Sircon for Carriers
Sircon for Agencies/Brokerages
Production Release Notes
Version 5.4

This release of the next version of Sircon for Carriers and Sircon for Agencies/Brokerages features several enhancements, technical/security updates and bug fixes. It was successfully released to production environments on Friday, June 11, 2010.

Comments or suggestions? Contact us at feedback@sircon.com. We value your input.

Sircon Training

If you want training on Sircon for Carriers or Sircon for Agencies/Brokerages, please ask your Sircon sales representative about Sircon's training services.

Massachusetts Appointment Data Reconciliation

- **Massachusetts Appointment Data Reconciliation Issue:** Massachusetts tracks appointments by line, and as such, appointment requests must be sent to the state by line. However, the state only reports a single 'generic' line to the PDB. For this reason, it is not possible for Sircon to determine which lines a producer is appointed for by looking at PDB information alone and Massachusetts appointments were not correctly recorded when synced from PDB data.

  Data reconciliation has been updated to ignore appointments when syncing Massachusetts. A new processing message has been added to notify users of this scenario: "Massachusetts appointments were not synchronized because Massachusetts does not report LOA information to the PDB." If a license in Massachusetts has been inactivated on the PDB, any appointments that relied on the license will be inactivated. **PM** (MKT-6619)

Enhancements and Improvements (All Users)

- When running the "Company Appointment List" inquiry in "spreadsheet view," the search criteria was not previously included in all report results. This information will now be included in both the Excel view and the inquiry results pop-up window. Search criteria information is already included in the PDF view of the report. This enhancement will make it easier for users who run this report for multiple different writing companies to identify which writing company is being referenced in the report. (*Inquiries menu > Appointment Inquiries > Company Appointment List inquiry*) **PM** (MKT-6621)

- A link to the client "Self-Service" portal has been added to the "Contact Us" page, allowing users to access the portal login page from within Producer Manager. *(Administration menu > Contact Us)* **PM** (MKT-6576)

- When processing appointment terminations, the page titles would display "Appointment Processing Results for State: [*state*]." To clarify what is happening during this process, page titles have been updated to display "Appointment Termination Results for State: [*state*]." (*Licensing menu > Appointments > Terminate Appointments)* **PM** (MKT-6479)

Integration

Producer Express Contract Data Extract

- **90 Day Limit on Previously-Retrieved Batches**: PX webservice request and response information more than 90 days old will automatically be purged. As part of this change, users will no longer be able to retrieve a previously-retrieved batch of the Contract Data Extract that was pulled more than 90 days prior. **PX** (MKT-6488)

Resolved Issues

- Fixed a display issue where the Activity Report in Producer Express was not displaying page numbers properly. **PX** (MKT-4969)

- Fixed the error message displayed when a PX user attempts to view a producer record in PM, but that record has been deleted. User will now be redirected to a search page. **PM/ PX** (MKT-5980)

- Fixed error message that displayed on the Move Children to Another Agreement page when a large number of child agreements existed. **PM** (MKT-6443)

- Fixed an issue occurring when terminating appointments during a Maintenance Transaction in Producer Express. In some cases the specified termination reason and effective date were ignored and default values were used. **PX** (MKT-6518)

- Fixed an issue where the "Date of Birth" field in PX was not being appropriately updated with information from PM. **PM** (MKT-6528)

- Fixed the link to the online help on the Contact Us page. **PM** (MKT-6557)

- Fixed an issue where firm name with maximum amount of characters (155) and using no spaces causes justification issues in the "Recently Viewed Producers" section of the home page. **PM** (MKT-6564)

- Updated the phone number displayed on the "Contact Us" page accessed through the Administration menu. **PM** (MKT-6574)

- Fixed an issue that was occasionally preventing PM from sending PDB information to PX. **PM/ PX** (MKT-6604)

- Fixed an issue where appointment data for a producer was not being correctly removed in certain scenarios. This caused certain reports (such as the Review Rejected Appointments report) to return errors. **PM** (MKT-6607)

- Fixed an issue that was preventing some users from expanding unpopulated sections of the Review/Update Individual page. **PM** (MKT-6656)

Symbol Legend

Many items in this document are denoted with a product-specific symbol:

- An item denoted with a **PM** symbol indicates a change that applies to Producer Manager.

- An item denoted with a **PX** symbol indicates a change that applies to Producer Express.