

**Subject: Producer Lifecycle Management v.5.12 Production Release Notes**

**To: All PM/PX customers**



**Producer Lifecycle Management™ (Producer Manager™/Producer Express™)**

**Version: 5.12**

**Production Release Date: January 7, 2012**

**Overview**

Producer Lifecycle Management™ version 5.12 was released to the production environment on January 7, 2012.

**Enhancements**

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

**Administration**

- **Removal of Default Module:** The Default Module dropdown menu has been removed from the Review/Update User page in Producer Manager, as modules are no longer used. [MKT-9114]

**Appointments & Terminations**

- **Review Rejected Appointments:** Additional identifying producer information (a.k.a., “producer badge”) has been added to the Review Rejected Appointments page in Producer Manager. This adds not only searchable producer information to the page, such as resident state(s), Social Security Number/Federal Employer Identification Number, external system ID, and business unit, but also provides a hyperlink to a listed producer’s record.

Note: The Review Rejected Appointments page is available only for carrier installations of Producer Manager. (*Licensing > Appointments > Review Rejected Appointments*) [MKT-9142]

**Automated Data Reconciliation**

- **Data Reconciliation Requests:** The Data Reconciliation Requests page in Producer Manager now will “remember” the filter and page in the queue that you most recently used and viewed. In addition, the Data Reconciliation Details page includes the Return to Search button, which returns you to your point of departure on the Data Reconciliation Requests page. (*Licensing > Data Reconciliation Requests*) [MKT-2127]
- **Reconciliation Limit Message:** The maximum reconciliations per-hour or per-day message that displays on the Scheduled Syncs page in Producer Manager has been updated for clarity. (*Administration > Data Reconciliation > Scheduled Syncs*) [MKT-9115]

## Background Investigations

- **Simulation of BI Responses:** Background investigation responses in either Producer Manager or Producer Express now can be simulated for testing purposes in the UAT environment. If you are interested in testing background investigations with simulated responses, please contact your Vertafore representative for more information. [MKT-9016]

## Billing & Cost Management

- **Default Cost Center:** For ease of use, the name of the cost center that is tied to a producer's default business unit is pre-selected in all Cost Center dropdown menus in Producer Manager. The default cost center is denoted as "(default)" in a dropdown menu, for easier recognition. You may override a default cost center by selecting a different cost center, if desired. If no cost center has been configured to a producer's default business unit, the Cost Center dropdown menu will be populated as before. [MKT-8944]

## Licensing

- **User Audit Information:** Additional user audit information is now included with licenses and qualification information in Producer Manager. A new Audit Information sub-section is available in the Licenses/Qualifications data section on a producer record that is open in the Review/Update Producer page. This section indicates when the license or qualification was created and by which user. It also indicates when a license or qualification was last updated and by which user.

In cases where the PLM system added license or qualification information (such as during a Scheduled Sync), the user associated with audit information will be displayed as "System User."

To view the details of a license or qualification, click the node to the left of the License State field in the Licenses or Qualifications data sections. [MKT-5817]

## Reports & Inquiries

- **License Renewals Due Inquiry:** The results of the License Renewals Due Inquiry in Producer Manager now include producers' resident state and resident license number. This information is necessary to process a license renewal. (*Inquiries > Producer Management > License Renewals Due*) [MKT-8179]

## Bug Fixes

The following is a log of bugs that have been fixed in Production since the last Producer Lifecycle Management™ release notes:

- The Browser Requirements page was not displaying properly for users attempting to login to Producer Express with an unsupported browser type or version number. [MKT-9082]
- When Producer Manager received both approved and denied appointment results for a producer for different appointment types in the same state and for the same writing company, occasionally the Reject Reason field in the Appointments data section contained a value for both the approved and denied appointments. [MKT-9048]
- The Print Documents page in Producer Express was not correctly filtering out documents in the agency admin interview. [MKT-7880]

- The CourseRequirements section of the Producer Manager Outbound Data Feed was not correctly handling certain special characters. [MKT-9160]
- Data reconciliation education syncing in Producer Manager was not filtering out duplicate course completions, if the values of certain course information fields were identical except for letter case. [MKT-8837]
- The hyperlink to download the latest version of Adobe Reader on the Print Packet page of Producer Express was not pointing to the correct version of Adobe Reader. [MKT-9088]
- A data reconciliation in Producer Manager for a producer with a name suffix containing a numeric digit on the PDB was failing to complete. [MKT-9098]