Sircon Producer Manager and Producer Express Production Release Notes for May 22, 2020

Vertafore will deploy the following updates to the Production environment during the scheduled downtime on May 22nd, 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 (no updates)
- Producer Express (no updates)

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
Daily PDB Updates (Producer Central only): PDB Updates Summary - Producers with Completed Updates	A new PDB Updates Summary Box is now displayed on the Producer Central home page. This box summarizes: • The number of distinct producers with pending updates

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Feature	Description
	• The number of distinct producer records that were synced with PDB in the last day, 7 days, and 30 days. • Each agency record that shares an EIN, such as branch offices, will count separately in the total. Not every producer record will reflect a data change as a result of processing these updates.
Enhancement to Close Outdated Producer Express Requests	Over the years, not all producer requests were fully processed or explicitly closed. These orphaned requests would occasionally show up in large numbers to slow load times in the workspace or add extra processing time for the application. Starting with our 5/22/2020 production release, Vertafore will begin to close out any of these **expired** requests that are still incomplete after one year. Key points to this change: • Starting with the oldest, expired producer requests, Producer Express will close, up to 1,000 packets per customer per day, to reduce impact to downstream systems. • A milestone will be added at the same time Producer Express updates the request to **Closed**. • The Licensing Specialist workspace criteria will have a check box for **Expired Requests Only** that can be used in conjunction with other criteria options to search for packets closed with this new milestone. Please reach out to your customer account team for any questions.