PLM Producer Manager/Producer Express 6.4 Production Release Notes
June 29, 2013

Vertafore is pleased to release PLM Producer Manager and Producer Express v.6.4.

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

Training

On June 18, 2013, Vertafore presented a training webinar on the highlights of this release. To view a recording of the webinar, visit the Vertafore Producer Lifecycle Management Training page at http://www.vertafore.com/plmtrainingondemand. Contact your Vertafore customer support representative for the password.

Major Enhancements

The following table summarizes the most important enhancements in this release:

Enhancement	Description
Producer Express Help Desk Role	A new Help Desk user role in Producer Express provides view-only access and allows field support personnel to advise agents of onboarding status.
Automated Routing of Producer Express Requests Based on Agreement Hierarchy	Producer Express now supports automated routing of a producer onboarding request to a recruiter's highest upline in a sales hierarchy, such as an FMO or MGA, for contract signature.
Producer Express User Management Web Service	A new inbound integration point allows user information passed from another system to automatically create user accounts in Producer Express.

Questions

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

- Call **(877) 876-4430**

Enhancements

The following tables list details of the enhancements in this release, grouped by application and type:

Producer Express

Help Desk Security Role

Feature	Description
Help Desk Role in Producer Express	Many carriers have field support or agent help desk departments that assist with the producer onboarding process. Help desk personnel need view-only access to Producer Express, so that they can advise agents of onboarding status. Previously, Producer Express offered only user roles that could create or modify producer onboarding requests. Now Producer Express supports a new security role: Help Desk. Users with the Help Desk security role have their own user accounts with a Workspace to allow them to search for and view the status of agent onboarding requests. **Note**: To take advantage of this enhancement, please contact your Vertafore sales representative. [MKT-10185]
Help Desk Workspace	The Help Desk Workspace displays all requests that a help desk user has permission to view based on the channels assigned to his or her user account. Requests may be filtered or sorted by Request ID, Request Date Range, Producer Name, or Producer TIN. [MKT-10196]
Help Desk View Request Detail	By clicking the View Request button associated with a selected request displaying in the Workspace, a Help Desk user can view "read-only" summary information about the request. The "read-only" view of a request includes the following:

Feature	Description
	• Summary Tab containing general request information, such as Producer Name, Request Status, Request ID, Transaction Type, and request Initiated Date; a Milestone History Report, and Stop Packet Information, if the request has been manually closed during processing. • Documents Tab, displaying an alphabetic list of all contracting forms and documents currently attached to the request. The system is Vertafore-configurable based on customer requirements to allow a "read-only" view of the actual forms or documents. A Help Desk user's view of request details can be Vertafore-configured based on customer preference. [MKT-10197]
Help Desk - Reset Other Users' Passwords	To help support other users in the field, users with the Help Desk security role can search for other Producer Express users, either active or inactive, and optionally reset their passwords. Help Desk users are restricted from adding, modifying, or inactivating other user accounts. This option can be Vertafore-configured based on customer preference. [MKT-10186]

Automated Onboarding Request Routing Based on Agreement Hierarchy

Feature	Description
Use Agreement Hierarchy to Automatically Route Producer Express Requests to Recruiter's Highest Upline	To help streamline the onboarding process, Producer Express now can automatically route an onboarding request to the highest upline in a recruiter's sales hierarchy, such as an FMO, MGA, or other distributor. Formerly it was necessary for the recruiter to manually select the correct upline producer from a list. After an onboarding request is initiated by the

Feature	Description
	recruiter, sent to a producer to complete interview questions, and then returned to the recruiter for review and signature, the can be routed automatically to the highest upline producer in the recruiter's agreement hierarchy. The upline producer then can open the request in the Distributor Workspace and affix an electronic counter-signature to the producer's contracting forms before routing the request to the carrier home office for processing.
	Producer Express determines a recruiter's highest upline in a hierarchy by checking writing number and agreement type information in the recruiter's record in Producer Manager.
	Note: To take advantage of this enhancement, please contact your Vertafore sales representative.
	[MKT-9677, MKT-10208]
Link Non-Producer Users to Producer Records	Some customers have recruiters and distributors who work on behalf of a producer but are not themselves producers. This means that some users in Producer Express may not have a producer record in Producer Manager with the agreement hierarchy information necessary for automated request routing to work.
	To overcome this situation, now a Producer Express administrative user can link a non-producer to the record in Producer Manager of the firm they represent. Simply identify the user you want to link, and then on the Edit User page, search for the record of a producer in Producer Manager based on name and writing number (external system ID) criteria. Click the Associate This Producer button to tie the user to the producer.
	[MKT-10198]

User Management Web Service

Feature	Description

Feature	Description
User Management Web Service	When the Producer Express Onboarding Web Service is used to onboard recruiters or distributors, user account information in a customer's calling system often needs to be kept in sync with related user account information in Producer Express. When Producer Express user accounts are added or maintained manually, it can be a labor-intensive process that can cause delays in recruitment. With the new Producer Express User Management Web Service, the calling system can automatically add, update, or inactivate user accounts in Producer Express and therefore eliminate re-keying user information in Producer Express. **Note**: To take advantage of this enhancement, please contact your Vertafore sales representative. [MKT-9959]
User Search	For various purposes throughout the system, Producer Express offers dropdown menus listing the names of system users. When a large volume of licensing, recruiter, distributor, or other users have accounts in the system, the dropdown menu can become inefficient for finding and selecting a particular user. Now the system is Vertafore-configurable to enable a search field that can be used to search for a specific user name, instead of using a static dropdown menu. As long as they share at least one user account channel in common, users can search for other users by last name, first name, or username. [MKT-10221, MKT-10263]

Other Enhancements

Feature	Description

Feature	Description
DTCC LNA Format Changes	Now Producer Express supports updates to the DTCC Licensing & Appointments (LNA) file format. Format updates include removing money settlement fields, expanding the size of the course number field, and changing phone number and Zip code fields to numeric only. [MKT-10270]
NAIC Model Act Annuity Training Credential Program	The NAIC Model Act Annuity Training template-based credential program has been added to Producer Manager to support Idaho and Mississippi. [MKT-10315, MKT-10236]
Continuing Education Transcript Inquiry	The Continuing Education Transcript Inquiry page, accessible from the Express Services>Inquiries menu in Producer Manager, now includes the Return to Producer Manager button for easier system navigation. Click the button to open the Producer Manager Home page. [MCX-4575]
Bulk Reassign Requests	The Producer Express Bulk Reassign>Reassign Requests page allows reassigning multiple requests among users or the generic work queue. Previously the Reassign Requests page would display the names of 1000 users before breaking the list of names onto additional pages. To enhance performance, the Reassign Requests page now displays 100 users per page. [MKT-10407]
Reporting Server Upgrade	Vertafore PLM upgraded to the latest supported version of the Actuate reporting server, which processes inquiry requests in Producer Manager. [MKT-10436] **IMPORTANT CUSTOMER NOTE**: All pending or processed inquiries displaying on the Recent Reports page in Producer Manager (*Inquiries>All Reports>Recent Reports*) prior to the release no

Feature	Description
	longer will be available after the release. Before June 29, please download from the Recent Reports page any inquiry results you wish to retain and save them to your system. You also may re-run the same inquiries following the release. If you have questions or concerns, please contact your Vertafore representative.

Bug Fixes

The following is a log of bugs that have been fixed since the last production release:

Bug	Resolution
Producer Hierarchy Inquiries - License Renewals Due	The Producer Hierarchy Inquiries - License Renewals Due in Producer Manager was returning extra rows for each license/LOA combination using a blank business unit value, even if the producer is already assigned to a business unit. [MKT-10124]
Producer Express Evites	Some users in Guarantor and Supervisor user roles in Producer Express were no longer receiving third-party signature evite emails. [MKT-10041]
Transaction History Report	The Producer Express Transaction History Report was unavailable if accessing Producer Express from Producer Manager after the browser's temporary files were deleted. [MKT-10422]
DTCC Terminate Appointment (TA) Transactions	After processing DTCC Terminate Appointment (TA) transactions, Producer Express was routing requests to the Error Queue instead of completing them with a status of "Processed." [MKT-10381]
Producer Onboarding Web Service	Some requests created in Producer Express by the Producer Onboarding Web Service were not displaying in the licensing specialist's work

Bug	Resolution
	queue. [MKT-10183]
Access to All Queues	The Access to All Queues user account setting was being reset if a user requested a new password from the Account Options page in Producer Express. [MKT-10234]
Recruiter Workspace	An onboarding request routed by evite from a recruiter administrator to a producer was not visible or available in the recruiter's Workspace in Producer Express. [MKT-10223]