

Sircon Producer Manager and Producer Express Production Release Notes for December 2019

Vertafore will deploy the following updates during the scheduled downtime on December 06, 2019.

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

QUESTIONS

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

- Call us at (877) 876-4430
- Email us at plmsupport@vertafore.com
- Login to the self-service portal at https://support.vertafore.com/vf_VertaforeLogin

WHAT'S NEW

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

| Feature | Description |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Branches Incorrectly/Inconsistently Reassigned When PDB Group Id Changes on the PDB | When PDB Group Ids change on the PDB, Producer Manager has logic to automatically assign the new PDB Group Id to the branch record that the previous PDB Group Id was assigned to. This is intended to keep licenses and appointments active while eliminating the need to manually reassign the PDB Group. An issue was resolved with this process when the PDB Group id changed more than one time. [TROT-3960] |
| Adding Producer Records in Bulk in Producer Manager with Daily PDB Updates | Daily PDB Updates now supports adding connected individual and firm Producer Manager records in bulk using a spreadsheet. The following additional options are available when bulk adding: <ul style="list-style-type: none">• Creating records for producers not found on the PDB• Creating duplicate firm records [PLM-10622] |

| Feature | Description |
|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Education Syncing Support for Producer Manager Daily PDB Updates | <p>Daily PDB Updates now supports education updates for customers who have education syncs enabled.</p> <p>Customers with Education enabled for their account as well as for their default individual merge profile have producer's education information updated whenever a sync occurs. Furthermore, the new Education Updates Job automatically updates education information for individual, connected, and eligible producers on the following cadence:</p> <ul style="list-style-type: none"> • 5 days before a license expires • 14 days since the last education update <p>[PLM-11018]</p> |
| Branch Office Syncing Support for Producer Manager Daily PDB Updates | <p>Daily PDB Updates now supports Branch Office updates for customers who have Branch Office syncs enabled.</p> <p>[PLM-9991, PLM-10895]</p> |
| Calculate Michigan License Expiration Dates with Daily Updates | <p>Michigan individual, resident expiration dates are now calculated for customers using Daily PDB Updates using the date of birth instead of CE dates, as CE dates are not available in alerts.</p> <p>[TROT-3894]</p> |

Vertafore customer support is available to assist with any questions or concerns you have regarding this notification at 877-876-4430.