



FSC Manager

» **Single Letters**

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Introduction

Single letters are form letters created with Microsoft Word that will allow the user to merge data from FSC Manager into a pre-set Microsoft Word document. This letter will print for one individual. The pre-set letters created should be standardized letters that do not require modification each time they are printed. Single Letters can not be emailed.

This chapter will provide information on setting up and using Single Letters, envelopes and labels.

Single Letters

How to Print a Single Letter

1. Click on the Client Letters (Single Letters) button  on the Client screen.
2. Highlight the letter and click *Print*.

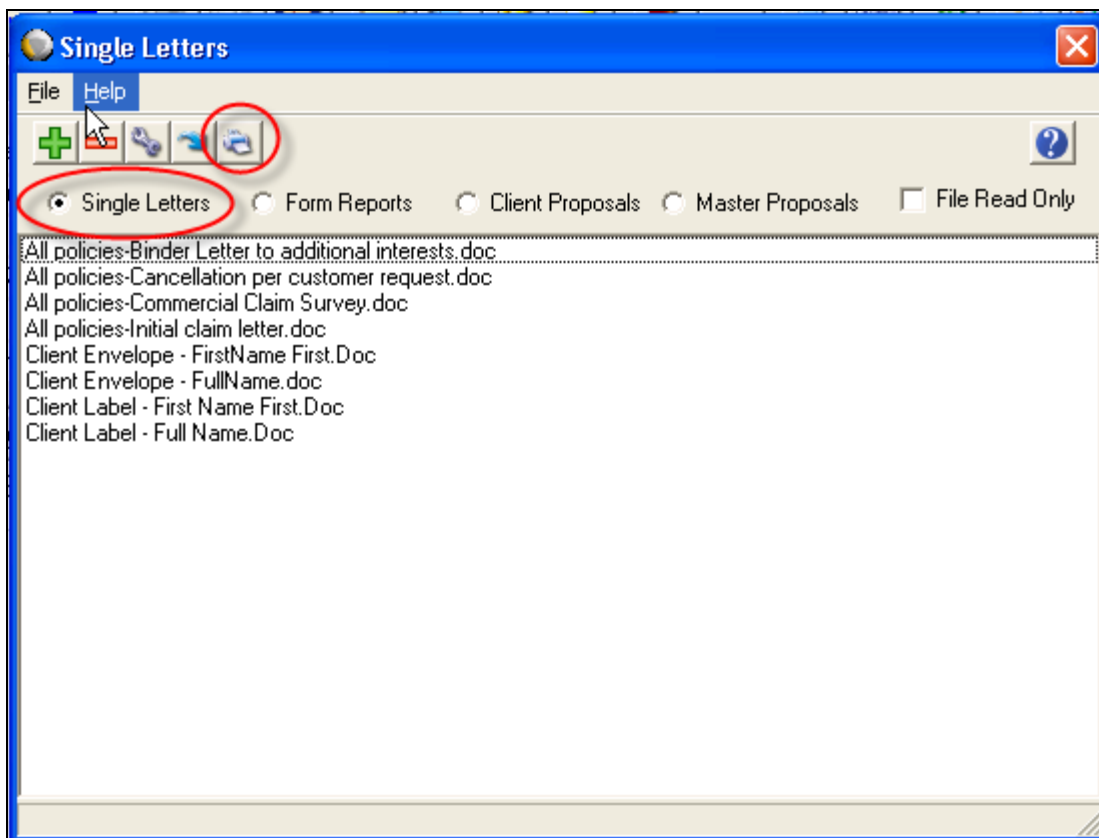
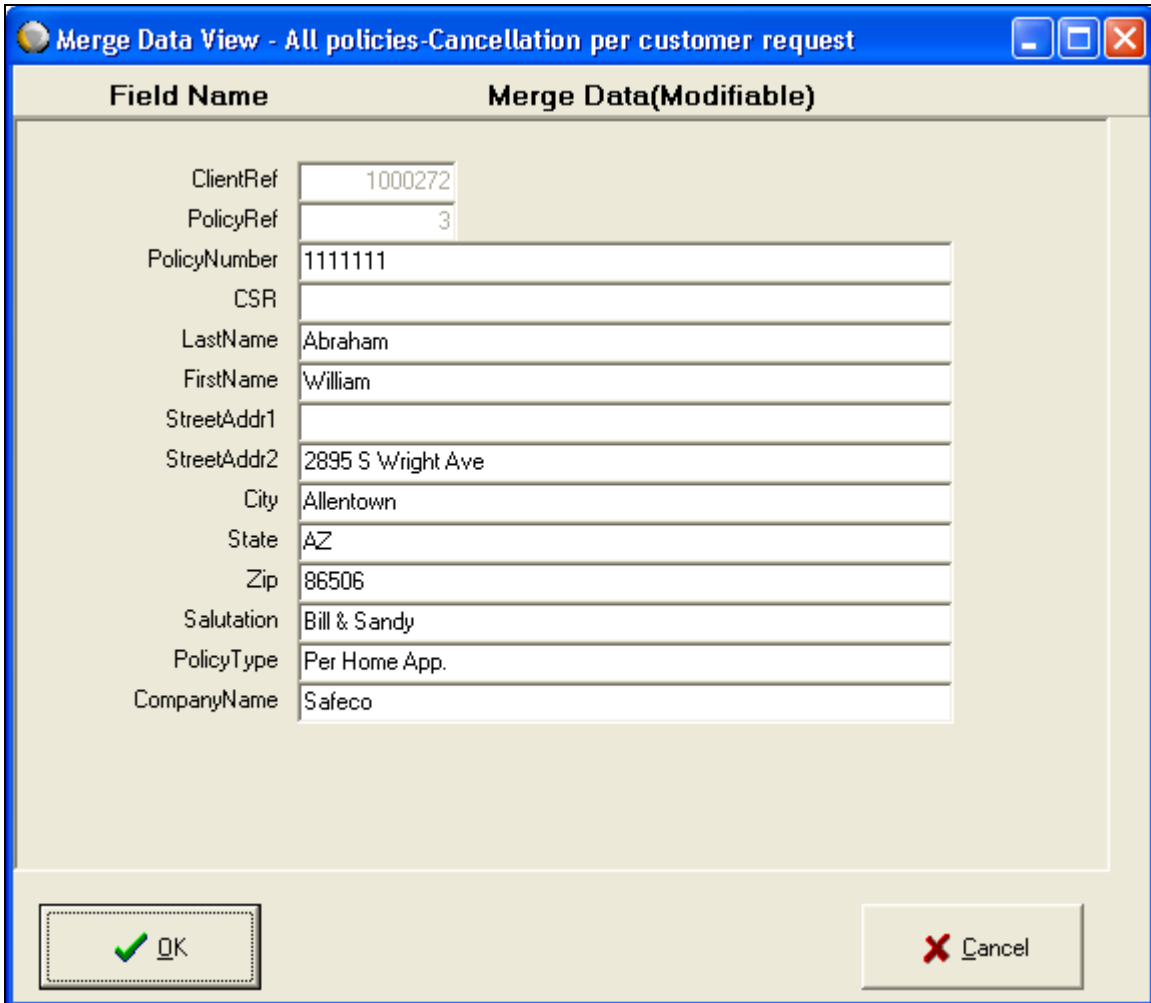


Figure 1: Single Letters Screen

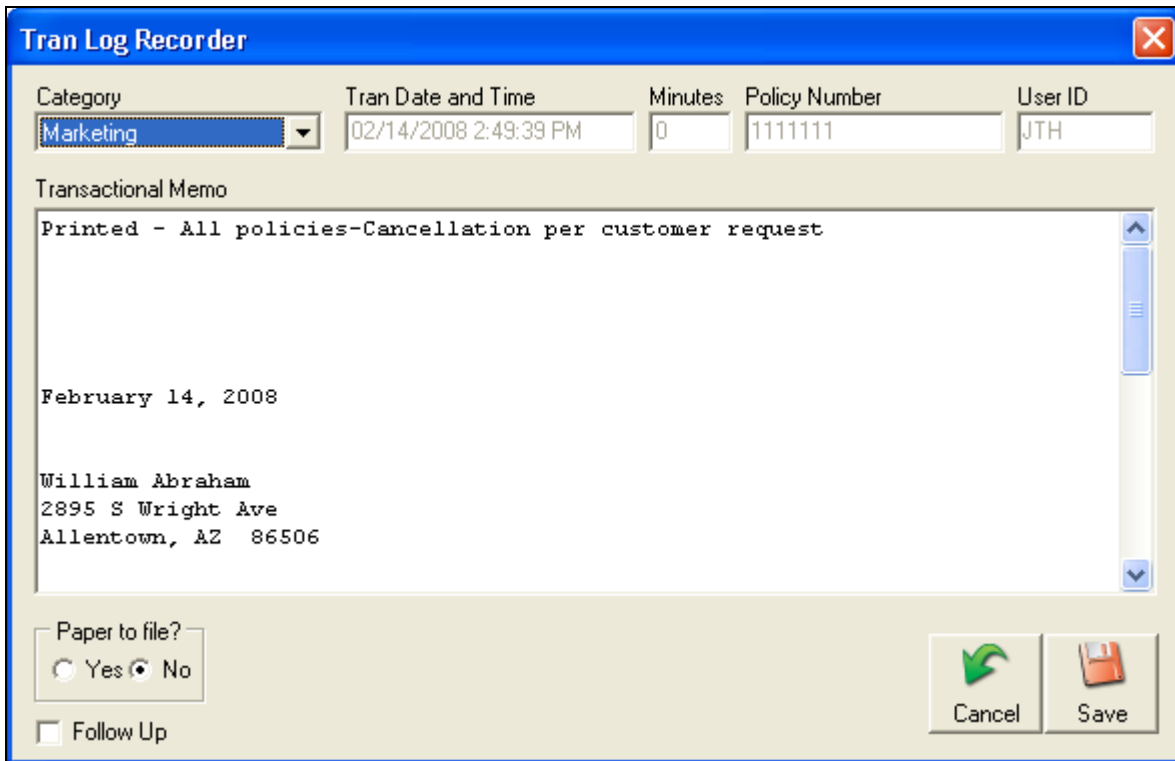
3. If prompted, select a policy and click *OK*.
4. A preview of the data that will merge with the letter will appear. Feel free to modify the data at this time. The changes made in this screen will only affect the letter. Click *OK* to send the letter to the printer.



Field Name	Merge Data(Modifiable)
ClientRef	1000272
PolicyRef	3
PolicyNumber	1111111
CSR	
LastName	Abraham
FirstName	William
StreetAddr1	
StreetAddr2	2895 S Wright Ave
City	Allentown
State	AZ
Zip	86506
Salutation	Bill & Sandy
PolicyType	Per Home App.
CompanyName	Safeco

Figure 2: Merge Data View

5. The Tranlog Recorder will open. Select *Save* to record the contents of the letter to the Tranlog or *Cancel* to discard the Tranlog. It is recommended that all correspondence with a customer be saved to the Tranlog.



Category	Tran Date and Time	Minutes	Policy Number	User ID
Marketing	02/14/2008 2:49:39 PM	0	1111111	JTH

Transactional Memo

Printed - All policies-Cancellation per customer request

February 14, 2008

William Abraham
2895 S Wright Ave
Allentown, AZ 86506

Paper to file?
 Yes No

Follow Up

Cancel Save

Figure 3: Tranlog Recorder

How to Print an Envelope

FSC Manager prints a standard size 10 envelope from Microsoft Word.

1. In the Single Letters area, highlight an envelope and click *Print*.
Note: Client Envelope -FirstName First.doc is for personal lines clients and Client Envelope - FullName.doc is for commercial clients.
2. The client name and address will preview. Edit the information if necessary.
3. Click *OK* to send the envelope to the printer. The envelope will pull from the manual feed tray.

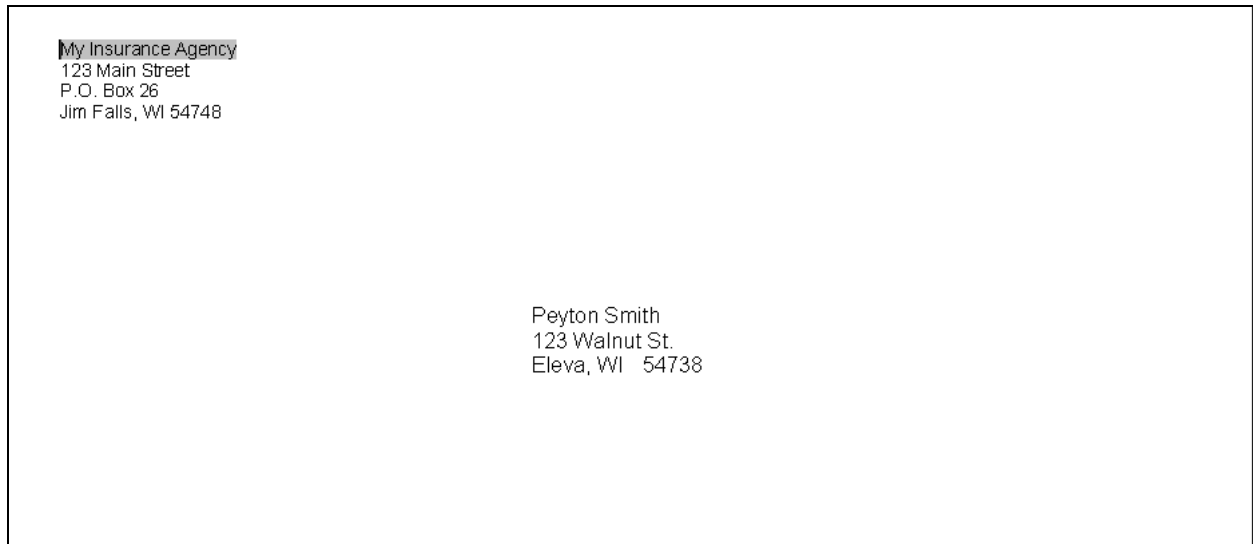


Figure 4: Envelope

The envelopes print with a return address on them. The agency may modify the envelope document to remove the return address if they use pre-printed envelopes. Use the *Modify* button. Click *OK* until Microsoft Word opens. Remove the return address. Close and save the document.

How to Print Labels from the Manager

The Manager uses Avery 5160 size labels.

1. In the Single Letters area, highlight the label and click *Print*.
Note: Client Label - FirstName First.doc is for personal lines clients and Client Label - FullName.doc is for commercial clients.
2. The client name and address will preview. Edit the information if necessary.
3. Select the print position for the individual label. The labels page has three labels across and ten labels down. Count from left to right and top to bottom. Enter the label number in the box.

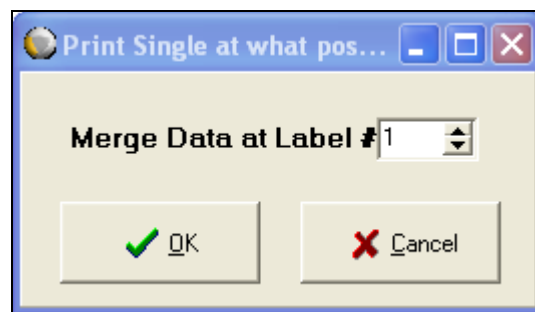


Figure 5: Label Numbering

4. Click *OK*. The labels need to be placed in the manual feed tray.

How to Create a New Single Letter Template

1. In the Single Letters area, click the green plus.
2. Give the letter a *Title*.
3. Select the tables containing the information that will be inserted on the document.
 - a. This is done by selecting Clients (client name, address, phone number, etc) or Clients and GenAppInfo (client name, address, phone number, and general policy information) in *Tables Available*.
 - b. To add additional tables, select a table name in the *Tables Available* drop down. Highlight a table name and click the *Add Table to Selected* button. Other common tables used in letters include:
SubAgencyList – agency name and address
CompanyList – carrier name and address
Producers – producer name and address

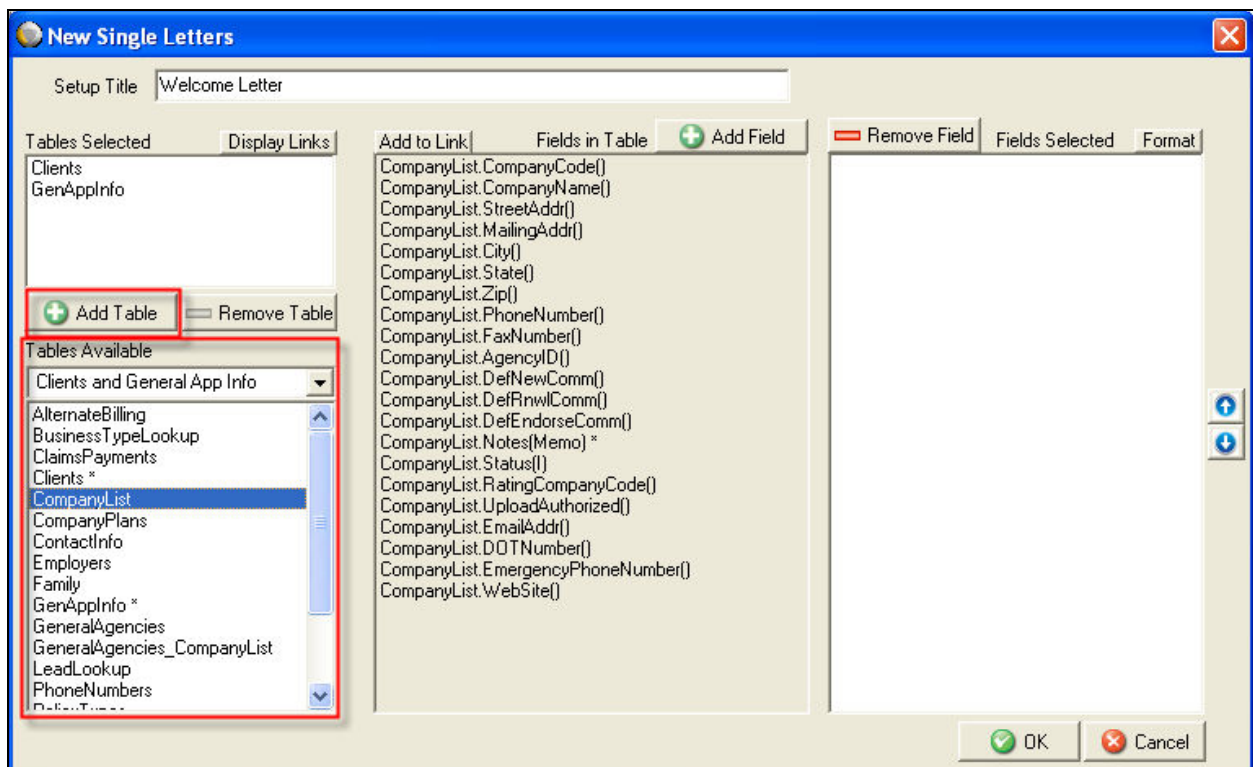


Figure 6: Single Letter Template Setup

4. Select the individual fields from the table that will be used in the letter.

- a. Highlight the table name in *Tables Selected*.
- b. Highlight a field in *Fields in Table*.
- c. Click the *Add Fields to Selected* button.
- d. Repeat the process until all fields needed are listed in the *Fields Selected* on the right.

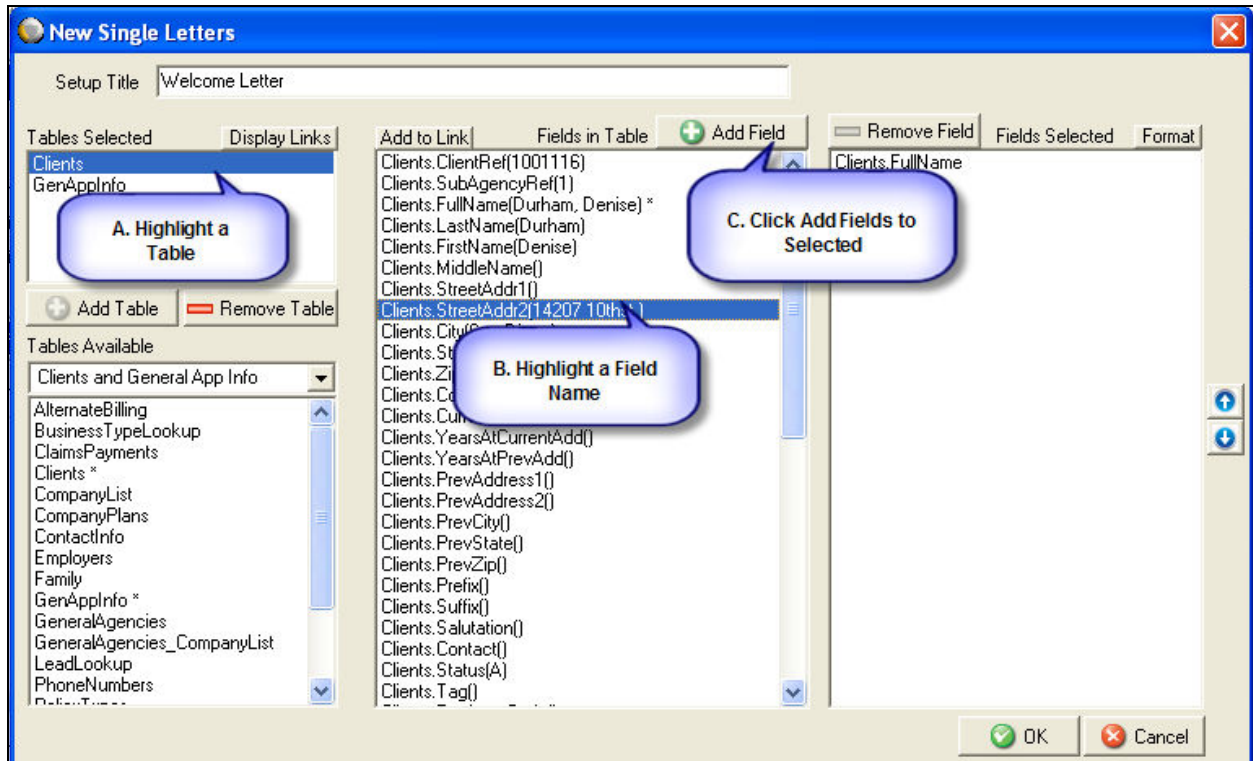



Figure 7: Single Letter Template Setup

5. Click **OK** to proceed. The user may be prompted to select a policy if the *GenAppInfo* table is used in the *Fields Selected*. Highlight a policy and click on **OK**.
6. At the *Merge Data View*, click **OK** to proceed to the next step of setting up the letter in Word.
7. Set up the letter in Microsoft Word.
 - a. The words *“Press INSERT MERGE FIELD button when merge field desired”* is instructing the user what to do next. Delete these words, so they will not print on the document.

Insert the merge fields. Place the cursor where the merge field will display. Click on the *Insert Merge Field* button . Highlight a field on the list and click **Insert**. Multiple fields can be inserted. Once this box is closed, the user will have to place spaces and punctuation between the fields on the document.

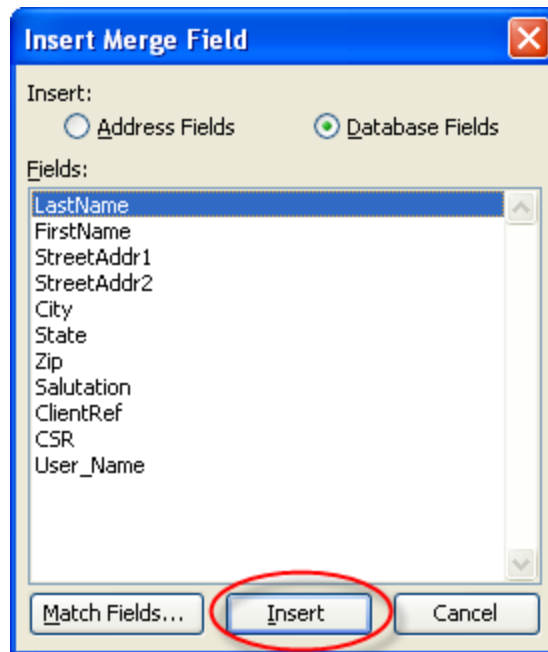


Figure 8: Insert Merge Field

- b. It is recommended that the user insert the date rather than typing it. Go to *Insert->Date and Time*. Select a date format and check mark *Update automatically*. This means that the letter will use the current date on the computer each time it is printed.
- c. Type the body of the letter.
- d. Adjust margins as needed.
- e. Spell check the document.

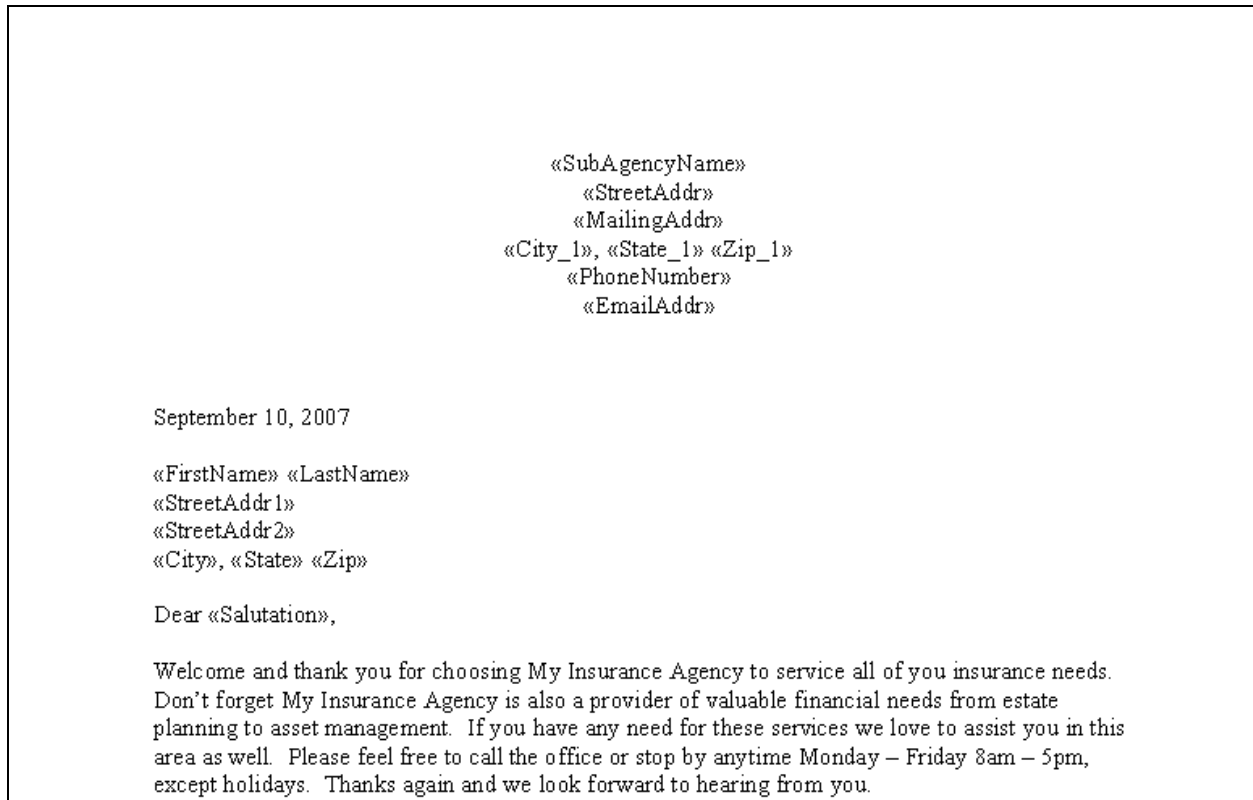



Figure 9: New Template Document

- f. To view how the merged information will look in the letter, click the View Merged Data button on the Microsoft Word toolbar. (It is to the right of *Insert Word Field* and will have ABC on it.)
 - g. Close Microsoft Word and save the changes when prompted.
11. To print the letter, highlight the document on the Single Letters list and click *Print*. Click *OK* at the *View Merged Data* and the letter will be sent to the printer using the client's information.

How to Modify an Existing Letter

1. In the Single Letters area, highlight the letter and click the Modify button .
2. This will open the screen that allows users to add or remove items from the *Fields Selected* area. For more detailed information, review the instructions for creating a new Single Letter Template. Click *OK* to proceed.
3. At the *View Merge Data* screen, click *OK*.
4. When Microsoft Word opens, the user may edit the text, insert or remove merge fields, change margins, etc. Close Microsoft Word and save the changes when prompted.

Read Only Option

Users can set a Single Letter to read-only, this will disable the Modify function until the user removes the check from the *Read Only* option, see below.

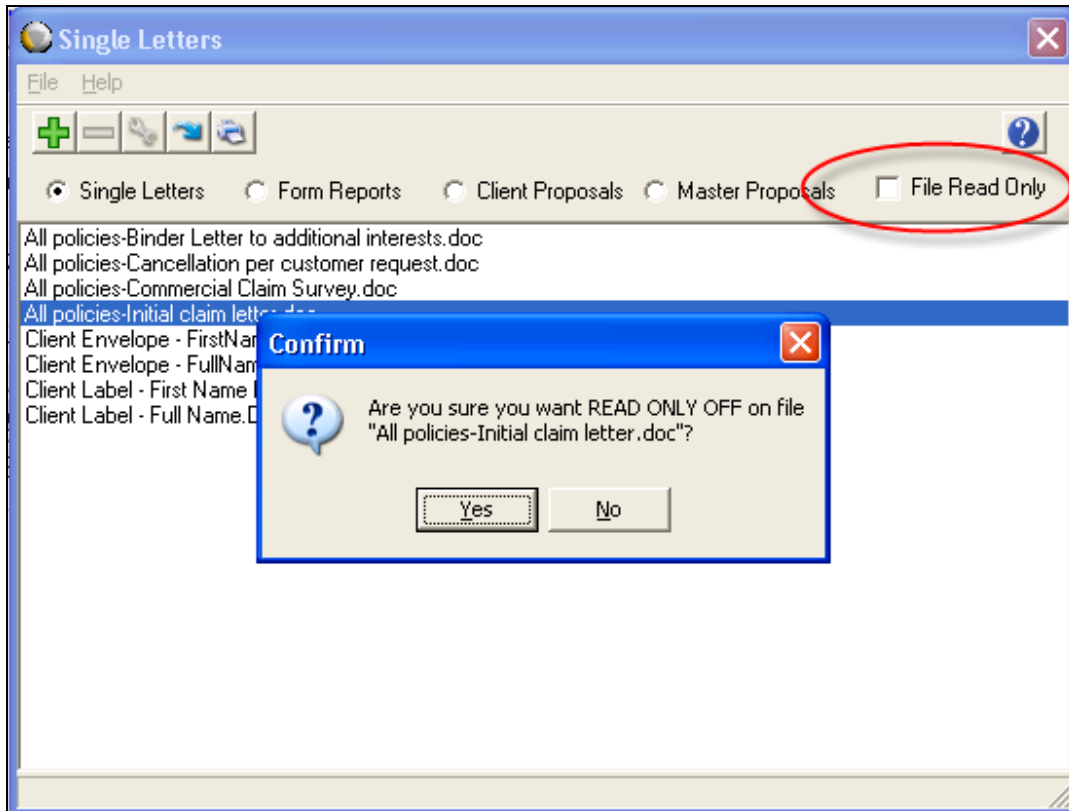


Figure 10: Read Only

To set the Read Only option the user must put a check in the *File Read Only* check box. To remove the read-only setting, the user must highlight the letter to remove the read-only option from and click the *File Read Only* check box, this will pop up the warning above. If the user selects yes the letter will no longer be read-only and will be able to be modified.

Obtaining Support

If you have any questions about this training, please contact FSC Customer Support. Thank you and enjoy using FSC Manager!

West Coast Customer Support: 800-433-2550
Midwest Customer Support: 800-401-2895
Email: fscmanagersupport@fscsolutions.com

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