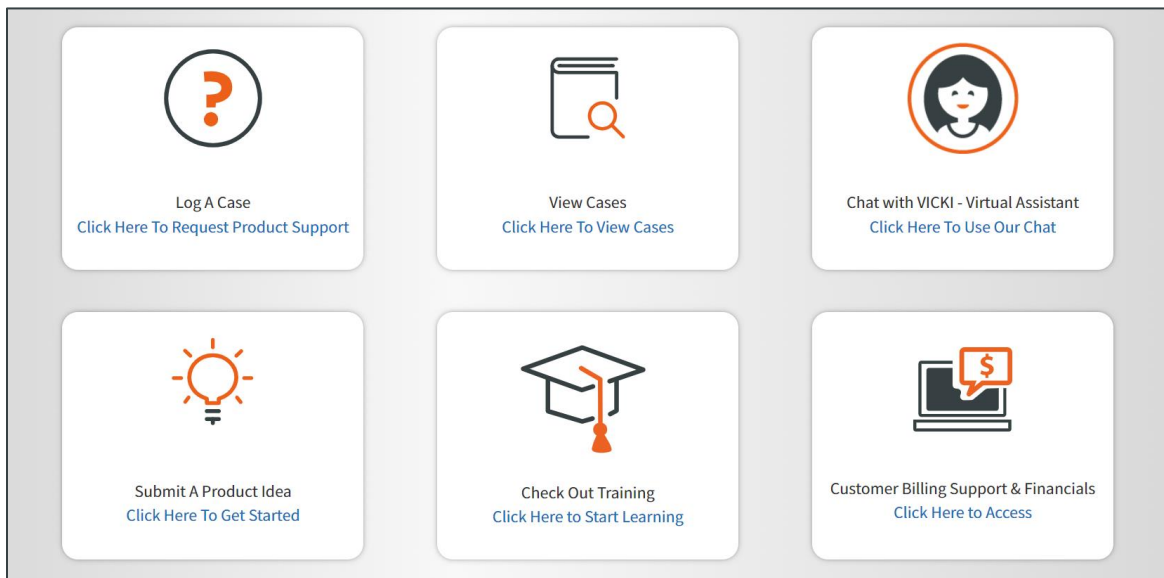- My Vertafore

- 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.

APPENDIX 2: Document History

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

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