

Working with Producer Business Rules in Producer Manager

Producer Business Rules are a way for Producer Manager users to apply certain pre-defined processing rules to a producer. There are a limited number of business rules currently available for use in the system, and once you've activated those rules you can apply them globally to all producers, as well as identify certain producers for which you do NOT want that rule applied.

What Rules are Available?

There are eleven business rules available within Producer Manager. Eight of them will only apply to your business if you are using Vertafore Sircon's DTCC capabilities. The other three may or may not be useful to you, depending on your company's needs. Let's take a look at those three.

Note: If you are using Vertafore Sircon's DTCC capabilities, please contact your account representative for more information about how those seven producer business rules may be useful to you.

Tip: Many instances on Producer Manager have only three producer business rules active, and the other seven are hidden from view to help reduce confusion.

Allow Scheduled Syncs to Run for this Producer

This rule is useful for anyone using Producer Manager.

If this rule is activated, and if the **Default Value** of the rule is set to "Yes," then this rule will globally allow scheduled syncs to run for all producers. You may then identify specific individuals or firms that you do *NOT* want included in scheduled syncs.

This option is especially useful if you are working with firms that have multiple branches using the same EIN. If you do not want those firms included in a regularly scheduled sync, you may exclude them using this rule.

Exclude Producer from Outbound Data Feed

This rule is useful for any Producer Manager client that is using the Outbound Data Feed (OBDF).

If you activate this rule, and if the **Default Value** is set to "No," then you may use this rule to exclude certain producers from the OBDF.

This option is useful if you have terminated a producer, but their status in Producer Manager is still "Active." You may exclude these producers by setting this producer business rule.

Request Appointments for a Producer Following a Data Reconciliation

This rule is only useful to those Producer Manager clients who have Enhanced Appointment Profiles (EAPs) and their profile includes submitting an appointment for a producer after data reconciliation.

If you activate this rule and if the Default Value is set to "Yes" then Producer Manager will submit appointments as usual after a data reconciliation. You may then prevent an appointment from being submitted for specific producers by setting this business rule on their record and setting the value to "No."

Getting Started

Using Producer Business Rules in Producer Manager is a two-part process. First, the administrator must activate the rules your company wishes to use. Second, you must go in to the producer record and set the rule for a specific producer. Let's look at what the Administrator sees first.

Administering Producer Business Rules

To access the page, click the **Administration** menu, then **Configure System**, and then **Administer Producer Business Rules**.

Once on the page you will see three options below the title; **Active Rules** | **Inactive Rules** | **All Rules**. Depending on whether you or anyone else has previously activated rules, you may find the rules are active or inactive, so you'll have to click the three option links to find the business rule you are looking for.

Administer Producer Business Rules			
Activate or disable rules that govern processing logic for a selection of producers. Activated rules will be available for configuration on each producer.			
Active Rules (3) Inactive Rules (0) All Rules (11)			
Active Rules			
Allow Scheduled Syncs to Run For This Producer <small>If set to "No" for a producer, the producer will not be synced by a Sync Schedule.</small>	Status: Active	Default Value: Yes	 
Exclude Producer from Outbound Data Feed <small>If set to "Yes" for a producer, the producer will not show up in the Outbound Data Feed. If set to "No", all unreported changes to the producer will appear in the next Outbound Data Feed.</small>	Status: Active	Default Value: No	 
Request Appointments for a Producer Following a Data Reconciliation <small>If set to "Yes" for a producer, will request any available appointments in pre-appoint states after a data reconciliation updates the producer record.</small>	Status: Active	Default Value: Yes	 
<small>Key:  = Edit  = View Producers With Custom Values</small>			

For the purposes of this demonstration, we will focus on the **Allow Scheduled Syncs to Run for this Producer** rule.

In all rules, whether active or inactive, there are two actions you can take. You may edit the rule by clicking the **Edit** button (✎) or you may view producers that are associated with this rule by clicking the **View** button (🔍).

When you edit the rule by clicking the **Edit** button (✎) the table row expands to show additional fields and controls:

1. **Status:** From the dropdown you may choose Active or Inactive. Making the rule inactive will mean that it cannot apply to anyone in the system.
2. **Default Value:** From the dropdown menu choose “Yes” or No. In our example, if we set the **Default Value** to “Yes,” that means that **Scheduled Syncs** will run for all producers by default.

Clarification: This may seem confusing because if the rule is inactive then **Scheduled Syncs** will run for all producers by default. The reason you would want to turn the rule on is to give yourself the ability to prevent certain individuals or firms from being included in a **Scheduled Sync**.

3. **Save or Cancel Edit:** Click the Save button to save any changes you’ve made, or the Cancel Edit button to collapse the table row without saving any changes.

Click the **View** button (🔍) to open the **View Producers with Custom Values** page will display. This page will list all individuals or firms that have this rule active on their record with a custom value. In this case, that means any producers who we have determined should NOT be included in scheduled syncs.

On this page you may take the following actions:

- Click the **Producer Type** dropdown menu and choose Individual Licensee or Firm to view a list of those entities with custom values.
- Click the producers name link to go to that producers **Review/Update** page.
- Click the delete icon (✖) to delete the custom value for that producer. This will return that producer to the default value.

Adding a Rule to a Producer Record

With the producer record open, click the **Producer Business Rules** link in the quick links section at the top of the page. The **Producer Business Rules** section will display any business rules currently active for that producer. To modify this, click the **Update Producer Business Rules** link.

Fields and controls on this page include the following:

(✎): Click the **Edit** button to expand and edit the corresponding rule.

- **Value:** Select “Yes” from the dropdown menu to customize the default business rule to apply to the selected producer, or select “No” from the dropdown menu to customize the default business rule to be suspended for the selected producer.
- **Use Default:** This button is available only for customized business rules. Click to apply the default setting for the selected business rule.
- **Save:** Click the **Save** button to commit your business rule settings to the selected producer.
- **Cancel Edit:** Click the **Cancel Edit** button to abort the edit process without committing your settings.

You’re Done!

Congratulations! You can now edit **Producer Business Rules** on a producer record, or if you are an administrator you can set up **Producer Business Rules** and make them available to be customized on a producer record.

Need More?

If you need further assistance with Vertafore Sircon products or services, contact your assigned account representative, send an email to plmsupport@vertafore.com, or open a case in the Self-Service Portal.