Sagitta® 2024 R1.2.0 Release Notes

Vertafore is pleased to release Sagitta 2024 R1.2.0. With this release, we are incrementally improving and updating Sagitta to provide you with the best possible experience.

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Enhancements

The following table summarizes the enhancements in this release. The **Feature** column indicates whether the feature is:

- Core - available when the release is loaded
- Optional - flag driven or not mandatory in the core environment

Enhancement	Description	Feature
New Home Page	Modern Home page with easy-to-use widgets	Core
Address Validation	Addresses are validated on Client Details and Additional Interests	Core
One Up Auto IDs	A single Auto ID card prints per page	Core
Production Credit	Calculate Production Credit for producers and brokers	Optional
NAICS Codes	New fields on Client Details for NAICS Codes	Optional
Renew Remarketed Policies	Renew a remarketed policy through Company Download	Optional
Prior History/Other Insurance	Policy search on the Prior History/Other Insurance page	Optional
Copy to Next Term	Copy changes to all next terms of a policy	Optional
Company Download	MHOME is supported for Company Download	Optional
Cash Receipts Web Service Updates	• Client Cash Receipts allows zero receipts • Non-client Cash Receipts allow negative receipts	Optional
Logos	Area for logo on invoices and statements has been increased	Optional
Service Fees and Related Policies page	New policy page to associate policies for Service Fees and Underlying & Related Policies	Optional

System Requirements

For optimal performance of the application, we recommend the following as a minimal workstation configuration:

Hardware/Software	Minimum Requirement/Recommendation
Processor/CPU Speed	Recommended: i5, i7 or Multi-core: 2.6 GHz or above Minimum: Core 2 Duo: 2.3 GHz or above Not Supported: Single Core, Reduced feature CPUs such as Celeron or AMD Sempron
Memory	Recommended: 16GB Minimum: 4GB
Hard Drive Space	Minimum: 150Mb of local disc space per user
Operating System	Recommended: Windows 11 Minimum: Windows 10 (64 bit)

Hardware/Software	Minimum Requirement/Recommendation
MS Office (Word, Excel)	Recommended: Office 2016 Professional Minimum: Office 2010 Professional
Browser	Recommended: Chrome Supported: Edge in IE Mode, Edge, and Chrome
.NET Framework	Minimum: .NET 4.7.2

Feedback

https://support.vertafore.com/

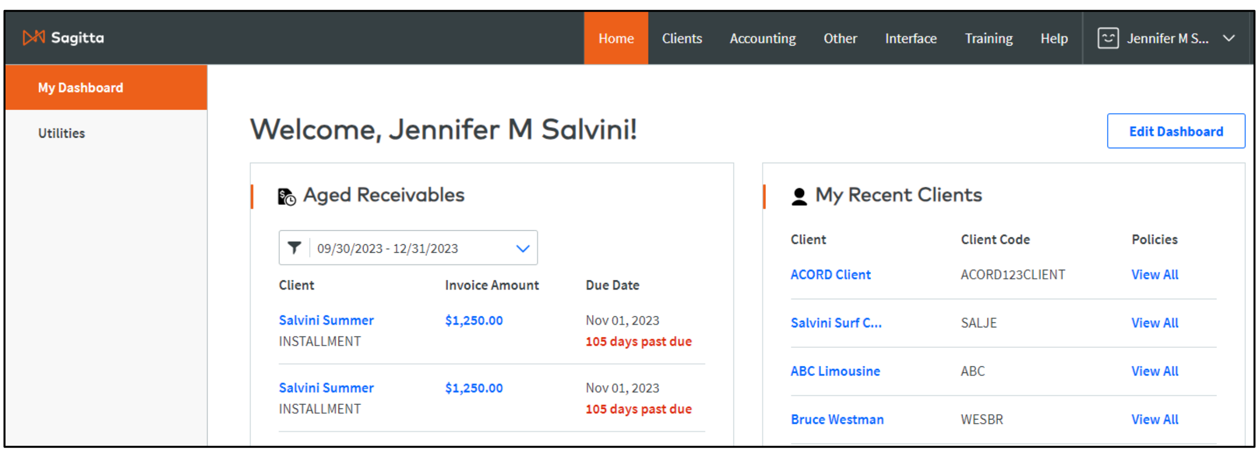
We value your feedback to ensure we are working on what is most important to you. Please use MyVertafore to provide feedback. We appreciate your input, whether positive or negative, on any visible change.

What's New

New Home Page

In 24R1, the Sagitta Home Page has a new, modern design. Welcome to My Dashboard!

You must be logged into Sagitta using Chrome or Edge (without IE Mode) to use the new Home Page.

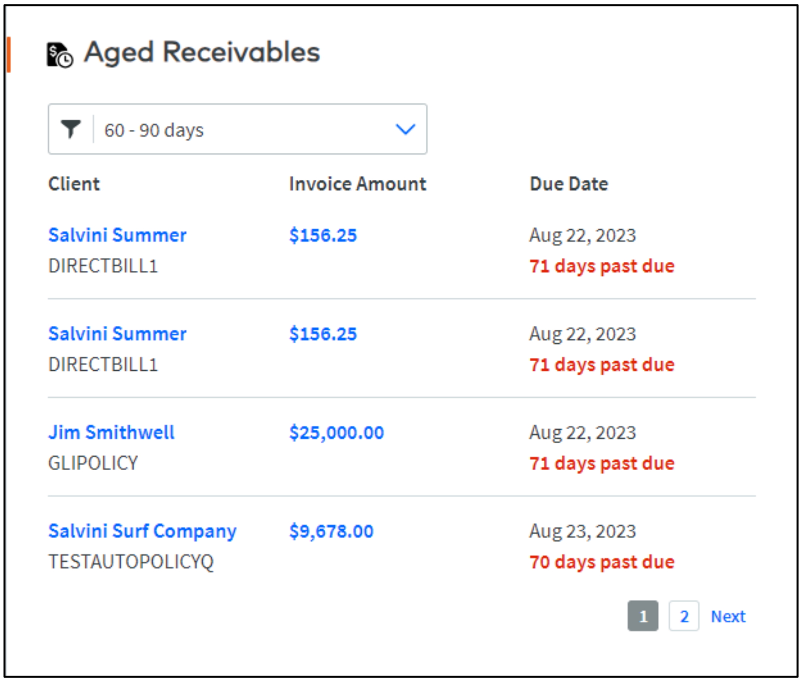


MY DASHBOARD

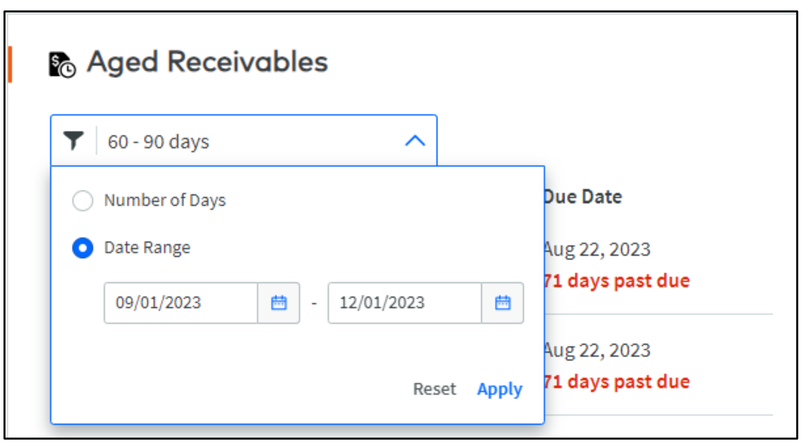
My Dashboard gathers important Sagitta data in easy-to-read widgets. The maximum items displayed in each widget is 20 entries. Widgets with a View All option, such as Processed Reports, display more than 20 entries after clicking View All.

Aged Receivables Widget

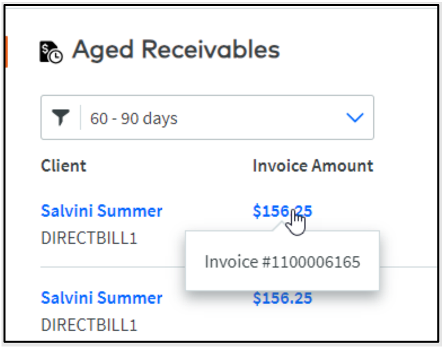
The Aged Receivables widget displays open agency bill receivables for clients where you are the invoice servicer. The Policy Number displays under the Client Name for Policy-related Invoices. Due dates are listed in ascending date order. Days past due are in descending order.



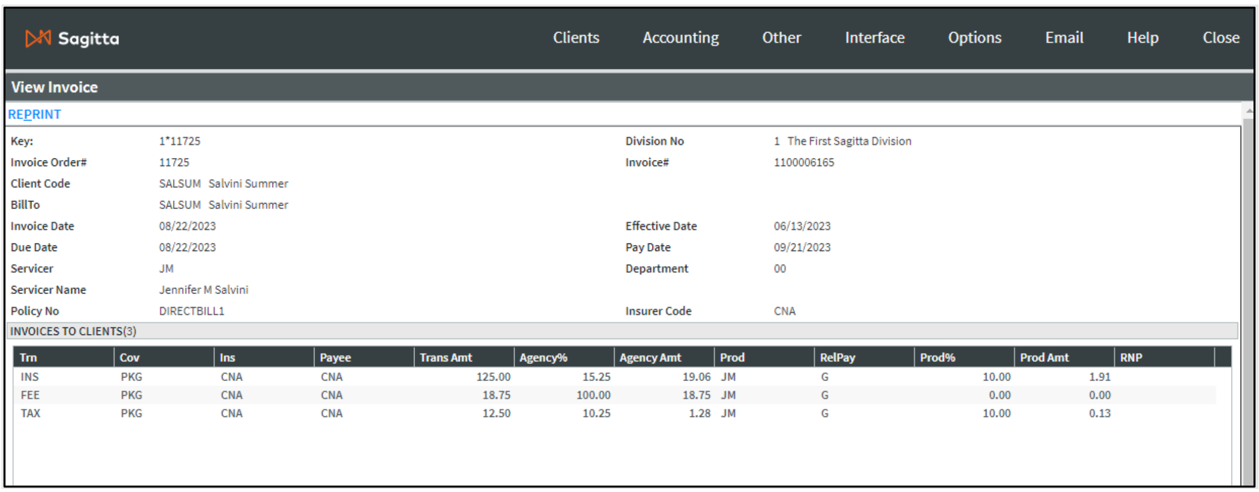
The filter dropdown allows the flexibility to display receivables by the Number of Days overdue or by the Date Range they are due. Use the drop-down on the filter to access the radio buttons for Number of Days and Date Range. For both options, the days entered cannot be higher than 365 days. Click Apply to show receivables that match the selected criteria.



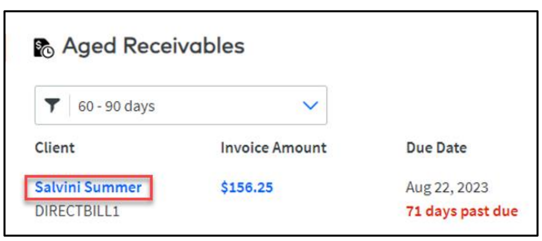
The links on the widget provide additional information about the receivable. Hover over the Invoice Amount to display the Invoice# associated with the Invoice Amount.



Click the **Invoice Amount** link to launch the *View Invoice* page and review the details on the agency bill invoice. Reprint the Invoice or close the window.



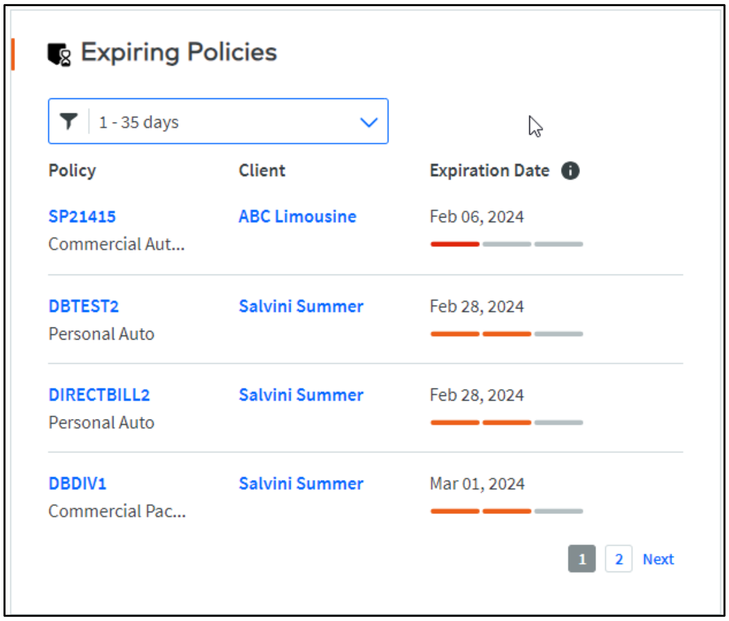
Click the **Client Name** link to launch the *Client Details* page.

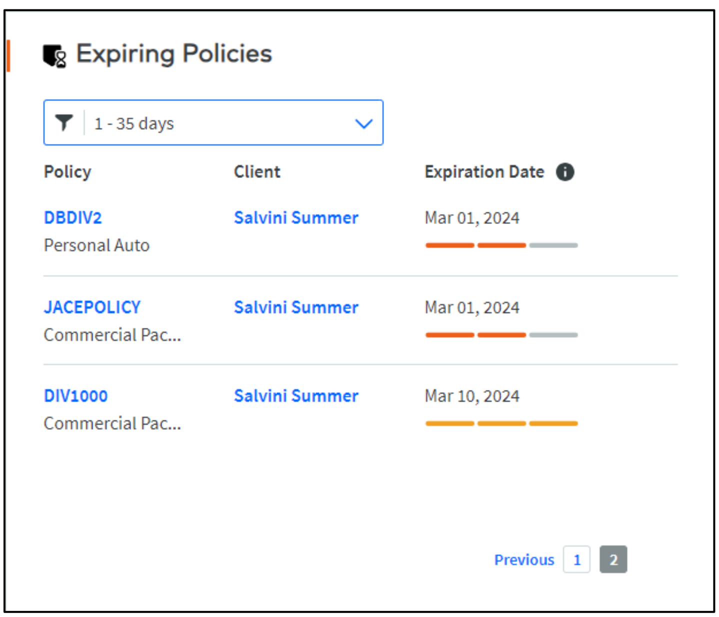


The widget refreshes automatically after invoice actions such as add, revise, void, and updating cash receipts.

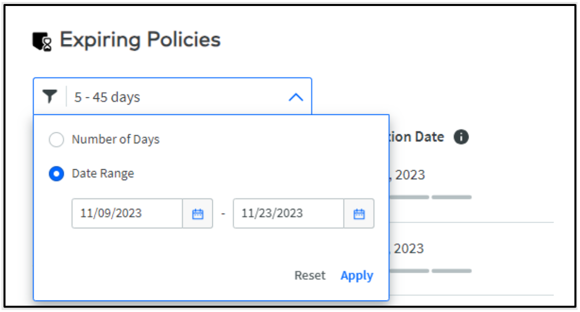
Expiring Policies Widget

The *Expiring Policies* widget displays policies that are past due for clients where you are the Policy Servicer. Policies are listed in ascending order by the expiration date.

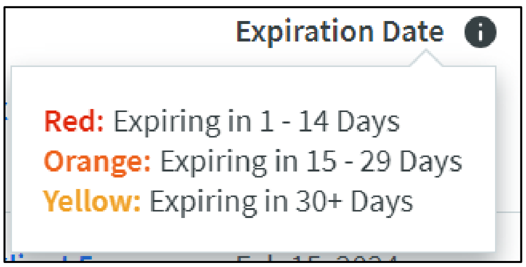




The filter allows the flexibility to display policies based on Number of Days before expiration or by a Date Range of expiration dates. Use the drop-down on the filter to access the radio buttons for *Number of Days* and *Date Range*. The days entered cannot be higher than 365 days. Click *Apply* to show results matching the selected criteria.



Hover over the i icon to reveal a tooltip showing the date ranges associated with each color used in the Expiration Date column.

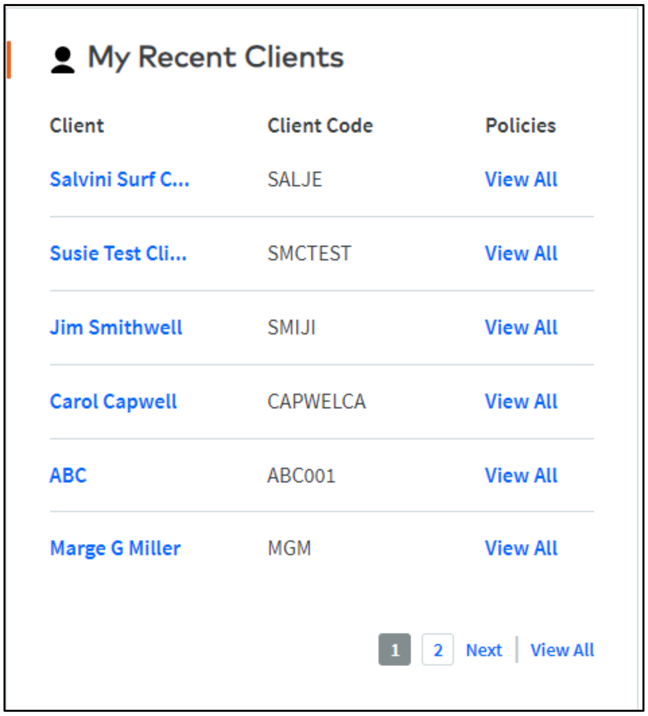


Click the **Policy** link to launch the Policy Details page.

Click the **Client** link to launch the Client Details page.

My Recent Clients Widget

The My Recent Clients Widget displays your most recently viewed Clients.



Click the **Client** link to launch the Client Details page.

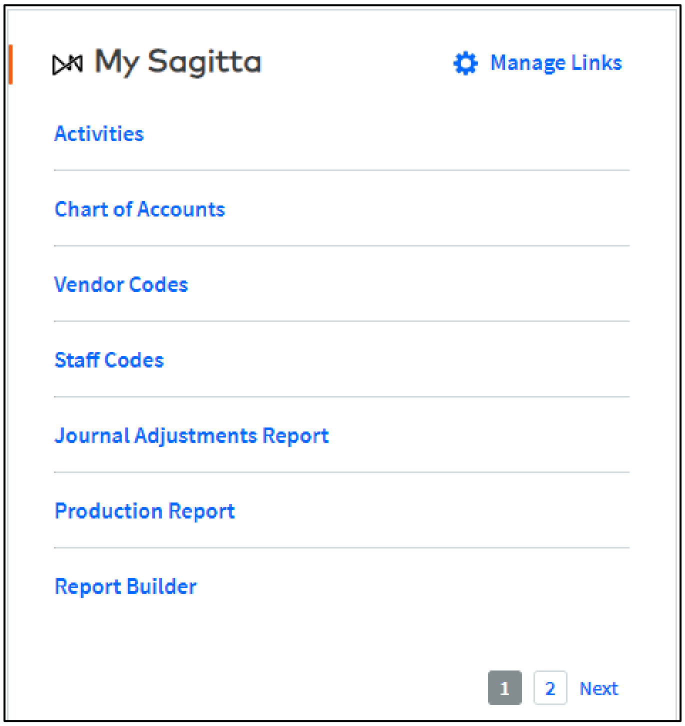
Click **View All** link on a specific client to launch the Policy Selection page.

Click the **View All** link on the bottom right corner of the page to view a complete list of recent clients on a separate page.

To alphabetize My Recent Clients, select *Settings* from the User Name drop-down on the Global Navigation and check **Alphabetize Recent Clients.**

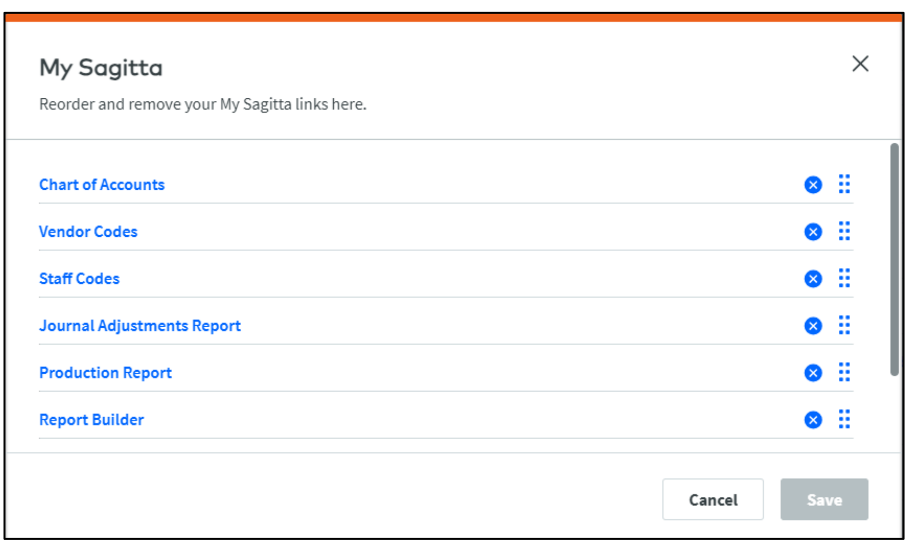
My Sagitta Widget

The **My Sagitta** widget displays the pages you added to your My Sagitta using the star on the secondary navigation bar. If Activities are available to the user, the option is displayed as the first link on the My Sagitta widget. Access to Activities is defined the user's Home Page Role and the user's Role Based Security role.



Click a link in the list to launch a new window to that page.

Click **Manage Links** to reorder or remove your My Sagitta links. **Manage Links** displays when there are links available to reorder or remove besides Activities.



To remove the page link, click the X on the line. The link is removed from the widget and from My Sagitta on the secondary navigation menu in Accounting and Other sections.

To reorder the pages, click on the line and drag and drop to the specified location.

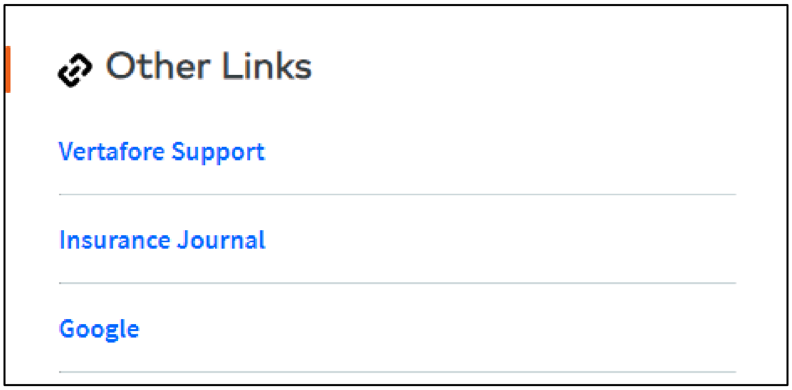
The Save button is enabled when there is a change. Click Save to complete the change and the widget refreshes.

Activities cannot be removed from the Widget.

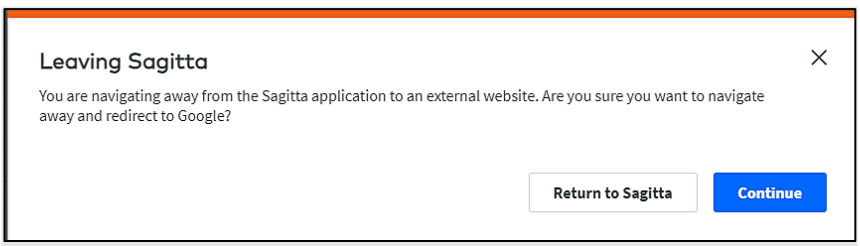
Click the Activities link to access the Activity Log.

Other Links Widget

The Other Links widget contains links to agency defined web pages, such as MyVertafore.com.



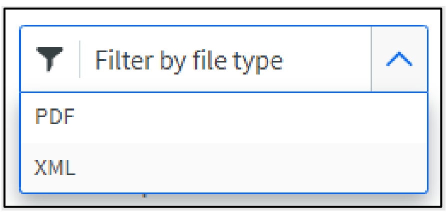
When you click a link, the following prompt displays. Click Continue to launch to the selected website.



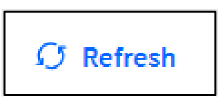
Processed Reports Widget

The Processed Reports widget displays reports generated by Overnight, Batch and Report Distribution. Click on a Report Name to launch the PDF or XML report. Reports are listed in descending order by Date Range. Collapse or keep the widget expanded based on your preference.

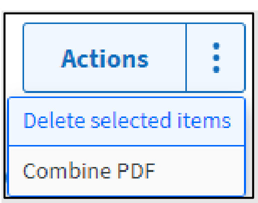
You can filter by file type of PDF or XML using the filter dropdown.



Click Refresh to update the table with new reports generated or to undo any interactions with the grid, such as deselecting the selected row(s) on the grid, disabling applied filtering, and return to the first page of the widget.

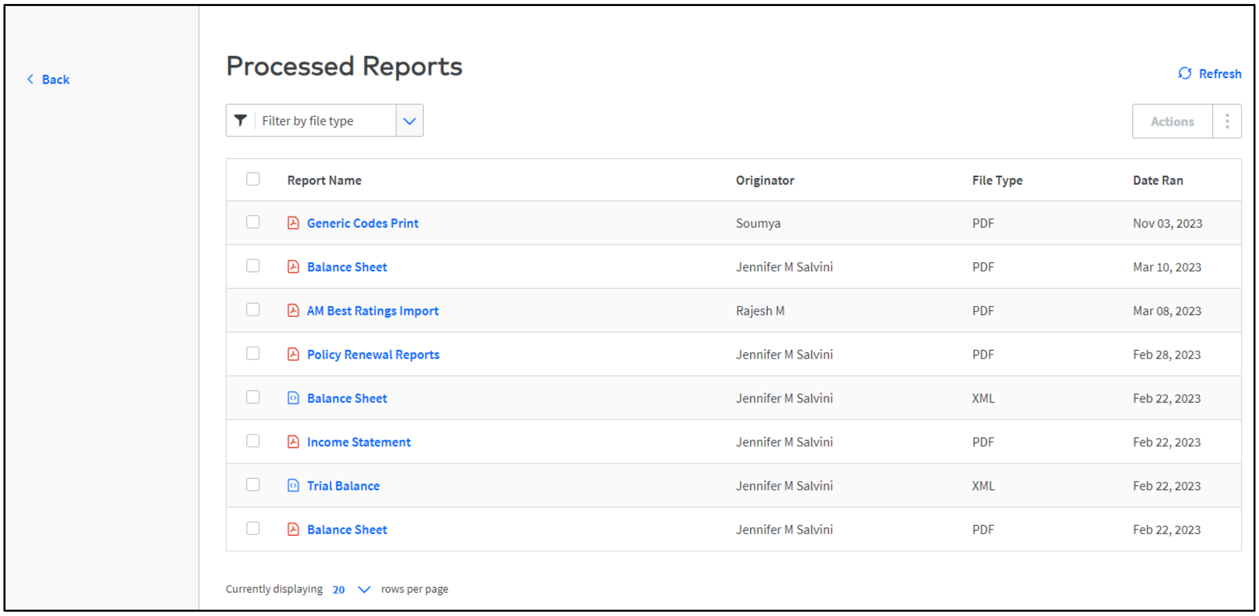


Check one or more reports to enable the *Actions* drop-down button.



- **Delete selected items** deletes the selected report
- **Combine PDF** combines several reports into one PDF. Selecting an XML with a PDF report does not provide the Combine PDF option. If selected, the report types of XML and PDF can only be deleted.

View All displays all reports in a larger window with the same functionality. Click the Back button to return to My Dashboard.



Recent Claims Widget

The Recent Claims Widget displays your most recently viewed Claims for all claim statuses. Claims are ordered with the most recent claim displayed first and the least recent claim displayed last.

Click the **Claim** link (Loss ID) to launch the policy Claim page. Auto refresh will trigger changes performed to claims and reflect them on the widget.

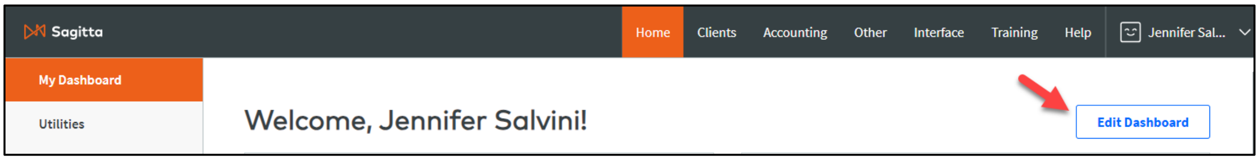
The Loss Type displays underneath the Loss ID.

Click the **Client** link to launch the Client Details page.

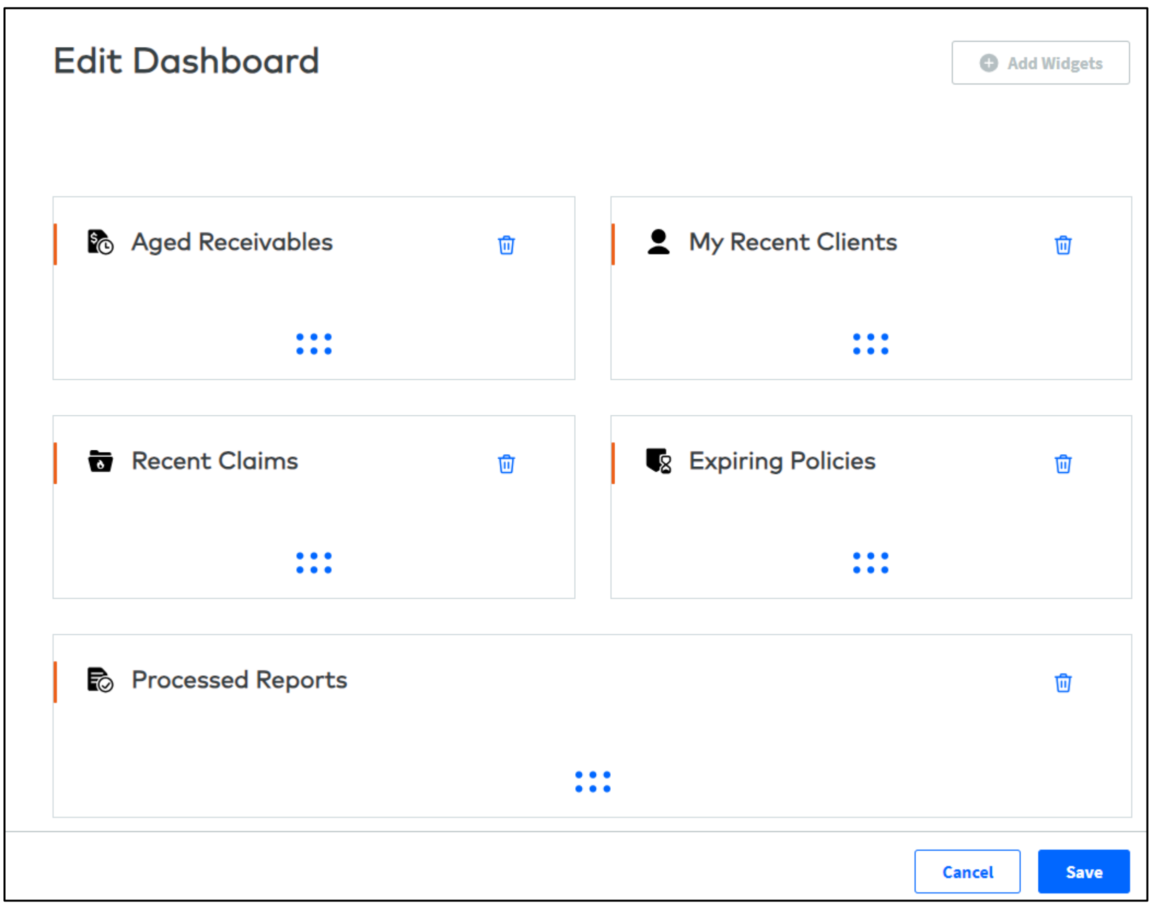
If a user has 20 recent claims on the widget and a claim is opened, updated, or created , the oldest claim in the list is removed. The newly updated, viewed, or created claim is first in the list, as it the most recent.

Edit Dashboard

You can edit the layout of the dashboard, add widgets, or remove widgets that are personalized to your role.



Click Edit Dashboard to reorder or remove a widget.



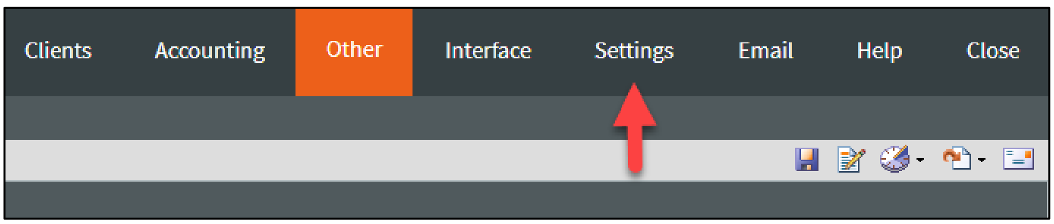
- Click on the trashcan to remove a widget from your Home Page.
- Click on a widget to drag and drop to a different location.
- Click Save to implement your changes and return to My Dashboard.
- Click Add Widgets to add available widgets that you had previously removed from My Dashboard.
- Click Cancel to discard changes.

You can remove all widgets except for one, leaving the last widget on the Dashboard

Options renamed to **Settings**

On the Home Page, **Options** on the Global Navigation has been removed and is now available under the user drop-down **Settings**.

Options in the Global Navigation menu on other pages is renamed to **Settings.**

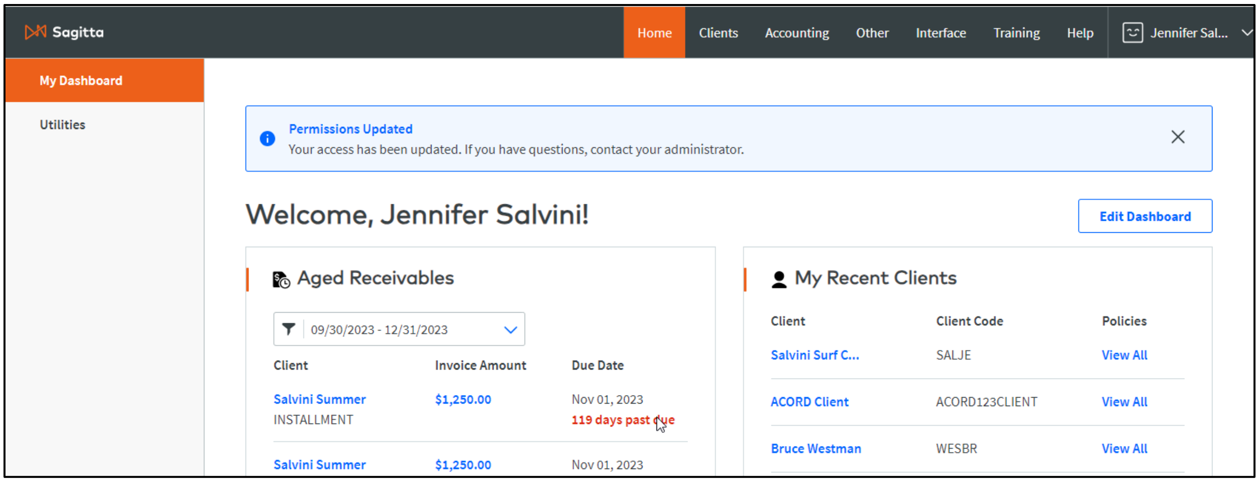


NOTIFICATIONS

As an administrator, changing any Home Role or Role Based Staff Code pushes a notification to the corresponding user or group of users for the next time they login. The notification populates as a blue bar across the top of My Dashboard, **Permissions Updated: Your access has been updated. If you have questions, contact your administrator**. **S**electing X on the Permissions Updated notification banner or logging out removes the notification.

The notification message is created in the following cases:

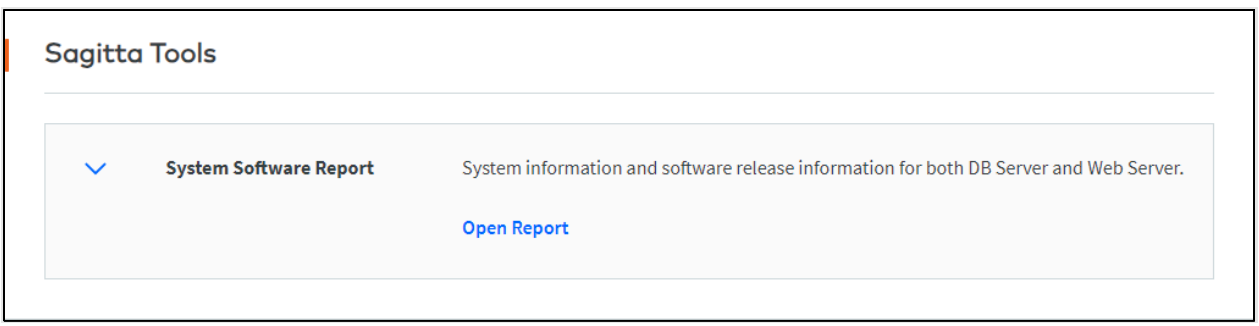
1. Changes to the Home Role or Security Role for a Staff Code create an individual notification to that user.
2. Changes to Home Role page create a notification to all users that are assigned to that Home Role.
3. Changes to Role Based Security page to update the permissions of a page, or adding/removing a page, create a notification to all users assigned. However, if a new staff code is added to an existing role or removed from a role, only that user will receive a notification.



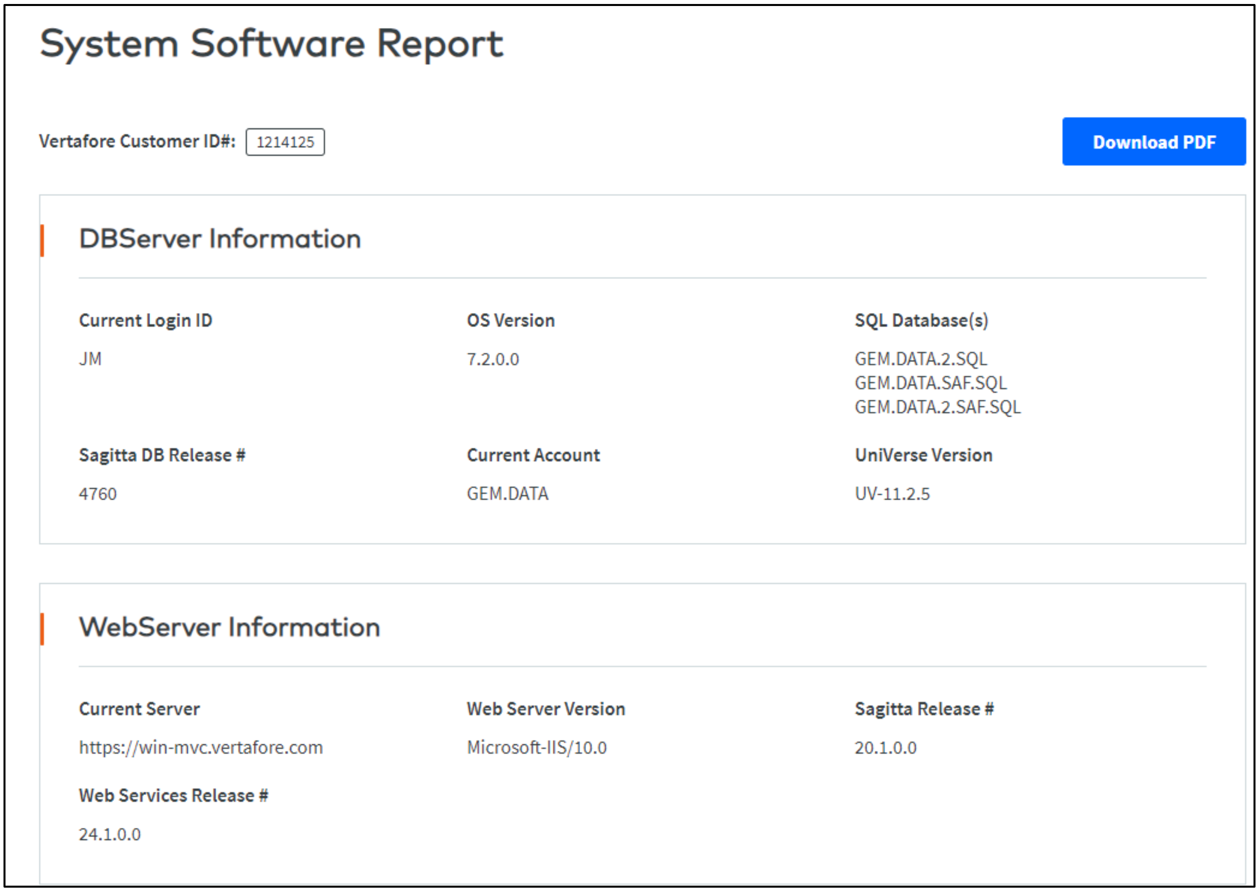
UTILITIES

The Utilities tab on the Home Page displays the Sagitta Tools, Templates, and Vertafore Services sections.

Sagitta Tools

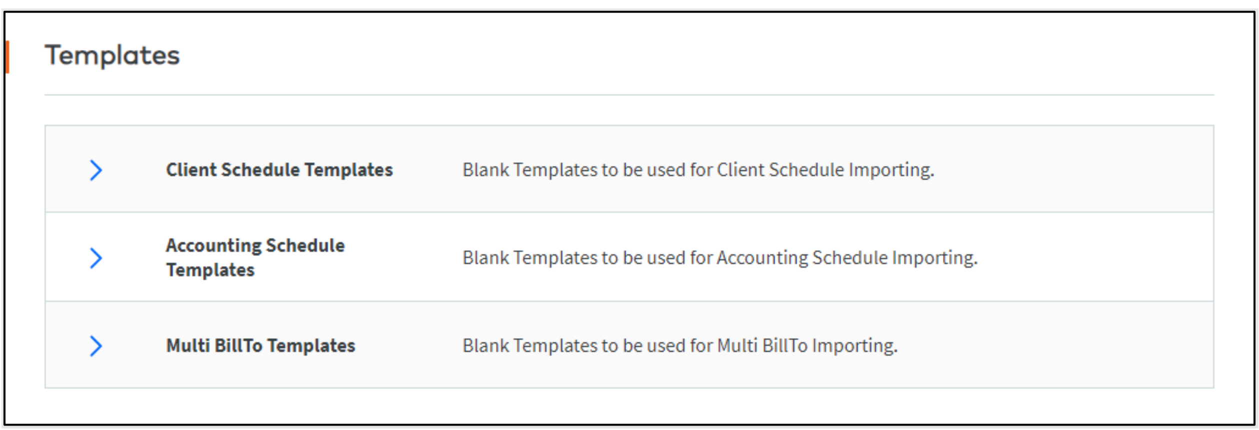


- Use the drop-down in the Sagitta Tools section to access the System Software Report.
- Click Open Report to display the System Software Report.



- Click **Download PDF** to download the report as a PDF.

Templates



- Use the drop-down in the Templates section to access Client Schedule, Accounting Schedule, or Multi BillTo Templates
- Click XML to download the XML template

Vertafore Services

- Vertafore Services lists the pages that you have access to as an administrator.
- If you are not an administrator for these pages, the message, *No Vertafore Services links available,* displays.

MY DASHBOARD PERSONALIZATION

The Home Page is personalized by the Home Page Role on your Staff Code. You can personalize each Home Page Role to determine the widgets to be available on My Dashboard. You can also change the Widget name. For example, Activities can be changed to To Do or Other Links can be changed to Quick Links.

These widgets are loaded to all home roles:

Target Page	Widget Text
CP_179.ASP	Activities Note: This option is displayed on My Sagitta and is not a widget.
AGEDRECEIVABLES.WIDGET	Aged Receivables
EXPIRINGPOLICIES.WIDGET	Expiring Policies
MYCLIENTS.ASP	My Recent Clients
MYSAGITTA.ASP	My Sagitta
MYFAVORITES.ASP	Other Links
RECENTCLAIMS.WIDGET	Recent Claims
VERTAFORESERVICES.ASP	Vertafore Services Note: This option is on the Utilities page and is not a widget.

There is no Target Page for Processed Reports as every user will have access to this widget.

SAGITTA API CHANGE TO SUPPORT NEW HOME PAGE

As part of the 24R1.2.0 installation process, the Sagitta API keys are automatically refreshed if they have expired or will expire within the next 10 days. The Sagitta API keys will also automatically refresh as part of the Overnight Process when their expiration date is within 10 days.

Previously, the staff codes in the **Security Keys Expiration Notifications** field on the Vertafore Services Personalization page would have received an activity/memo with the description shown in the screen print below and would have had to click the **Generate Sagitta Api Keys** button.

MEMO DESCRIPTION

SG API Security Keys Expiration Warning ---

Your Sagitta API Security Keys will expire on 02/16/2022

Please refresh they keys by clicking 'Generate Sagitta API Keys' on the Vertafore Services Personalization page.

Note that features using Sagitta API, like the SalesForce integration, will not be available after this date until the keys are reset.

The activity will no longer be displayed since the Sagitta API keys will now be automatically refreshed.

In the unlikely event that a problem occurs with the Sagitta API keys being refreshed, the following new activity will be created.

MEMO DESCRIPTION

CRITICAL Sagitta APIs Security Keys Error ---

An error occurred creating and or updating the security keys.

Please refresh the keys by clicking 'Generate Sagitta API Keys' on the Vertafore Services Personalization page.

Features or integrations using Sagitta APIs will NOT work until the keys are reset.

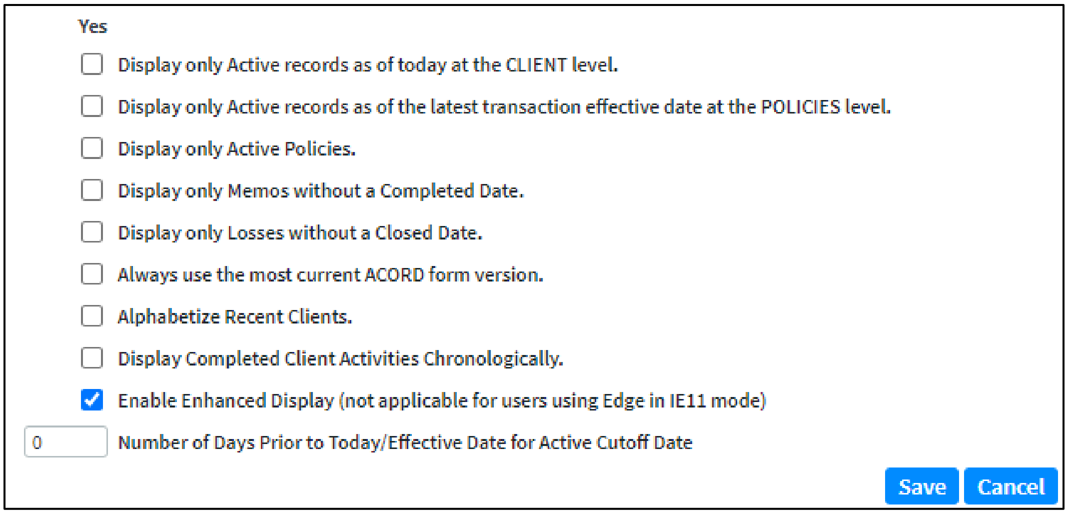
Once the keys expire on 02/05/2025, users using Enhanced Mode will not be able to login!

If this error continues to occur, please contact your System Administrator.

This new activity will be sent to the Staff codes setup in the **Security Keys Expiration Notifications field** on the Vertafore Services Personalization page. If there are no Staff codes set up in this field, the activity will be sent to the staff set up on the Overnight UTM Process Parameters page within the **Staff Id for UTM reports** field.

If the critical activity is not resolved, any users that have Enhanced mode setting, will not be able to log in. In addition, any features or integrations that utilize Sagitta APIs will not work until the keys are reset. Enhanced mode is enabled for all users automatically after the 24R1 upgrade.

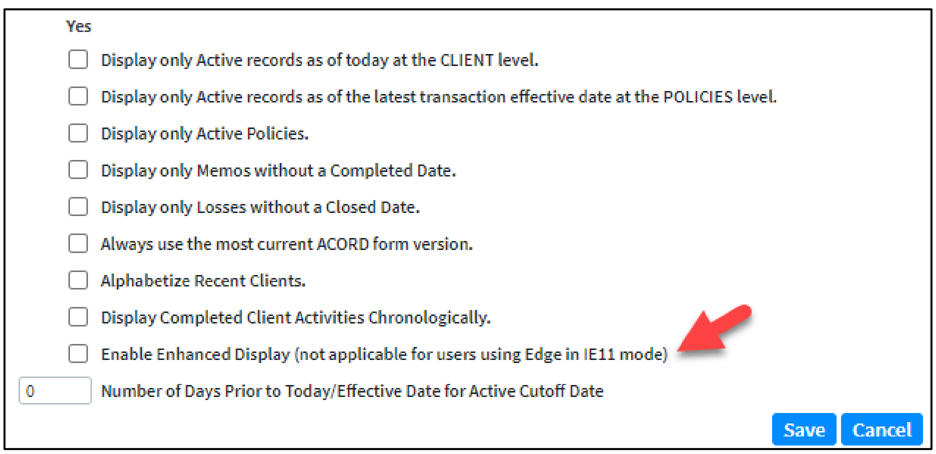
Users that are set up to have this checkbox disabled, will continue to be able to login.



To resolve the above Critical activity, the System Administrator can navigate to the Vertafore Services Personalization page and select the Generate Sagitta Api Keys button in the Sagitta API section.

DISABLING NEW HOME PAGE

Select Settings from the User Name drop-down on Global Navigation and uncheck **Enable Enhanced Display (not applicable for users using Edge in IE11 mode)**. Log out of Sagitta and back in. The Classic Home Page displays.



PREREQUISITE STEPS TO USE MY DASHBOARD

⚠ The 24R1 Deployment Guide includes prerequisites to consider prior to loading 24R1, to load this release without introducing log in errors. Review this prior to loading 24R1 to ensure that users will be able to log in and access My Dashboard once the release has been installed. If this is not done and there are issues to resolve, loading 24R1 will cause users to not be able to log in.

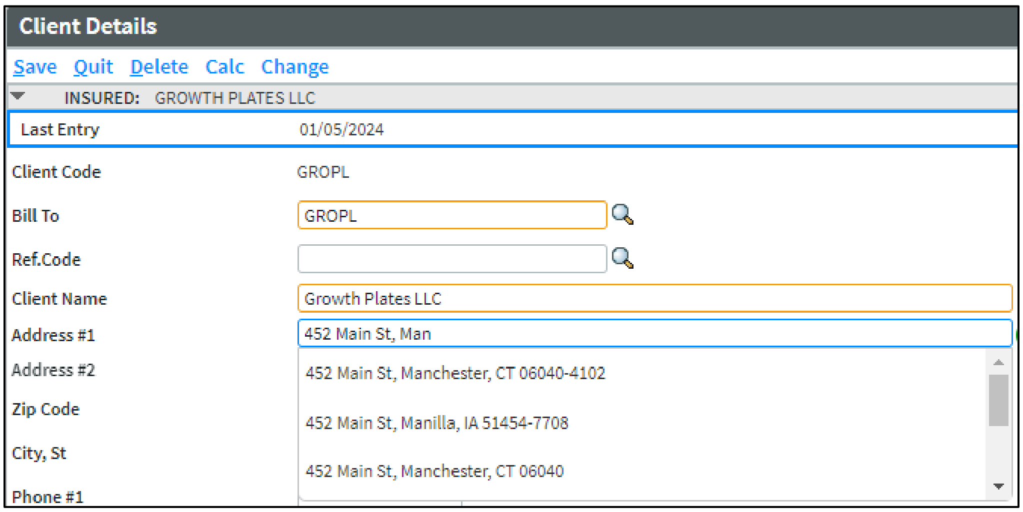
Watch the demo on the new Home Page

Address Validation on Clients and Additional Interests

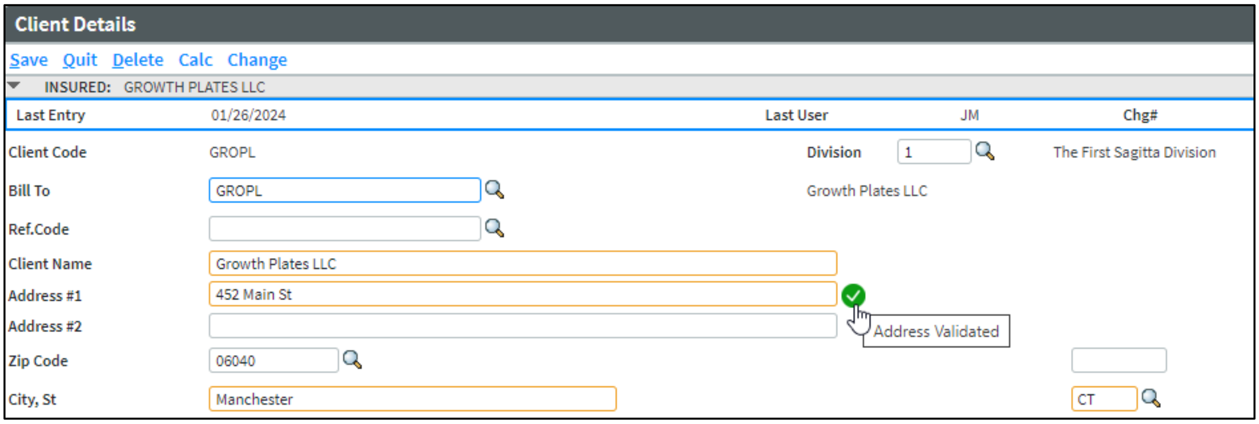
Client and Additional Interest addresses now use an API called Melissa Data to perform address lookups for US addresses. Search using type-ahead auto-completion in the Address #1 or Mail Address field to select the best match. An address validation indicator checkmark (Melissa Address Key or MAK in Report Builder and ODBC) next to the Address section displays different colors of verification.

CLIENT DETAILS ADDRESS VALIDATION

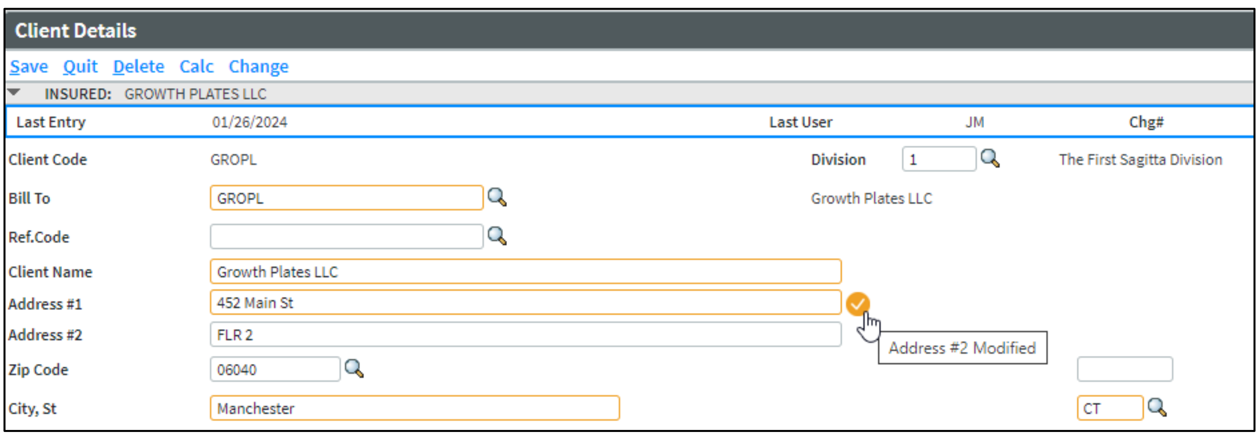
On the Client Details page, valid addresses display in a drop-down after typing 2 characters in the Address #1 field. Continue typing until the desired address displays. Select the address to prefill the Address #1, City, State, and Zip Code. Usually, Address #2 does not populate from Melissa Data, but it can be added manually.



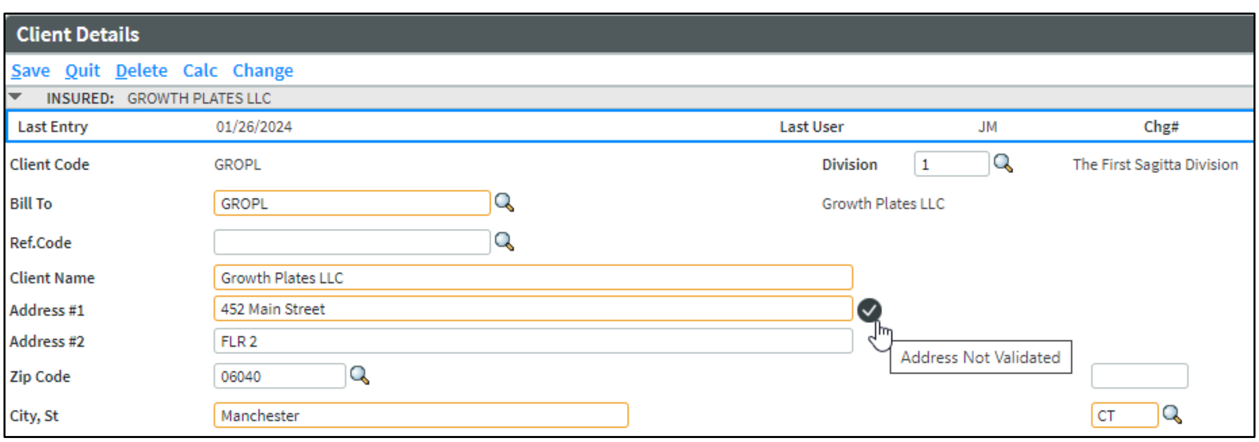
After the address populates, the checkmark next to the address displays **Green**. Hover over the check mark to display a tooltip of **Address Validated**.



The checkmark displays **Yellow** when Address #2 is entered. Hover over the check mark to display a tooltip of **Address #2 Modified.**



The checkmark displays **Gray** when Address #1, City, State or Zip Code is modified or when a user bypasses the drop-down options and manually enters the address. Hover over the check mark to display a tooltip of **Address Not Validated.**

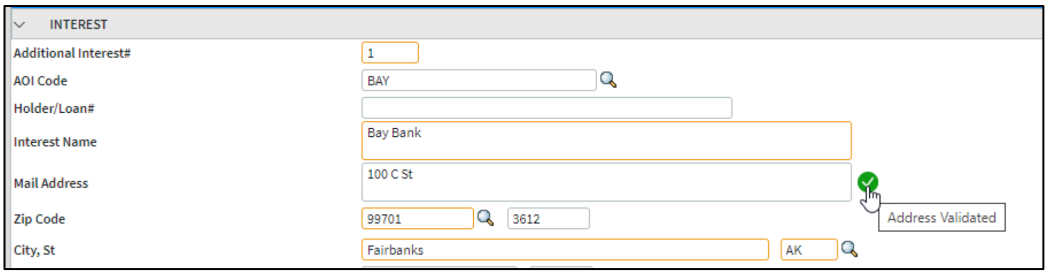


If an Address in Client details and Additional Interests page is not previously validated but is a valid address presented in Melissa Data, clicking on the checkmark will validate the address by turning green.

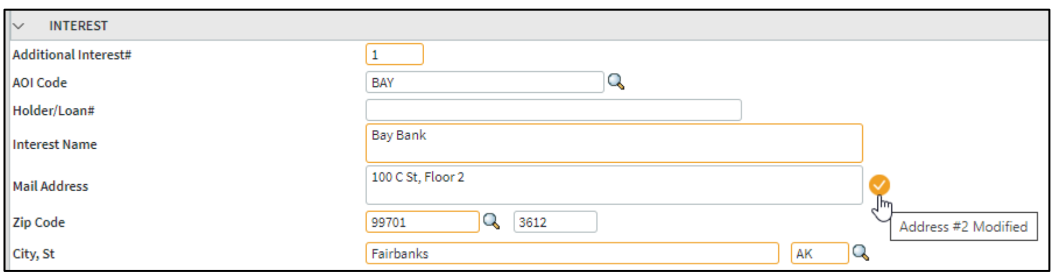
ADDITIONAL INTERESTS ADDRESS VALIDATION

Address Validation has been added to the Mail Address field on the Client Level and Policy Level Additional Interests pages, and the Additional Interests Maintenance page. Valid addresses display in a drop-down after typing 2 characters in the Mail Address field.

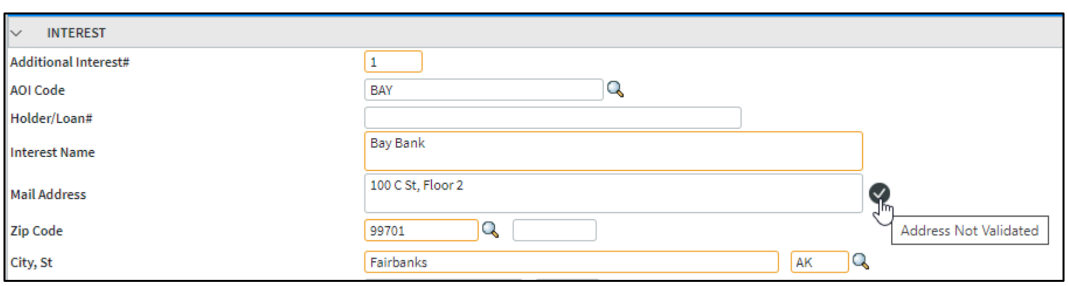
After the address populates, the checkmark next to the address displays **Green**. Hover over the check mark to display a tooltip of **Address Validated**.



Since the Additional Interests page does not have a separate field for Address Line #2, a comma is used for the delineation between Address #1 and Address #2. When a comma is added to the end of a valid Address #1, the green checkmark will turn yellow, with the tooltip of **Address #2 Modified.**



The checkmark displays **Gray** when Address #1, City, State or Zip Code is modified or when a user bypasses the drop-down options and manually enters the address. Hover over the checkmark to display a tooltip of **Address Not Validated.**



To validate the address, click the checkmark. If a single address is found to match to, it will turn **Green** if there are no additional address lines entered, or **Yellow** if there are. If not, the possible addresses will display in a dropdown on the Mail Address field.

Processes that Affect AOI Address Validation

The Additional Interests address validation checkmark is carried forward or updated based on changes made in other programs. If the Additional Interest address is changed from the validated address on the policy, the Address Validation checkmark color will change accordingly.

- Programs that could change the Address Validation checkmark:
    - Company Download
    - ProducerPlus
    - Schedules Import

- The Address Validation checkmark for Additional Interests carries forward on these processes:
    - Client Schedules Import (when imported using an exported list from a policy)
    - Copy/Merge to another policy
    - Copy/Next to the next term
    - Renewing a policy
    - Remarketing a policy
    - Rewriting a policy
    - Copying Client Level Additional Interests to a Policy Level Additional Interest
    - Adding an Additional Interest to a client that has been validated in Additional Interests Maintenance page.

ADDRESS VALIDATION TIPS

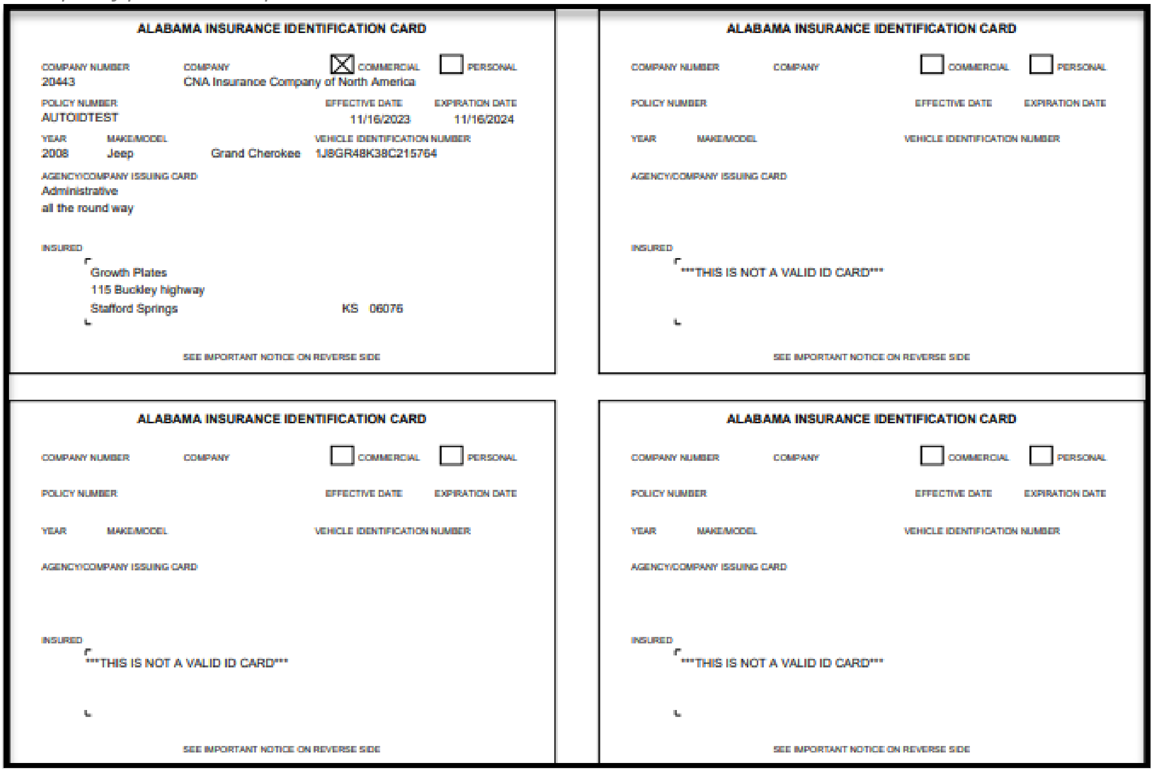
- When an address with a Zip Code that does not exist in the Sagitta database is selected from the drop-down options, the new zip code is added to the ZIPS file.
- P.O. Box numbers are returned without the periods, e.g., PO.
- Most P.O. Box numbers are not included as part of the validated address drop-down options.
- Search for Apartment using Apt or Suite using Ste. or Ste (Suite).

Watch the demo on Address Validation

One-Up Auto IDs

Auto ID cards (ACORD 50, 51, 52 and 53 cards) now print one card per page instead of multiple cards per page. All cards are printed in Portrait format with the front or Page 1 shown at the top of the page, and the back or Page 2 shown at the bottom of the page. This change is not applicable to New York Auto ID cards.

Example of previous 4-Up Alabama Auto ID Card



ALABAMA INSURANCE IDENTIFICATION CARD

COMPANY NUMBER 20443
COMPANY CNA Insurance Company of North America
☒ COMMERCIAL ☐ PERSONAL
POLICY NUMBER AUTOIDTEST
EFFECTIVE DATE 11/16/2023
EXPIRATION DATE 11/16/2024
YEAR 2008
MAKE/MODEL Jeep Grand Cherokee
VEHICLE IDENTIFICATION NUMBER 1J8GR48K38C215764
AGENCY/COMPANY ISSUING CARD
Administrative
all the round way
INSURED
Growth Plates
115 Buckley highway
Stafford Springs KS 06076

SEE IMPORTANT NOTICE ON REVERSE SIDE

ALABAMA INSURANCE IDENTIFICATION CARD

COMPANY NUMBER
COMPANY
☐ COMMERCIAL ☐ PERSONAL
POLICY NUMBER
EFFECTIVE DATE
EXPIRATION DATE
YEAR
MAKE/MODEL
VEHICLE IDENTIFICATION NUMBER
AGENCY/COMPANY ISSUING CARD
INSURED
THIS IS NOT A VALID ID CARD

SEE IMPORTANT NOTICE ON REVERSE SIDE

ALABAMA INSURANCE IDENTIFICATION CARD

COMPANY NUMBER
COMPANY
☐ COMMERCIAL ☐ PERSONAL
POLICY NUMBER
EFFECTIVE DATE
EXPIRATION DATE
YEAR
MAKE/MODEL
VEHICLE IDENTIFICATION NUMBER
AGENCY/COMPANY ISSUING CARD
INSURED
THIS IS NOT A VALID ID CARD

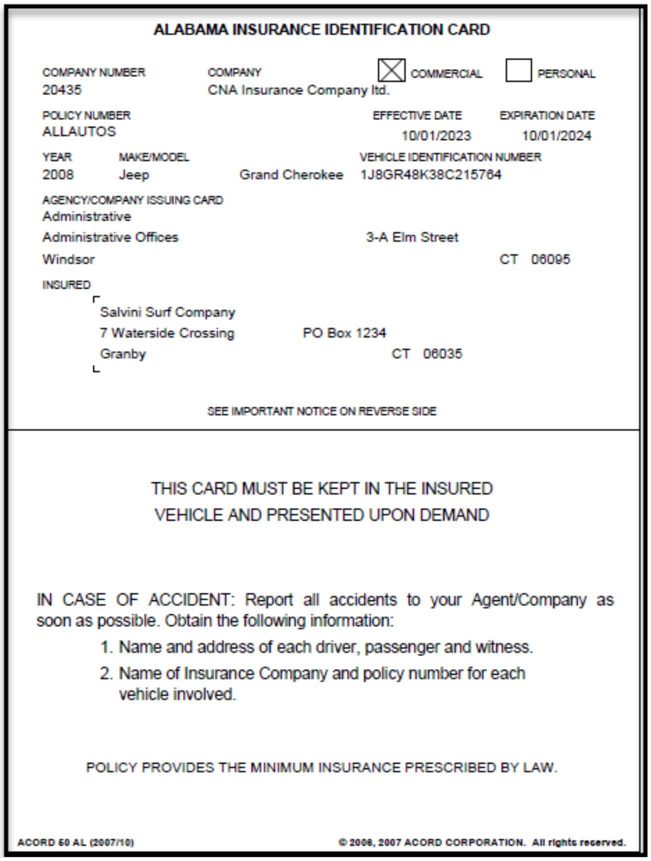
SEE IMPORTANT NOTICE ON REVERSE SIDE

ALABAMA INSURANCE IDENTIFICATION CARD

COMPANY NUMBER
COMPANY
☐ COMMERCIAL ☐ PERSONAL
POLICY NUMBER
EFFECTIVE DATE
EXPIRATION DATE
YEAR
MAKE/MODEL
VEHICLE IDENTIFICATION NUMBER
AGENCY/COMPANY ISSUING CARD
INSURED
THIS IS NOT A VALID ID CARD

SEE IMPORTANT NOTICE ON REVERSE SIDE

New 1 Up Alabama Auto ID



ALABAMA INSURANCE IDENTIFICATION CARD

COMPANY NUMBER 20435
COMPANY CNA Insurance Company ltd.
☒ COMMERCIAL ☐ PERSONAL

POLICY NUMBER ALLAUTOS
EFFECTIVE DATE 10/01/2023
EXPIRATION DATE 10/01/2024

YEAR 2008
MAKE/MODEL Jeep Grand Cherokee
VEHICLE IDENTIFICATION NUMBER 1J8GR48K38C215764

AGENCY/COMPANY ISSUING CARD
Administrative
Administrative Offices 3-A Elm Street
Windsor CT 06095

INSURED
Salvini Surf Company
7 Waterside Crossing PO Box 1234
Granby CT 06035

SEE IMPORTANT NOTICE ON REVERSE SIDE

THIS CARD MUST BE KEPT IN THE INSURED VEHICLE AND PRESENTED UPON DEMAND

IN CASE OF ACCIDENT: Report all accidents to your Agent/Company as soon as possible. Obtain the following information:

1. Name and address of each driver, passenger and witness.
2. Name of Insurance Company and policy number for each vehicle involved.

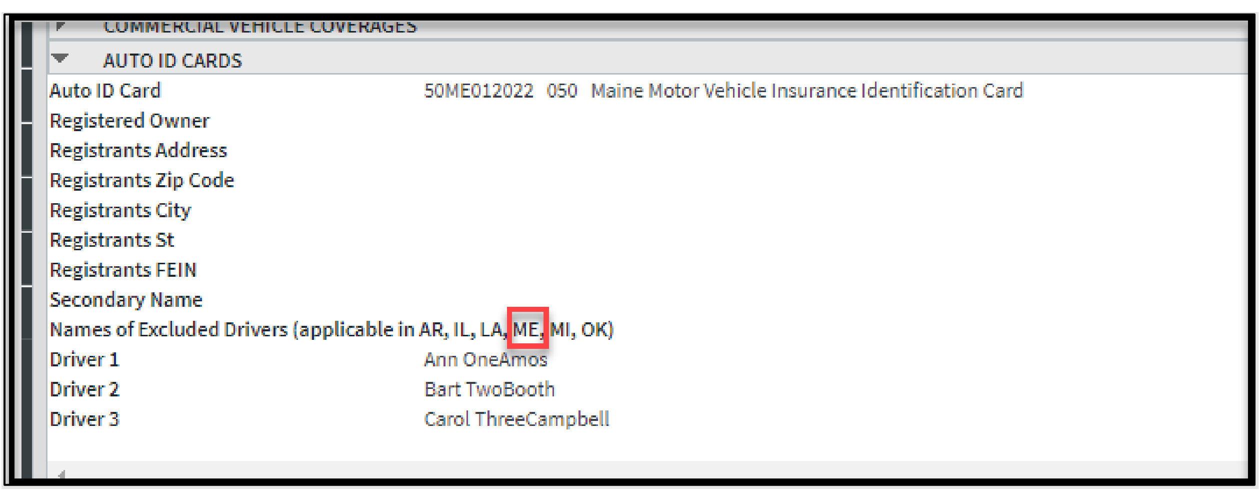
POLICY PROVIDES THE MINIMUM INSURANCE PRESCRIBED BY LAW.

ACORD 50 AL (2007/10)

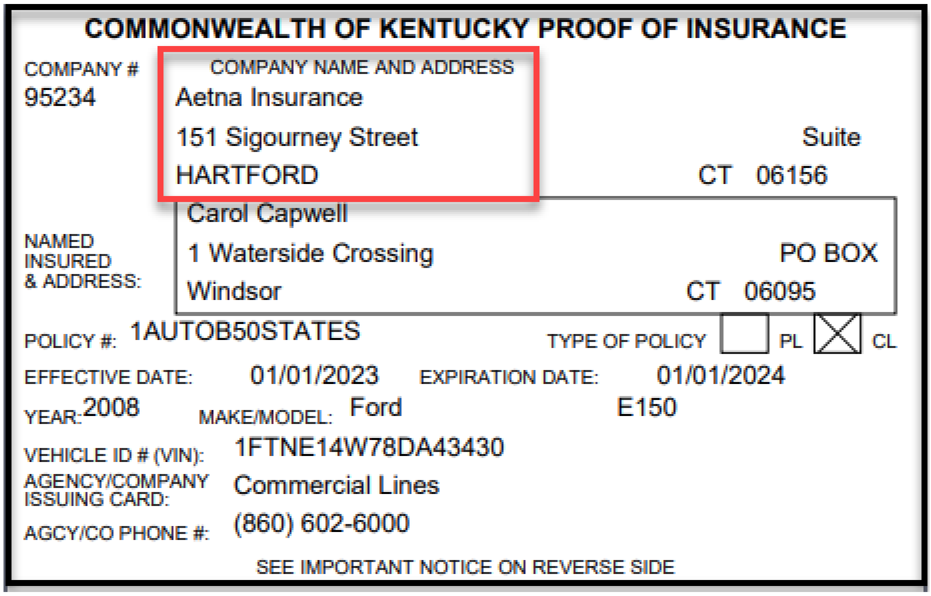
Along with changing Auto IDs to one card per page, new card editions were added to Sagitta. The complete list can be found in the New Additions to Vertafore Acord Library section in this document.

Notable Changes to Auto IDs include:

- The New Maine Auto ID ACORD 50 and 51 (2022/01) has Names of Excluded Drivers on the back of the card. The **Names of Excluded Drivers** field within the Auto ID Cards section of the policy level Vehicles page has been modified to include the state of Maine.



- The second line of the address field for Company Name and Address prefills for state cards that have a second address field



COMMONWEALTH OF KENTUCKY PROOF OF INSURANCE

COMPANY #
95234

COMPANY NAME AND ADDRESS
Aetna Insurance
151 Sigourney Street Suite
HARTFORD CT 06156

NAMED INSURED & ADDRESS:
Carol Capwell
1 Waterside Crossing PO BOX
Windsor CT 06095

POLICY #: 1AUTOB50STATES TYPE OF POLICY PL X CL

EFFECTIVE DATE: 01/01/2023 EXPIRATION DATE: 01/01/2024

YEAR: 2008 MAKE/MODEL: Ford E150

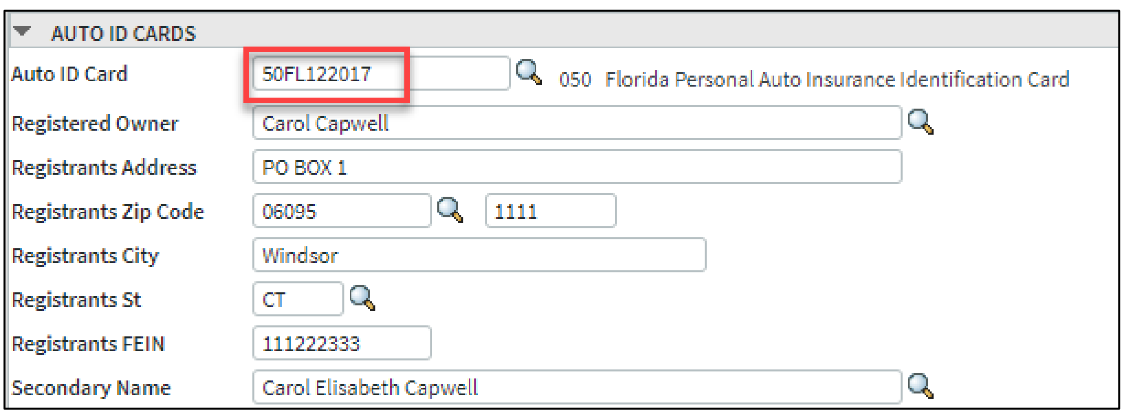
VEHICLE ID # (VIN): 1FTNE14W78DA43430

AGENCY/COMPANY ISSUING CARD: Commercial Lines

AGCY/CO PHONE #: (860) 602-6000

SEE IMPORTANT NOTICE ON REVERSE SIDE

- When 24R1 is loaded, a post upgrade program updates any Vehicles that has specific Auto ID cards personalized to the new one-up version of the card. New York vehicles, and vehicles with state cards personalized that were already at the most recent version, and in the correct one-up format (AR, CA, GA, IA, MD, ND, and UT) are not updated.
- The ACORD 51 FL has been removed and will be replaced on the Vehicles page with the ACORD 50 FL.



- **Format For Duplex** is no longer applicable for One-Up Auto ID cards except for:
  - NY Auto IDs, which remain unchanged, and
  - TX Auto IDs. When ***Format for Duplex*** is checked, the card prints with Portrait layout. When **Format for Duplex** is not checked, the card prints in Landscape layout.

TROUBLESHOOTING FOR AUTO ID CARDS

In support of the new Auto ID Cards, XML export has been added to aid in troubleshooting in case of errors. Highlight an Auto ID form set, right click, and select Export. An XML is generated that can be shared with Customer Support to troubleshoot Auto ID issues.

Auto ID Cards

Add | View | Revise | Modify Description

Veh #	Client Veh #	Year	Make	Model	Body Type	VIN
5	505	2001	Chevrolet	Express	TK	1GCHG35R711136368
5	505	2001	Chevrolet	Express	TK	1GCHG35R711136368
10		1983	GMC	Rotary Dump	DMPTK	1GDS8C4X7DV503306

Export

This XML file does not appear to have any style information associated with it. The document tree is shown below.


```
<formset xmlns="http://services.vertafore.com/eforms">
  <formdata>
    <revisionid>beffbf38-26d5-42d8-a440-9192451642e2</revisionid>
    <fields>
      <field>
        <name>Form_CompletionDate_A</name>
        <value>2024-03-19</value>
      </field>
      <field>
        <name>Insurer_FullName_A</name>
        <value>CNA Insurance Company ltd.</value>
      </field>
      <field>
        <name>Insurer_MailingAddress_AddressLineOne_A</name>
        <value>1 Continental Casualty Way</value>
      </field>
      <field>
        <name>Insurer_MailingAddress_AddressLineTwo_A</name>
        <value>Suite 100</value>
      </field>
      <field>
        <name>Insurer_MailingAddress_CityName_A</name>
        <value>Windsor</value>
      </field>
      <field>
        <name>Insurer_MailingAddress_PostalCode_A</name>
        <value>06095</value>
      </field>
      <field>
        <name>Insurer_MailingAddress_StateOrProvinceCode_A</name>
        <value>CT</value>
      </field>
      <field>
        <name>Insurer_Primary_PhoneNumber_A</name>
        <value>(860) 602-2022</value>
      </field>
      <field>
        <name>Loss_LossReport_PhoneNumber_A</name>
        <value>(765) 234-5678</value>
      </field>
      <field>
        <name>Insurer_EmergencyContactIndicator_A</name>
        <value>1</value>
      </field>
      <field>
        <name>Producer_FullName_A</name>
        <value>The First Sagitta Division</value>
      </field>
      <field>
        <name>Producer_MailingAddress_CityName_A</name>
        <value>Windsor</value>
      </field>
```


New York Auto IDs use the same export workflow but generate a different file (JSON). In the following scenarios,

- Multiple vehicles with <u>ALL</u> NY Auto IDs do not export an XML
- Multiple vehicles with <u>SOME</u> NY Auto IDs, generate the XML for the Non-NY Auto IDs.
- Multiple vehicles with <u>NO</u> NY Auto IDs, generate the XML

Watch the [demo] on One-Up Auto IDs

Production Credit

Production Credit allows for an allocation of producer compensation that is separate from their producer commission. New fields exist on the Client Multi and Policy Multi pages to support new producer types and Production Credit percentages. When an invoice is created using the Multi page, a Production Credit amount is calculated against the Agency Commission. The Production Credit amount is displayed on the Policy Invoice page and flows to an exported Production Report. The amounts do not affect Financials.

PRODUCTION CREDIT PERSONALIZATION

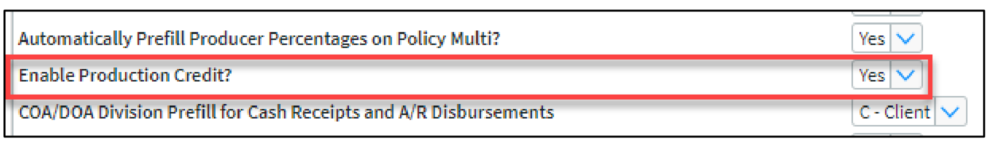
Production Credit is optional and must be enabled if your agency wishes to use it. Follow the personalization steps to start using Production Credit.

1. Enable Production Credit in *Accounting Flags*. Go to Other > Maintenance > Accounting.
2. Create Producer Types in *Generic Codes*. Go to Other > Maintenance > Policy.
3. Assign a Producer Type in *Staff Codes*. Go to Other > Maintenance > Accounting.

Enable Production Credit in Accounting Flags

There is a new flag for Production Credit Accounting Flags called **Enable Production Credit?** After 24R1 is loaded, the flag is set as blank which is the same as No.

- Yes - the fields on the Multi screens are mandatory and perform calculations based on Producer Type set in personalization.



- No or blank - the fields on the Multi screens are not mandatory and do not perform any calculations. Invoicing prefills with 0.00 amounts.

To hide the new fields on grids, see [Changing How a Grid Displays].

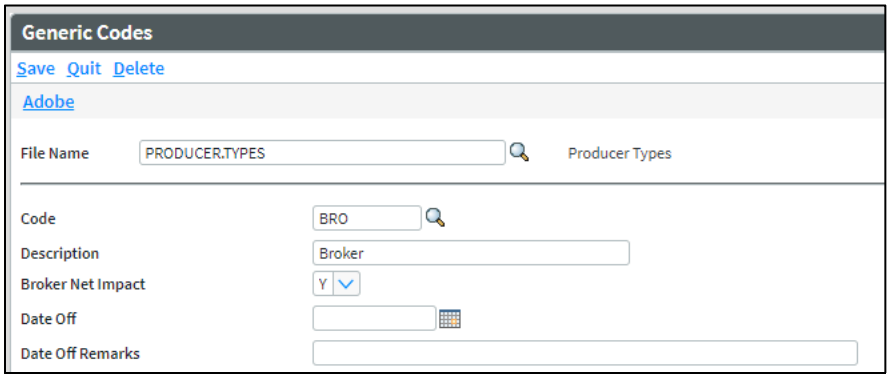
The grids affected:

- CP_100_ACCT_LIS_2 – Client Multi
- PI_101_ACCT_LIS_2 – Policy Multi
- CP_150_TAB_MULTI_LIS_2 – Invoice Multi
- CP_150_TAB_INSTALL_LIS_1 – Installments Grid
- CP_150_TAB_INSTALL_LIS_2 – Add Installments Grid
- CP_150_TAB_CBILLED – Company Bill Invoice Grid
- CP_150_TAB_INVOICE_LIS_1 – Invoice Tab Grid
- PI_112_LIS_1 – Policy Invoice

Create Producer Types in Generic Codes

The Producer Type determines the percentage split on the Client Multi or Policy Multi and whether the staff is an outside broker or internal.

- Enter PRODUCER.TYPES in Generic Codes
- Add the mandatory fields:
  - Code – maximum five characters
  - Description – Type description that prefills to the Production Report
  - Broker Net Impact
    - Yes = Outside Broker. Answering Yes performs a different calculation illustrated in the Invoicing Production Credit section.
    - No = Internal Staff



Assign a Producer Type in Staff Codes

Assign a Producer Type to a user in Staff Codes. Producer Type is located under the Security & Roles section. Producer Type indicates how percentages are split on the Client Multi and Policy Multi pages.

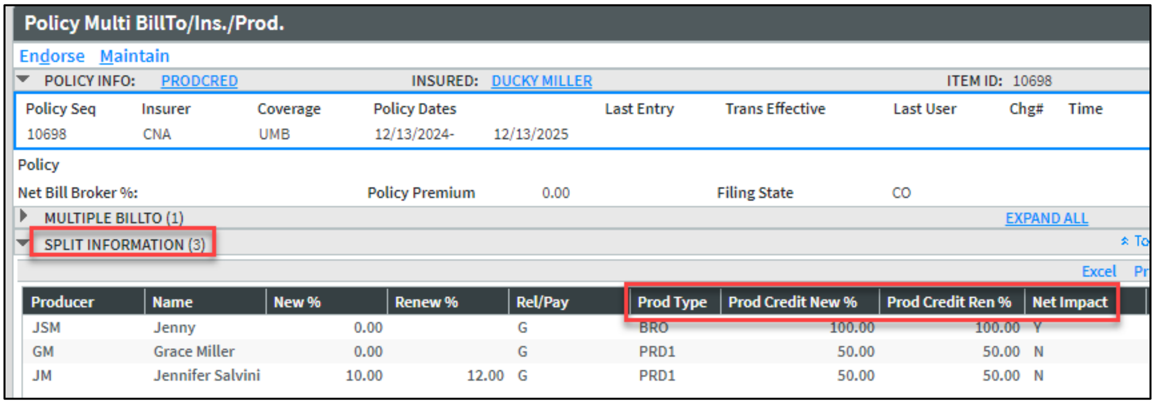
PRODUCTION CREDIT FIELDS ON CLIENT MULTI AND POLICY MULTI - ENABLE PRODUCTION CREDITS IS YES

The Multiple Producer section on Client Multi and Policy Multi is renamed to **Split Information.** New fields that are mandatory when ***Enable Production Credits?*** = **Yes.**

- Prod Type (prefills from personalization but is editable)
- Prod Credit New%
- Prod Credit Ren%
- Net Impact (not editable, prefills from Producer Type)

An error displays if the fields are left blank upon the Save of the page: **(6030) Production Credit fields are mandatory.**

If ***Enable Production Credits?*** = **No**, entering Producer Type and Production Credit % amounts display an error on save, **(6027) Production Credit is not enabled and cannot be used.**


Policy Multi BillTo/Ins./Prod.

Endorse Maintain

POLICY INFO: PRODCRED INSURED: DUCKY MILLER ITEM ID: 10698

Policy Seq	Insurer	Coverage	Policy Dates		Last Entry	Trans Effective	Last User	Chg#	Time
10698	CNA	UMB	12/13/2024-	12/13/2025					

Policy

Net Bill Broker %: Policy Premium 0.00 Filing State CO

MULTIPLE BILLTO (1) EXPAND ALL

SPLIT INFORMATION (3)

Excel Pr

Producer	Name	New %	Renew %	Rel/Pay	Prod Type	Prod Credit New %	Prod Credit Ren %	Net Impact
JSM	Jenny	0.00		G	BRO	100.00	100.00	Y
GM	Grace Miller	0.00		G	PRD1	50.00	50.00	N
JM	Jennifer Salvini	10.00	12.00	G	PRD1	50.00	50.00	N

When you add Client Multi or Policy Multi details to a Client or Policy for the first time, Production Credit percentages prefill depending on the number of producers listed by Producer Type.

For example, there are three producers on the Policy Details page. One producer has a producer type of BRO with Broker Net Impact set to Yes, and the other two producers have a producer type of PRD1 with Broker Net Impact set to No. The single producer with Net Impact set to Yes prefills with 100%, and the two with the same producer type split the percentages 50/50. If three producers were the same Producer Type, the percentages would be 33.34/33.33/33.33.

The % per Producer Type is validated to equal 100% or 0%. If the total percentages by producer type are not 100 or 0, an error will occur upon save of the page: **(6028) Sum of Prod Credit New% does not total 0.00 or 100.00.**

Production Credit fields are carried over on Renewals, Remarkets and Rewrites when *Automatically Copy Policy Multi Information on Renewal, Rewrite or Remarket?* and *Copy Policy Multi Information on Automatic Renewals in Download?* are set to **Yes**. Refer to Help for Accounting Flags for additional information on these flags.

INVOICING PRODUCTION CREDITS

Once your Multi screen is set up with Production Credit percentages, you can begin to invoice. Production Credits only flow from the Multi screen. Invoicing uses Policy Multi first and Client Multi if Policy Multi does not exist. If Policy Multi or Client Multi is not set up, Production Credit is not calculated.

There are two types of calculations.

1. When Net Impact on a ProdType is **Yes**, Prod Credit Amt will prefill on the producer line using the formula: *Agency Amt * Prod Credit %*
2. When Net Impact on a Prod Type = **No**, Prod Credit Amt will prefill on the producer line using the formula: *(Total Agency Amt - Total Broker Amount) = (Net) * Prod Credit %*

In the example below, the first line of Split Information is an outside broker with Net Impact set to Yes. A new business invoice is created for $1,000 Transaction Amount and $102.50 Agency Amount. The producer commission is calculated according to the New%.

For an invoice where there is a producer with Net Impact = Y, each Production Credit Amount is calculated:

Producer JM = $102.50 x 0% = $0.00

Producer CEC = $102.50 – 10.25 (JM's producer commission) = $92.25 x 50% = $46.13

Producer GM = $102.50 – 10.25 (JM's producer commission) = $92.25 x 50% = $46.13

Policy Multi

Policy Multi BillTo/Ins./Prod.

Save Quit Delete Redisplay

POLICY INFO: RELEASENOTES INSURED: SALVINI SURF COMPANY

Policy Seq	Insurer	Coverage	Policy Dates		Last Entry	Trans Effective
11820	CNA	PKG	03/01/2024-	03/01/2025		

Policy

Net Bill Broker %: Policy Premium 0.00 Filing State

MULTIPLE BILLTO (1)

SPLIT INFORMATION (3)

Producer	Name	New %	Renew %	Rel/Pay	Prod Type	Prod Credit New %	Prod Credit Re...	Net Impact
JM	Jennifer Salvini	10.00	8.00	G	BRO	0.00	0.00	Y
CEC	Carol Capwell	6.00	5.00	G	PRD1	50.00	50.00	N
GM	Grace Miller	3.00	2.00	G	PRD1	50.00	50.00	N

Policy Invoice

InvoiceNum	Trans Am...	Agency%	Agency A...	Prod	Prod%	Prod Amt	Dept	Cov	Serv	CO...	Prod Ty...	Prod Cr...	Prod Cr...	Net Im...
1100008131	1,000.00	10.25	102.50	JM	10.00	10.25	00	PKG	SMC		BRO	0.00	0.00	Y
1100008131	0.00	0.00	0.00	CEC	6.00	6.15	00	PKG	SMC		PRD1	50.00	46.13	N
1100008131	0.00	0.00	0.00	GM	3.00	3.08	00	PKG	SMC		PRD1	50.00	46.13	N

In the example below, all producers have a Net Impact = N. A new business invoice is created for $5,000 Transaction Amount and $750 Agency Amount. The producer commission is calculated according to the New%.

Each Production Credit line is calculated:

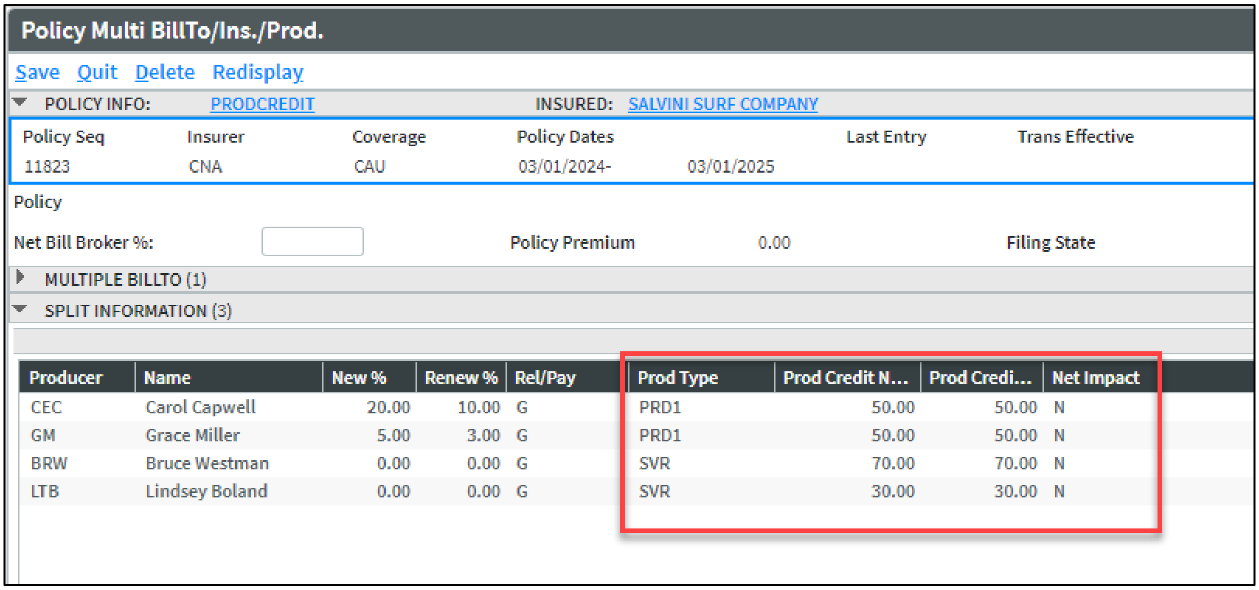
Producer CEC = $750 x 50% = $375

Producer GM = $750 x 50% = $375

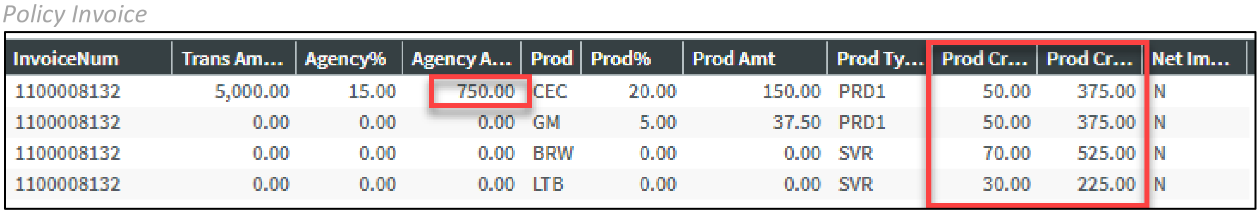
Producer BRW = $750 x 70% = $525

Producer LTB = $750 x 30% = $225

Policy Multi



Policy Invoice



If ***Enable Production Credits?*** = **No**, you can enter a Producer Type and Production Credit percentages on the Invoicing tab, but calculations will not occur.

STAFF CODE GLOBAL CHANGE

Staff Code Global Change of a producer updates the Producer Type field on Client Multi and Policy Multi but does not update Production Credit percentages.

A toast message displays after the Final Report if producers with Production Credits are changed, *Client Multi & Policy Multi Production Credit% must be changed manually.*

PROGRAMS THAT USE PRODUCTION CREDIT

When Production Credits are personalized on Client Multi or Policy Multi, these programs are affected:

- Agency Bill and Direct Bill Invoicing
- Installments
- Direct Bill Invoicing
- Automatic Invoicing
- One Step Direct Bill Receipts and Disbursements
- Direct Bill Commission Statement Download
- SOAP Web Methods
    - invoiceInsert
    - invoiceVoid

  - invoiceDelete
  - commissionStatementInsert
  - Policy Multi

After 24R1 is loaded, all invoices on the Policy Invoice page will display 0.00 for Production Credit Percentage and Amounts.

REPORTING

The Production Credit fields are reflected on an exported Production Report**.**

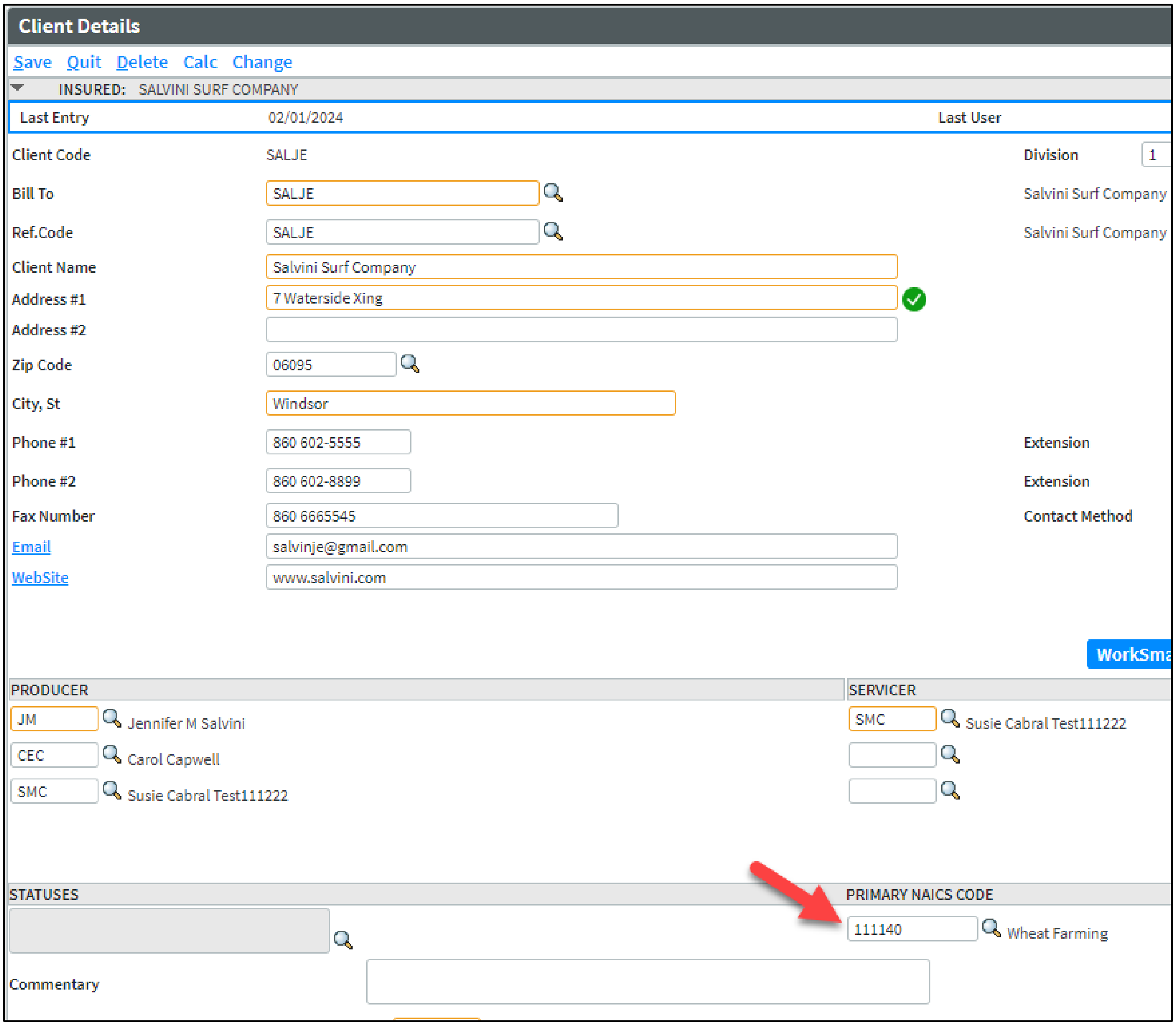
AL	AM	AN	AO	AP
ProdType	ProdTypeName	ProdCreditPct	ProdCreditAmt	NetImpact
PRD1	Producer1	40.00	104.76	N
BRO	Broker	0.00	0.00	Y
BRO	Broker	0.00	0.00	Y
BRO	Broker	0.00	0.00	Y
PRD1	Producer1	60.00	-157.14	N
PRD1	Producer1	40.00	-104.76	N
BRO	Broker	0.00	0.00	Y
BRO	Broker	0.00	0.00	Y
BRO	Broker	0.00	0.00	Y
PRD1	Producer1	60.00	157.14	N
BRO	Broker	0.00	0.00	Y

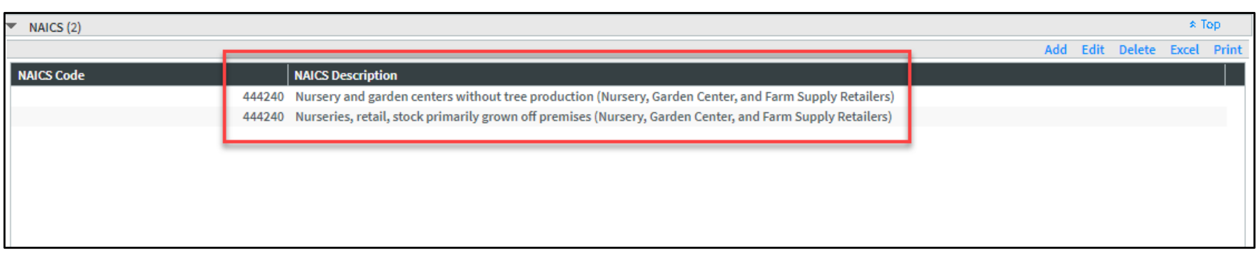
Dictionaries for Report Builder and SQL are listed in the Report Builder and SQL Dictionaries Added section of Release Notes.

Watch the demo on Production Credit

NAICS Codes on Client Details

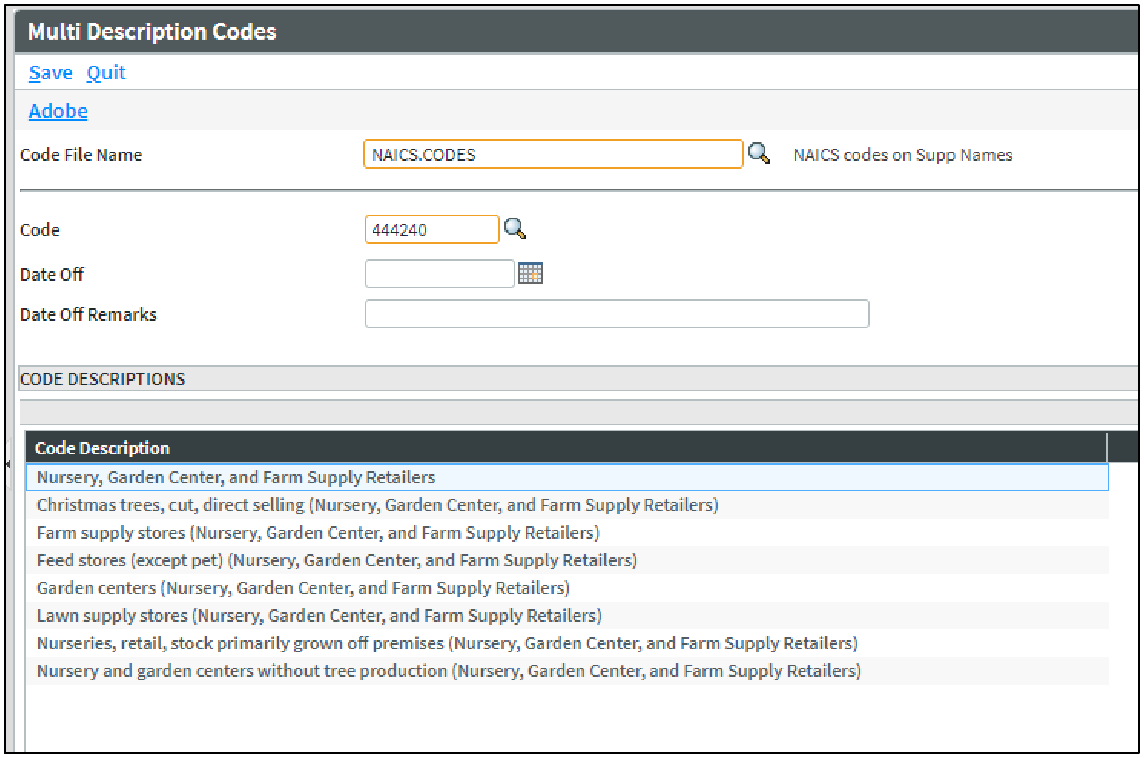
The Client Details page has a new field for Primary NAICS Code and a Line Item Set for multiple NAICS Codes. These new fields allow focus on targeted marketing efforts on clients in similar or identical industries.





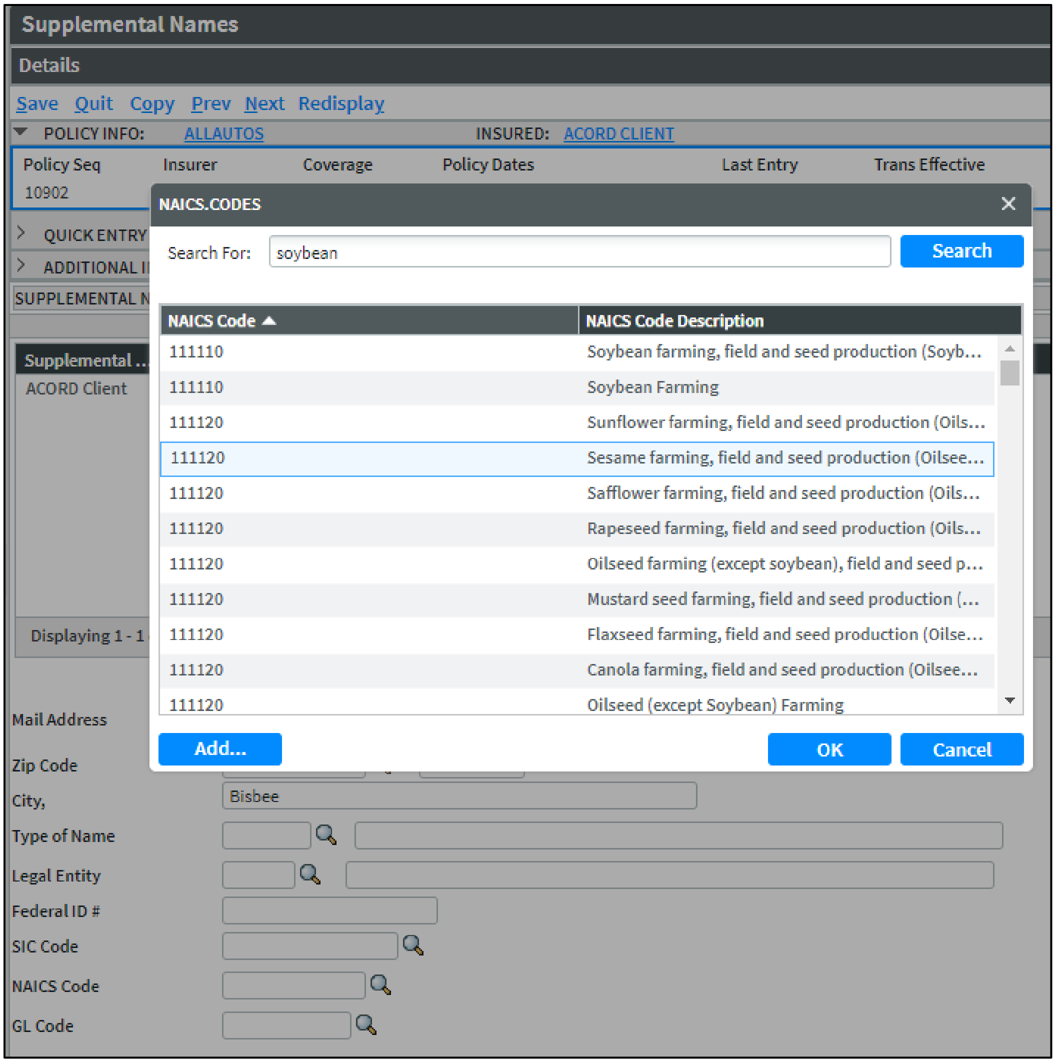
NAICS.CODES in Multi Description Codes

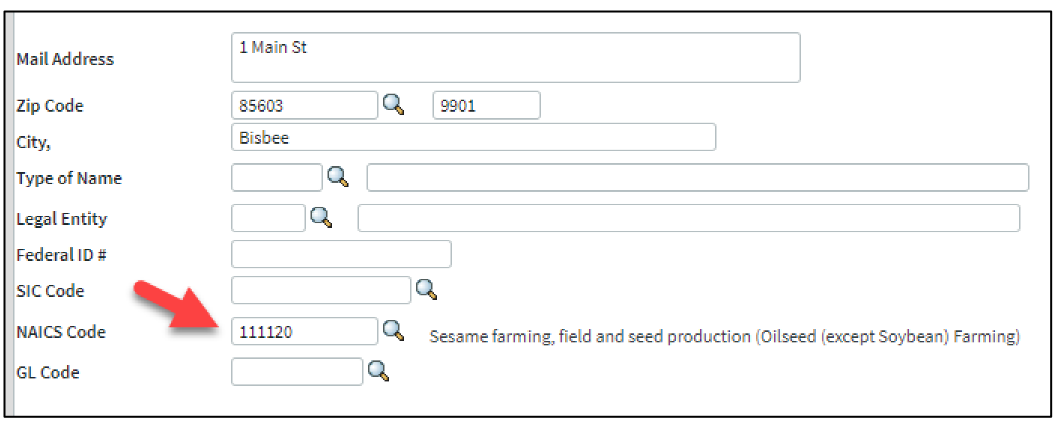
The NAICS.CODES are stored in Multi Description Codes. Multi Description Codes allow one code to be used for multiple NAICS Descriptions. Descriptions are stored with the main description on the first line and subsequent lines display the sub-categories (main description). NAICS.CODES has been updated from the latest list of codes found on https://www.census.gov/naics/.



NAICS Codes on Supplemental Names

The NAICS Codes field on Supplemental Names has also been updated to use the Multi Description Codes, NAICS.CODES file.





- An NAICS Code added or deleted on a Supplemental Name updates the NAICS Code Line Item Set on Client Details. The primary NAICS Code field on Client Details is not affected.
- An NAICS Code added or deleted on Client Details does **NOT** update the Supplemental Name page.
- Supplemental Names Import now uses the new codes and descriptions.

- When 24R1 is loaded, NAICS Codes on active supplemental names update the NAICS Codes Line Item Set on Client Details for active policies. The description of the NAICS Code is the first line of the code without a subcategory.

Web Services

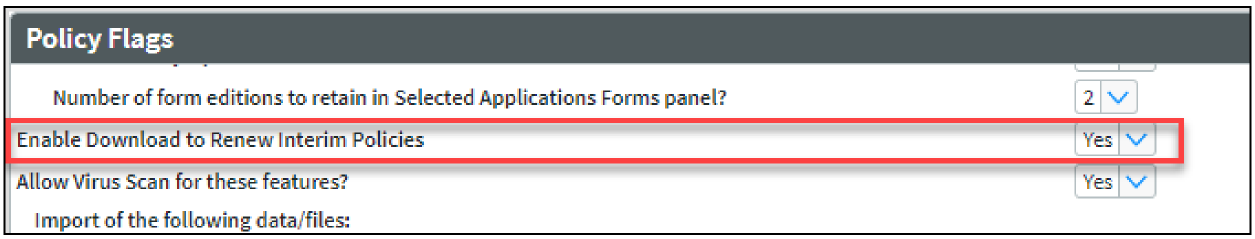
The Web Services SOAP methods for Client Insert and Client Update now support the NAICS Code fields.

Renew Remarketed Policies in Company Download

Remarketed Policies can now be renewed through Company Download without having to change the remarket status. Previously a user received the error, *This policy is Remarketed. You must activate the policy first and then process this Renewal transaction.*

ENABLE DOWNLOAD TO RENEW INTERIM POLICIES IN POLICY FLAGS

A new flag has been added to the Policy Flags page called *Renew Interim Policies*.



- Yes – allows a renewal in Company Download to renew a remarketed policy
- No – does not allow a renewal of a remarketed policy.

If you have Custom Release 598075 that allows the user to match a renewal download transaction to a policy that has been remarketed, answering Yes to the new Enable Download prompt, overrides this custom software. To maintain the custom feature, the Enable Download flag must be blank or No.

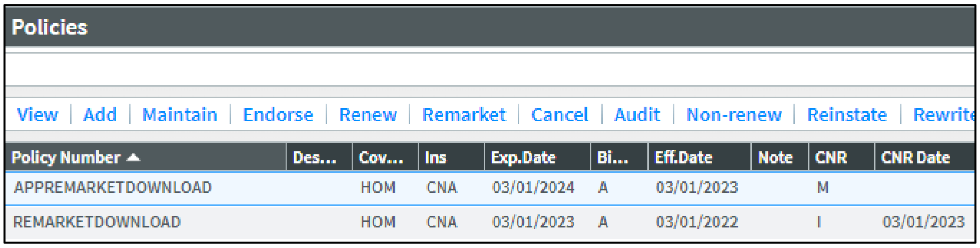
REMARKET DOWNLOAD WORKFLOW

When the downloaded renewal is applied to an interim policy,

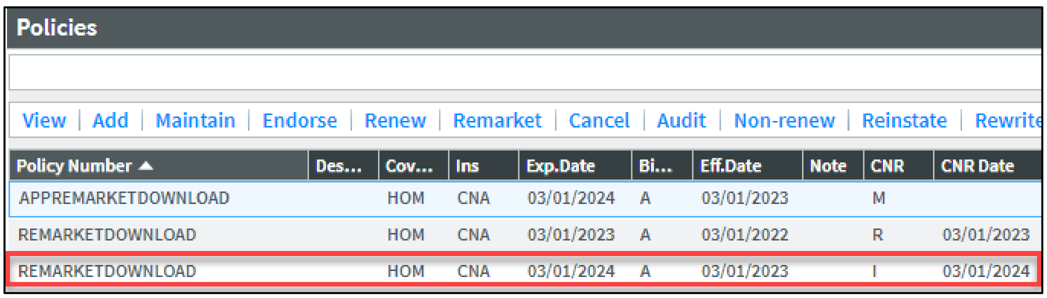
- The Interim policy (Original Term) CNR flag changes to **R**.
- The new term created through download is now the policy with CNR = **I**. The CNR date is also updated.
- All linkage for Prior and Next Term are updated.

Example of a workflow when Enable Download to Renew Interim Policies is Yes

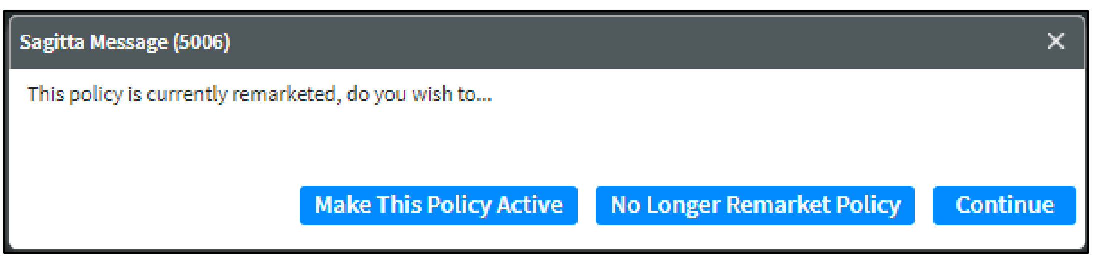
1. The REMARKETDOWNLOAD policy is remarketed to APPREMARKETDOWNLOAD.



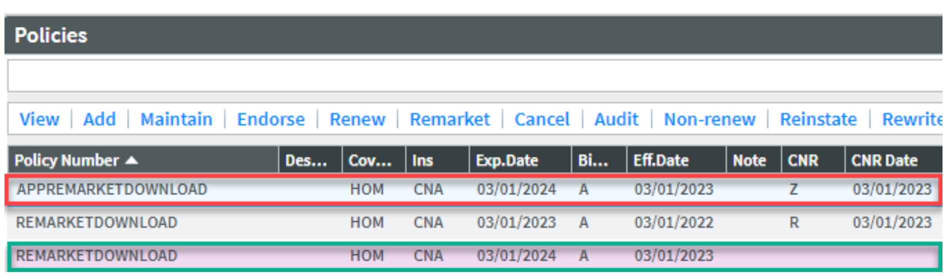
2. The carrier sends the renewal transaction through Company Download. The download is updated and,
   a. changes the original term to **(R)enewal**
   b. creates a new **(I)nterim** policy



3. Maintaining the remarketed policy continues to provide the options.

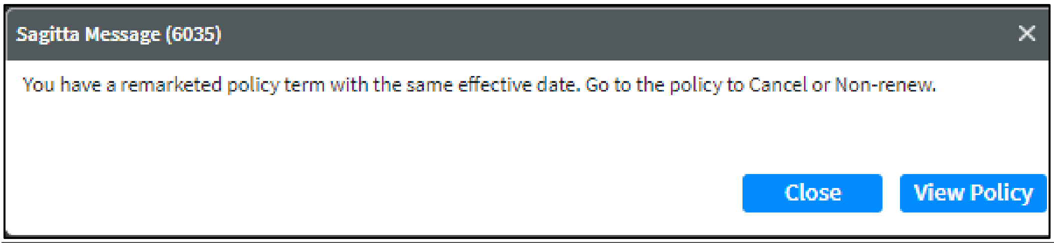


4. Selecting *No Longer Remarket Policy,*
   a. deactivates the Remarketed term with CNR = Z CNR status.
   b. activates the Interim CNR status policy term, by removing the CNR Status and CNR Date.



5. Selecting *Make This Policy Active,*
   a. activates the Remarketed term
   b. removes the Interim CNR status from the prior term policy.

6. The policy is Saved and a new prompt displays.
    a. Close – finishes the process
    b. View Policy – launches the user to the Policy Details page of the Interim Policy. The user can Cancel or Non-Renew the policy term with the same effective date.

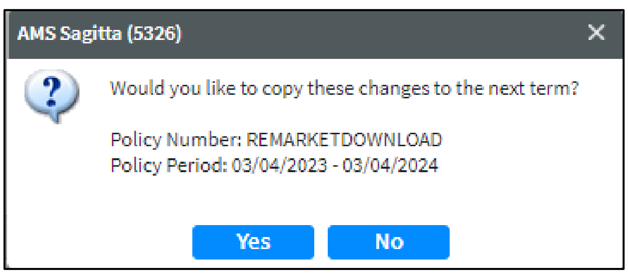


Watch the demo on Renew Remarketed Policies in Company Download

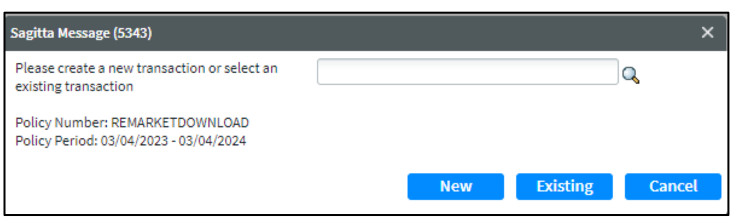
COPY TO NEXT POLICY TERMS

Copy Changes to Next Term now prompts the user to copy to all next terms of a policy.

If you have an original policy term, and it has been Remarketed, but the Renewal for the original term comes in through Company Download, there are three terms of the policy. If your agency has Copy Changes to Next Term? set to Yes, you can make a change in the original term of the policy, and it will prompt to copy the change first to the renewal term, and then to the remarketed term. The prompt to copy changes displays.



Select **Yes** to display the Prompt to create a new transaction or select an existing transaction.



Once the transaction is selected, the prompt displays for the next policy term, and this process repeats for following term until the Current term is reached.

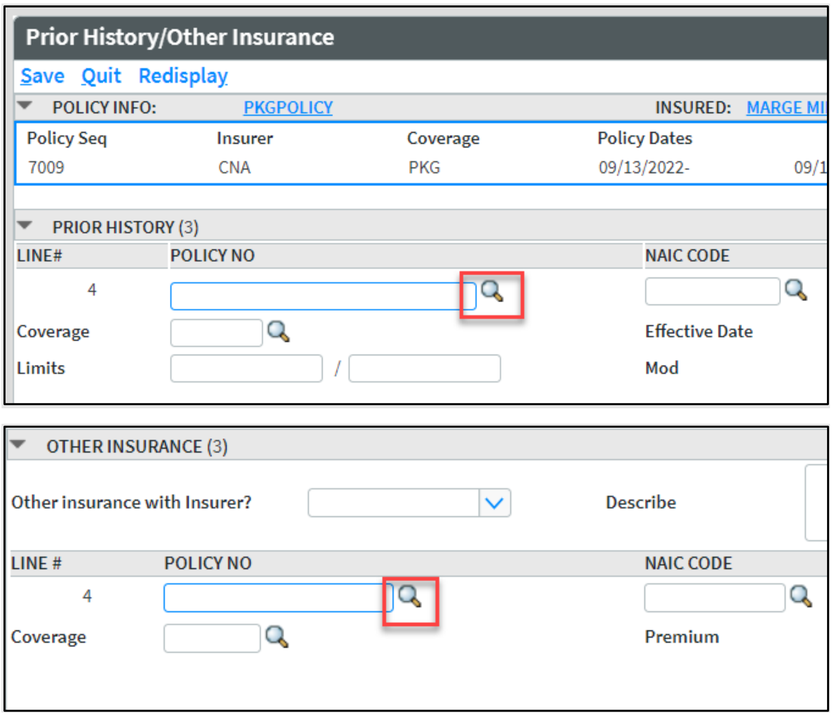
If a Policy term is locked when the Copy to Next function is being processed the user receives an error, the changes are not copied. The policy term is skipped and the Copy to Next function continues to the following term.

For more information on Copy Changes to Next Term, see Copy Policy Changes to Next Term Overview in Sagitta Help.

Watch the demo on Copy to Next Term

Prior History/Other Insurance Policy Number

The Prior History/Other Insurance page, Policy No. field now has search available. Use the search to find a policy on your client or type an existing policy number into the field. A policy that does not exist in Sagitta continues to be allowed in the field without field prefill.



The Save&Copy button has been removed to prevent data integrity issues that could occur when adding an existing policy or a policy that does not exist.

Watch the demo on Prior History Policy Number

Company Download Supports MHOME

The line of business MHOME is now supported for importing Mobile Home updates for Company Download. Previously, Mobile Home policies processed in the company mailbox as Homeowners (HOME) transactions. To process Company Download transactions with the MHOME line of business, MHOME and appropriate personalization must be added to Company DL Certified LOBs, Company Mailbox , and Insurer/Coverage Personalization. For more information, reference MyVertafore articles: Company Download Certified LOBs DOC ID 23581, Company Mailbox Personalization DOC ID 23584, and Insurer/Coverage Personalization DOC ID 23589.

Watch the demo on MHOME in Company Download

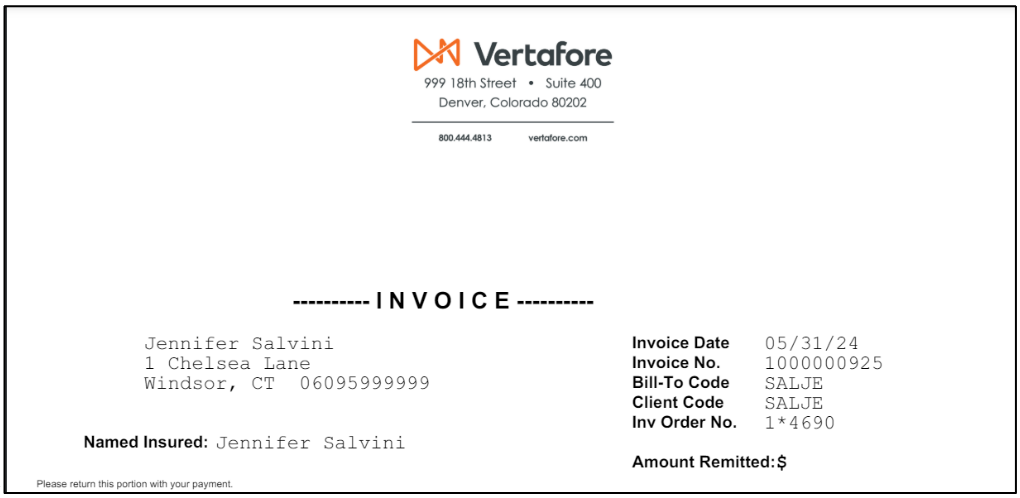
Cash Receipt Web Services Enhancements

The Cash Receipt Web Services now allows a zero-check amount for a Client Cash Receipt and a negative check amount for a Non-Client Cash Receipt.

Logo Area on Invoices and Statements Increased

The area for Logos to fill on Invoices and Statements has been enlarged to cover the entire top section of the invoice or statement. Add white space around the logo image to adjust the size of the logo on the top of an invoice or a statement.

Logo before the upgrade:



Vertafore
999 18th Street • Suite 400
Denver, Colorado 80202
800.444.4813 vertafore.com

---------- I N V O I C E ----------

Jennifer Salvini
1 Chelsea Lane
Windsor, CT 06095999999

Invoice Date	05/31/24
Invoice No.	1000000925
Bill-To Code	SALJE
Client Code	SALJE
Inv Order No.	1*4690

Named Insured: Jennifer Salvini

Amount Remitted:$

Please return this portion with your payment.

Logo with 24R1 Release:

Vertafore
999 18th Street • Suite 400
Denver, Colorado 80202

800.444.4813 vertafore.com

---------- I N V O I C E ----------

Margie Miller
123 Test Drive
AVONDALE ESTATES, GA 30002

Invoice Date	05/31/24
Invoice No.	1000031422
Bill-To Code	MGM
Client Code	MGM
Inv Order No.	1*228838

Named Insured: Margie Miller

Amount Remitted: $

Please return this portion with your payment.

Amounts are in US Dollars

Watch the demo on adjusting the size of the logo for invoices or statements.

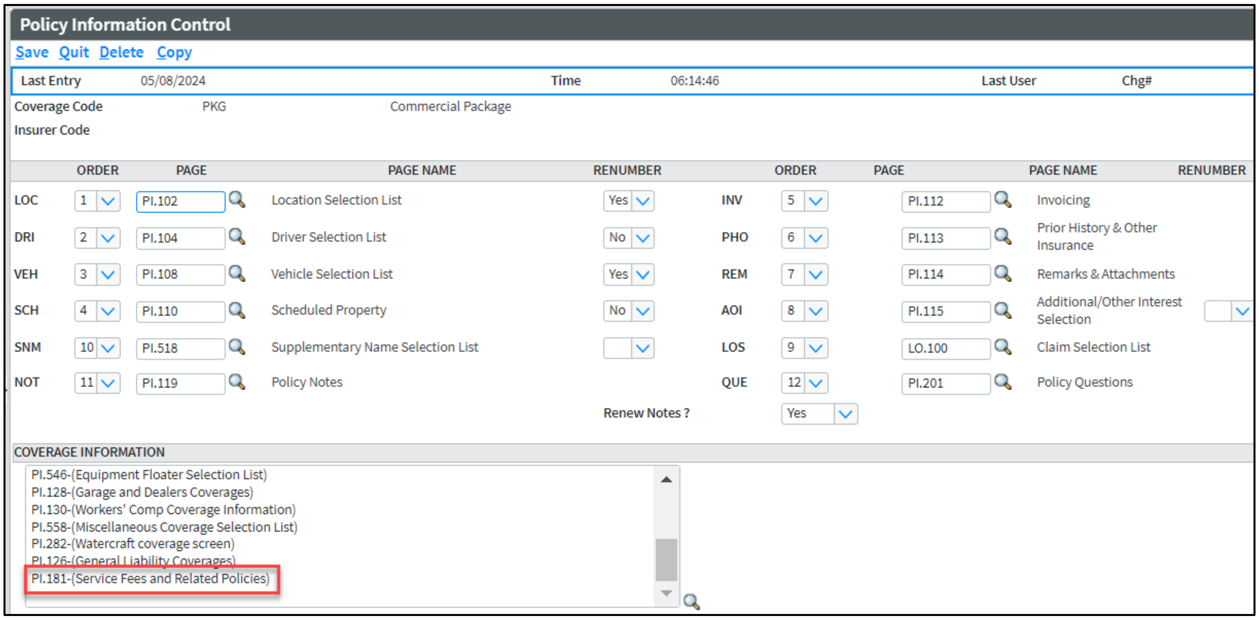
Service Fees and Related Policies Page

Service Fees and Related Policies is a new page to associate policies that are connected and/or dependent for a client. This includes Fee, Layer/Tower, and/or Subscription/Quota Share policies.

PERSONALIZATION

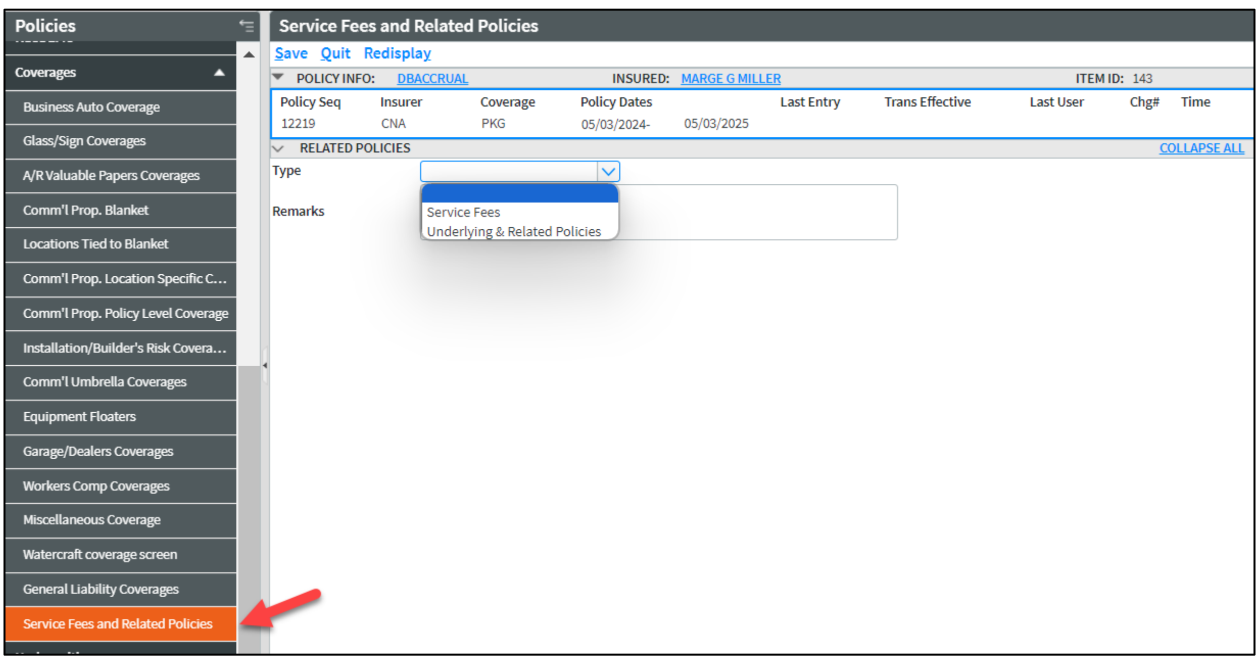
Add the *Service Fees and Related Policies* page to applicable coverages in **Policy Information Control**.

- Go to Other > Personalization > System > Policy Information Control
- Enter Coverage Code that you want the new page to appear on (e.g., PKG)
- Enter the Insurer Code (if appliable)
- Click Load
- Enter PI.181 to Coverage Information
- Click Save

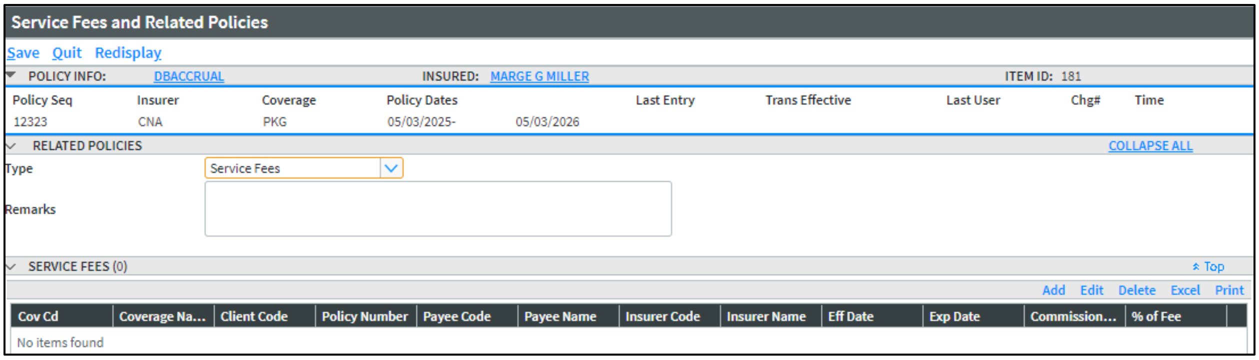


SERVICE FEES AND RELATED POLICIES PAGE

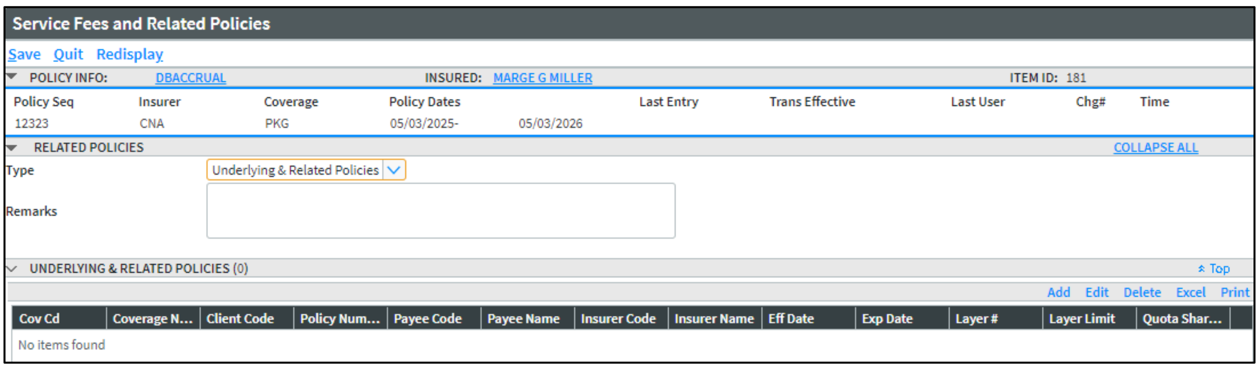
Access the page on the Policy secondary navigation under Coverages. Select a *Type* in the drop-down to display the grid for *Service Fees* or *Underlying & Related Policies*. You can only select one type on the page.



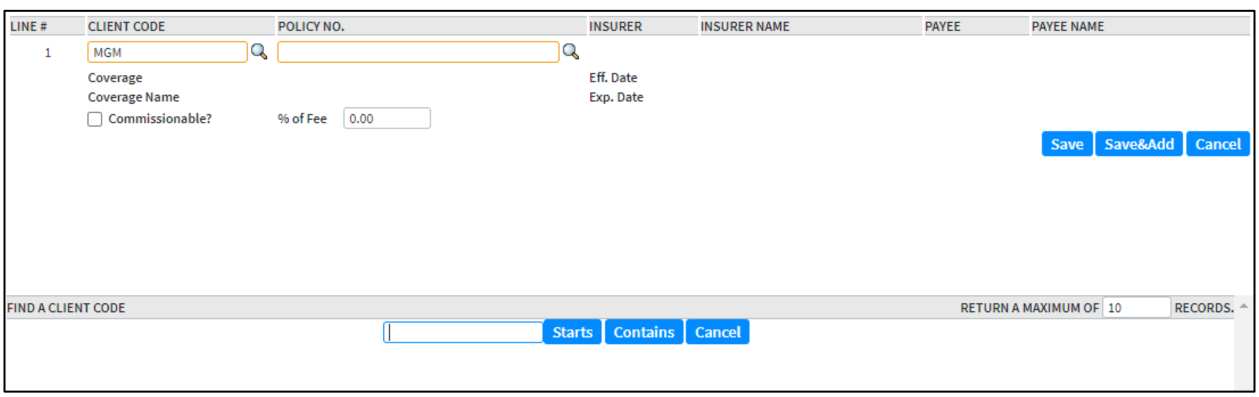
Select *Service Fees* to display the Service Fees grid. The fields displayed are Coverage Code, Coverage Name, Client Code, Policy Number, Payee Code, Payee Name, Insurer Code, Insurer Name, Effective Date, Expiration Date, Commissionable?, and % of Fee.



Select *Underlying & Related Policies* to display the Underlying & Related Policies grid. The fields displayed are Coverage Code, Coverage Name, Client Code, Policy Number, Payee Code, Payee Name, Insurer Code, Insurer Name, Effective Date, Expiration Date, Layer #, Layer Limit, and Quota Share %.



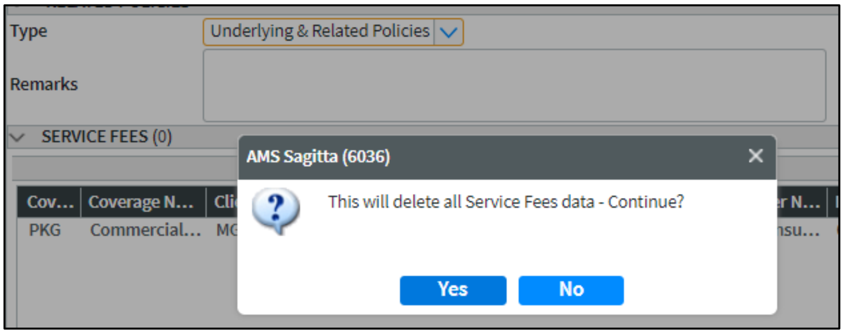
Click *Add* on either grid to add a policy. The Client Code prefills with current client and the Policy Lookup filters by the Client Code. The policy must exist on the Sagitta system. The Client Code Lookup allows for the selection of a different client.



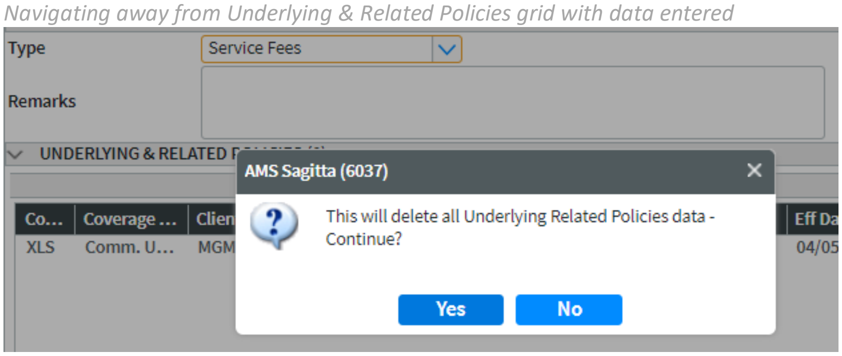
DATA IS REMOVED FROM INCORRECT TYPE

When the Type drop-down is changed, the prompts below display if data has already been entered in the grid.

Navigating away from Service Fees grid with data entered



Navigating away from Underlying & Related Policies grid with data entered



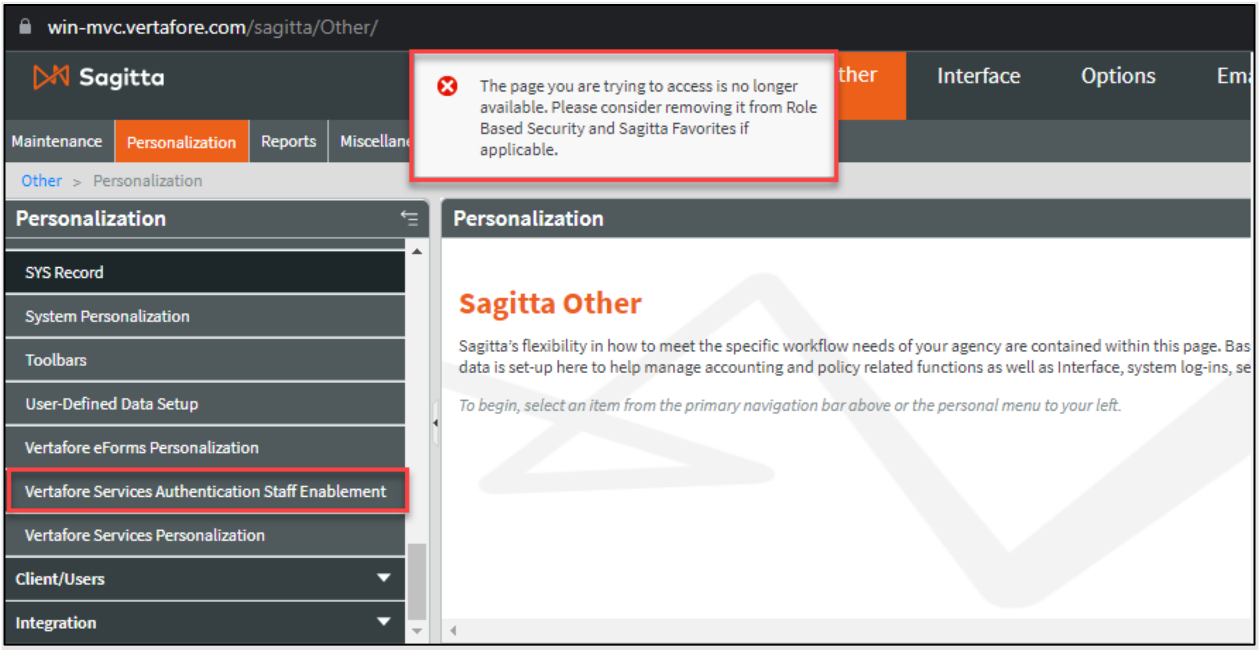
Information on this page does not carry forward to a policy that is renewed, remarketed or rewritten.

Watch the [demo] on Service Fees and Related Policies page.

Removal of Vertafore Services Staff Enablement

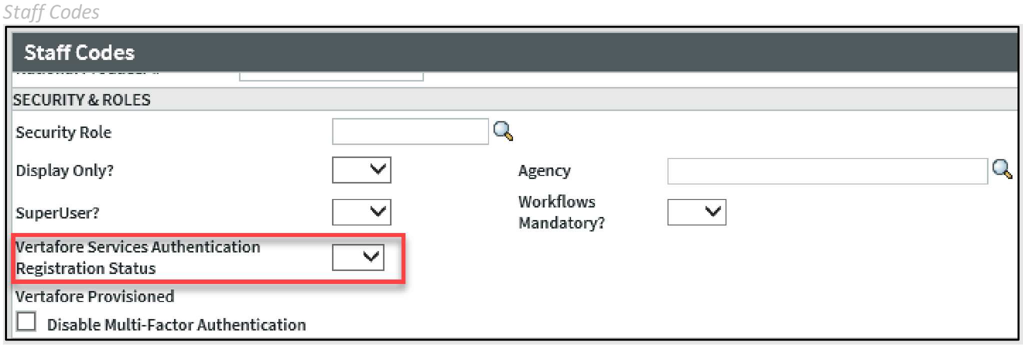
Access to the Vertafore Services Authentication Staff Enablement page has been removed as this authentication method is no longer valid.

If this page was added to any roles, please consider removing it as accessing it will present the following error message:

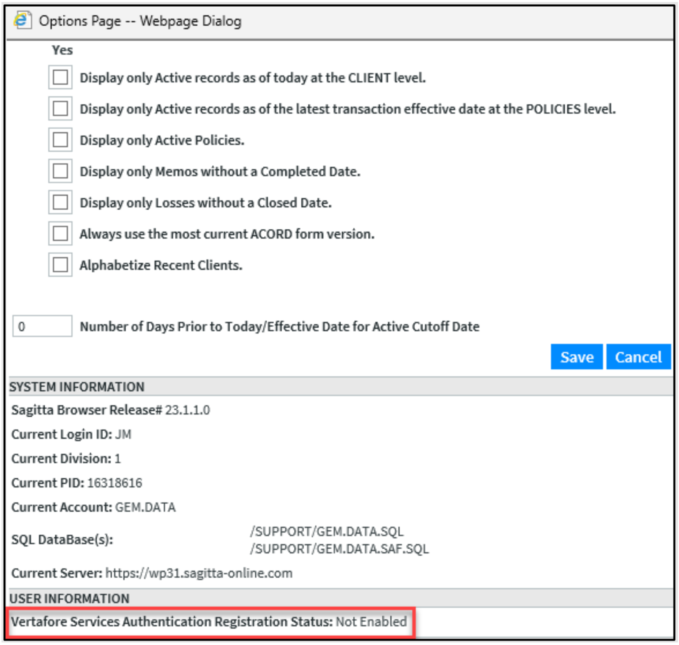


The supporting information for *Vertafore Services Authentication Registration Status* field is also removed from Staff Codes and Settings.

Staff Codes



Options



New Additions to the Vertafore Acord Library

ACORD FORM	State	Version	FORM NAME
50	CT	2022/07	Connecticut Insurance Identification Card
50	LA	2018/10	Louisiana Auto ID Card
50	ME	2022/01	Maine Motor Vehicle Insurance Identification Card
51	ME	2022/01	Temporary Maine Motor Vehicle Insurance Identification Card
50	TX	2020/01	Texas Liability Insurance Card

Report Builder and SQL Dictionaries Added

Sagitta File	Attribute Dicts	Synonym Dictionaries	ODBC SQL dictionaries
ADDITIONAL.INTERESTS	60	MAK	MAK
CLIENTS	23	MAK	MAK
CLIENTS	74	NAICS.CODES	NAICSCODES
CLIENTS	75.1	PRIMARY.NAICS.CODE	PRIMARYNAICSCODE
CLIENTS	75.2	PRIMARY.NAICS.DESCRIPTION	PRIMARYNAICSDESCRIPTION
CLIENTS	76	NAICS.DESCRIPTION	NAICSDESCRIPTION

Sagitta File	Attribute Dicts	Synonym Dictionaries	ODBC SQL dictionaries
PRODUCER.TYPES	0	CODE	PRODUCER_TYPES_CODE
PRODUCER.TYPES	3	DESCRIPTION	PRODUCER_TYPES_DESCRIPTION
PRODUCER.TYPES	8	BROKER.NET.IMPACT	PRODUCER_TYPES_BROKERIMPACT
STAFF	100	PRODUCERTYPE	PRODUCER.TYPE
CLIENTS.ACCT.PREFILL	43	PRODUCTION.CREDIT.NEW	PRODUCTION_CREDIT_NEWPERCEN
CLIENTS.ACCT.PREFILL	44	PRODUCTION.CREDIT.REN	PRODUCTION_CREDIT_RENPERCEN
CLIENTS.ACCT.PREFILL	45	BROKER.NET.IMPACT	BROKER_NET_IMPACT
CLIENTS.ACCT.PREFILL	46	PRODUCER.TYPE	PRODUCER_TYPE
POLICIES.ACCT.PREFILL	43	PRODUCER.CREDIT.NEW%	PRODUCTION_CREDIT_NEWPERCEN
POLICIES.ACCT.PREFILL	44	PRODUCER.CREDIT.REN%	PRODUCTION_CREDIT_RENPERCEN
POLICIES.ACCT.PREFILL	45	BROKER.NEW.IMPACT	BROKER_NET_IMPACT
POLICIES.ACCT.PREFILL	46	PRODUCER.TYPE	PRODUCER_TYPE
SALES	71	PRODUCER.TYPE	PRODUCER_TYPE
SALES	72	PROD.CREDIT%	PROD_CREDIT_PERCENT
SALES	73	PROD.CREDIT.AMOUNT	PROD_CREDIT_AMOUNT
SALES	74	NET.IMPACT	NET_IMPACT
PREMIUMS	41	PRODUCER.TYPE	PRODUCER_TYPE
PREMIUMS	42	PROD.CREDIT%	PROD_CREDIT_PERCENT
PREMIUMS	43	PROD.CREDIT.AMOUNT	PROD_CREDIT_AMOUNT
PREMIUMS	44	NET.IMPACT	NET_IMPACT
PRIOR.HISTORY	28	OTHER.INS.POL.SEQ	PRIORPOLSEQ
PRIOR.HISTORY	29	PRIOR.POLICY.SEQ	OTHERINSPOLSEQ
SERVICE.FEES	2	TYPE	TYPE
SERVICE.FEES	3	REMARKS	REMARKS
SERVICE.FEES	6	SF.POLICYNO	SERVICEFEEPOLICYNO
SERVICE.FEES	7	SF.INSURORCODE	SERVICEFEEINSURORCODE
SERVICE.FEES	8	SF.INSURORNAME	SERVICEFEEINSURORNAME
SERVICE.FEES	9	SF.PAYEECODE	SERVICEFEEPAYEECODE
SERVICE.FEES	10	SF.PAYEENAME	SERVICEFEEPAYEENAME
SERVICE.FEES	11	SF.COVCD	SERVICEFEECOVERAGECODE
SERVICE.FEES	12	SF.COVNAME	SERVICEFEECOVERAGENAME
SERVICE.FEES	13	SF.EFF.DATE	SERVICEFEEEFFDATE
SERVICE.FEES	14	SF.EXP.DATE	SERVICEFEEEXPDATE
SERVICE.FEES	15	COMMISSIONABLE	SERVICEFEECOMMISSIONABLE

Sagitta File	Attribute Dicts	Synonym Dictionaries	ODBC SQL dictionaries
SERVICE.FEES	16	PCT.FEE	PERCENTOFFEE
SERVICE.FEES	17	SF.CLIENT.CODE	SERVICEFEECLIENTCD
SERVICE.FEES	21	URP.POLNUMBER	UNDERLYINGPOLICYNO
SERVICE.FEES	22	URP.INSURORCODE	UNDERLYINGINSURORCODE
SERVICE.FEES	23	URP.INSURORNAME	UNDERLYINGINSURORNAME
SERVICE.FEES	24	URP.PAYEECODE	UNDERLYINGPAYEECODE
SERVICE.FEES	25	URP.PAYEENAME	UNDERLYINGPAYEENAME
SERVICE.FEES	26	URP.COVCODE	UNDERLYINGCOVCODE
SERVICE.FEES	27	URP.COVNAME	UNDERLYINGCOVNAME
SERVICE.FEES	28	URP.EFF.DATE	UNDERLYINGEFFDATE
SERVICE.FEES	29	URP.EXP.DATE	UNDERLYINGEXPDATE
SERVICE.FEES	30	LAYER	LAYERNO
SERVICE.FEES	31	LAYER.LIMIT	LAYERLIMIT
SERVICE.FEES	32	QSHARE.PCT	QSHAREPERCENT
SERVICE.FEES	33	RP.CLIENT.CODE	UNDERLYINGCLIENTCD

Web Service Tags Added

Sagitta File	Web Service Tag
ADDITIONAL.INTERESTS	AddressValidation
CLIENTS	AddressValidation
CLIENTS	PrimaryNAICS
CLIENTS	NAICSInfo
STAFF	ProducerType
CLIENTS.ACCT.PREFILL	ProducerType
CLIENTS.ACCT.PREFILL	ProductionCdNewPct
CLIENTS.ACCT.PREFILL	ProductionCdRenewPct
CLIENTS.ACCT.PREFILL	BrokerNetImpact
POLICIES.ACCT.PREFILL	ProducerType
POLICIES.ACCT.PREFILL	ProducerCreditNewPct
POLICIES.ACCT.PREFILL	ProducerCreditRenewalPct
POLICIES.ACCT.PREFILL	NetImpact
SALES	ProducerType

SALES	ProdCreditPct
SALES	ProdCreditAmt
SALES	NetImpact
PREMIUMS	ProducerType
PREMIUMS	ProdCreditPct
PREMIUMS	ProdCreditAmt
PREMIUMS	NetImpact

Fixes

Area	Defect ID	Release Notes
Accounting	DS325	Adjustment UTMs will now display the period end date if a prior date is used in Accounts Receivable Adjustments. (DE10614)
Accounting	DS5873	The Combined Cash Receipts Report will no longer lock all records and cause system issues when run for a large date range. (DE35296)
Auto IDs	DS323	The Kentucky 50 Auto ID Card will now prefill the Agency Phone Number and the Carrier Address. (DE10632)
Auto IDs	DS437	The Indiana 50 Auto ID Card will now prefill the Agency Phone and Address correctly. (DE5088)
Auto IDs	DS1148	The Missouri Acord 50 Auto ID Card will now update the Carrier Address correctly. (DE14467)
Auto IDs	DS9665	The second Insured Address will now update all Auto IDs where the second Address line is supported. (DE6132)
Auto IDs	DS9666	The Florida 50 Auto ID will now update the Fleet Indicator when selected on the vehicle page. (DE12451)
Auto IDs	DS9667	The Nevada 52 Permanent Auto ID is now the default card generated for Nevada vehicles. (DE17715)
Auto IDs	DS9763	The California 51 Auto ID will now update the Insurance Company Street Address, City, State and Zip. (DE4661)
Download	DS404	Commercial Umbrella Underlying Coverages are now updated properly when downloading a Renewal transaction. (DE9604)
Download	DS9916	A Workers Compensation update in Company Download, will correctly update the percent or factor for *Experience Modification*, and for the coverages that update to the *Charge/Credit* grid in the Workers Comp Underwriting page. (DE44018)

Area	Defect ID	Release Notes
Forms	DS5792	Vertafore eForms will now go to the Vertafore Viewer in the order selected. Note the ACORD 125 and 127 will continue to be on the top of the order until all forms are converted to the newer process. (DE34864)
Integration	DS4811	A certificate issued from a policy that has a numeric policy number, will now show active in InsurLink. (DE29577)
Integration	DS10408	Coverages, Categories and Cancellation Reasons will now export to BenefitPoint upon making a change to the Description and clicking Save from Generic Codes Maintenance. (DE45075)
Integration	DS10548	SurePath (Tinubu) will no longer error when creating a policy that has agency defined mandatory fields. (DE46488)
Invoicing	DS349	An error will now display on invoicing using Policy Multi that has a dated-off Transaction Code and Payee. (DE10537)
Invoicing	DS7688	The Quick button retains additional lines added to a multi bill invoice. (DE38319)
Invoicing	DS7691	If there are two billtos on an invoice and the first invoice is Saved, clicking Quick on the second billto now generates the error, *The Quick command is not permitted.* Click Save to post the second invoice. (DE38322)
Invoicing	DS8277	Using the Quick button on an invoice to post multiple billto invoices will no longer drop the payee code from the SALES record. (DE10613)
Invoicing	DS9932	The web method for InvoiceInsert on a multiple-payee invoice will no longer calculate the total of Producer Amounts greater than the total of Agency Amounts. (DE44016)
Invoicing	DS10048	Manual changes made to the Invoice Comments field on the Installment tab will now work properly and display on the printed Invoice. (DE44176)
Policy	DS5780	A policy created with a department that does not belong to the division displays the error, *Department (nn) is not valid for this Division.* (DE25690)
Policy	DS7597	If **Allow change of Policy Division?** is set to No on a Staff Security record, the user will not be able to change the division on the Invoice Data tab. (DE39611)
Policy	DS10508	The Estimated Annual Premium in the Policy Summary section of Policy Details page no longer pinks out when numbers are entered and the Calc button clicked. (DE46173)

Area	Defect ID	Release Notes
Policy	DS10542	In the Policy Summary section of the Policy Details page, when the amount in Estimated Annual Premium is 1,000,000.00 or greater, and an amount is entered in the Calc field, the new amount is added to the Estimated Annual Premium amount when the Calc button is clicked. (DE46189)
Policy	DS10856	In Chrome and Edge, the Drivers and Vehicles page no longer stops responding after exporting drivers or vehicles to Excel. (DE48666)

Questions

If you encounter problems or have questions concerning this release, Vertafore offers the following helpful resources:

- Search the Knowledge Base on My Vertafore.
- Create a Case at My Vertafore.

Watch all demos for 24R1