

Sircon Producer Manager and Producer Express Production Release Notes for December 04, 2020

Vertafore will deploy the following updates to the Production environment during the scheduled downtime on December 4th, 2020.

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



Note: Detailed information about new Sircon Producer Manager or Producer Express features will be available in the online help with the production release of this version.

SIRCON CARRIER PRODUCTS IN THESE RELEASE NOTES INCLUDE:

- Producer Central
- Producer Manager
- 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 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 UAT release:

Feature	Description
Mask SSN for Review Update Producer Individuals	A new Show Unmasked Social Security Numbers (SSNs): 999-99-9999 permission was added to Producer Manager to replace the existing Mask Social Security Numbers (SSNs) permission. This new permission serves the same purpose, but is inverted from the previous permission so that if a user has at least one role which includes the Show Unmasked Social Security Numbers (SSNs): 999-99-9999 permission then that user will be able to view unmasked Social Security

Feature	Description
	<p>Numbers. If the user has no role with the Show Unmasked Social Security Numbers (SSNs): 999-99-9999 then Social Security Numbers will be masked.</p> <p>In addition, the Social Security Number (SSN) on the Producer Manager Review Update Individual is now masked according to the new permission.</p> <p>Users will retain their current level of masked SSN permissions. Existing user security roles were automatically updated to ensure that users maintain the same level of visibility. For some customers, this involved creating a new SHOW_SSN security role. The new security role only activates the new permission and was assigned to users that were already allowed to see the Full SSN.</p>
Review/Update Company Search Page Error	<p>Corrected an error when accessing Review/Update Company page in Producer Manager which resulted in Search Company being displayed twice, once at the top and once at the bottom of the page.</p>
User Unable to Search in Producer Manager Quick Search	<p>Fixed an issue with Producer Manager Quick Search which resulted in an error for any user who did not have the View Firm Resident States or View Individual Resident States permissions in an assigned role.</p>
Daily PDB Updates: Perpetual Licenses Not Updating Due to Long Running Job in Producer Manager	<p>The process to update perpetual license expiration dates was previously taking too long and would not complete before the nightly restart. This resulted in some license expiration dates not being updated as expected.</p> <p>This issue was resolved by increasing the performance of the job so that the process can complete as expected.</p>
Daily PDB Updates: Increase the Priority of Producer Created Via Add Producers in Bulk	<p>Now, for customers using Daily PDB Updates, when a producer record is added through Add Producers in Bulk, a data reconciliation is created with priority above PDB Updates,</p>

Feature	Description
	<p>Excluded State Updates, Recalculation Updates, and Education Updates but below the priority of Data Fix Updates, PX Updates and Force Refresh Data Updates.</p> <p>This will allow for faster population of producers created via Add Producers in Bulk with PDB Data if there are still Daily PDB Updates processing.</p>
