



FSC Manager

» **Proposals**



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Introduction

FSC Manager gives users the ability to create a proposal using the ACORD applications for a selected client and merging them into a Microsoft Word document. These documents can be used as a proposal for new business or as a summary for existing clients.

This chapter will review how to create a new proposal or modify an existing proposal. It will also offer instructions on how to modify the master proposal templates.

Proposals

How to Create a new Proposal

1. Open a Client screen.
2. Click on the *Client Letters* button on the toolbar.
3. Click the circle next to *Client Proposals* to view the proposal list.
4. Click the plus button.

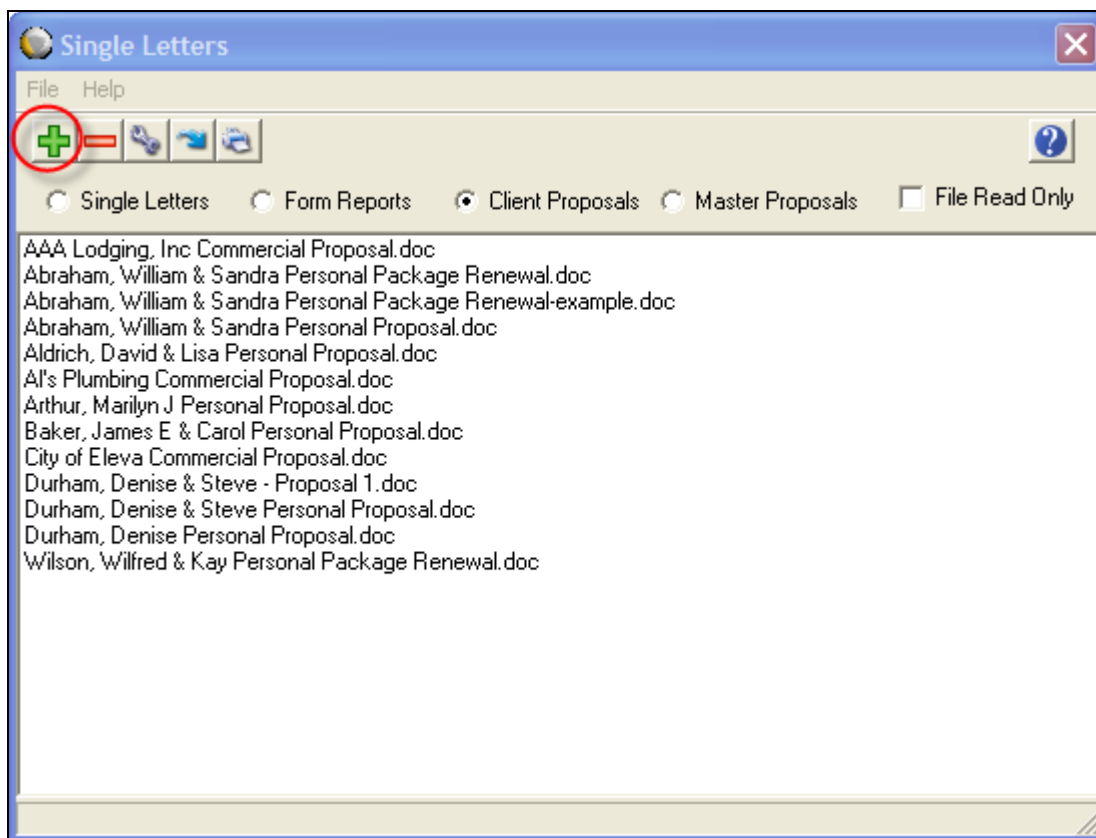


Figure 1: Proposals

5. Choose the Proposal Type from the dropdown list.
6. By choosing the proposal type, the name of the proposal and the *Items Selected to Add on Printing* will be filled in from the Client's active policies.
7. To change the order of the items selected highlight the item to move and use the up or down arrows to move it in to the desired position.
8. *Items Available to Add on Printing* can be added to the proposal provided the client has that type of policy. To add an item from this list highlight the item and click *Add Item to Selected*.
9. Leave the checkmarks in *OK All Document Data* and *OK All Report Data*.

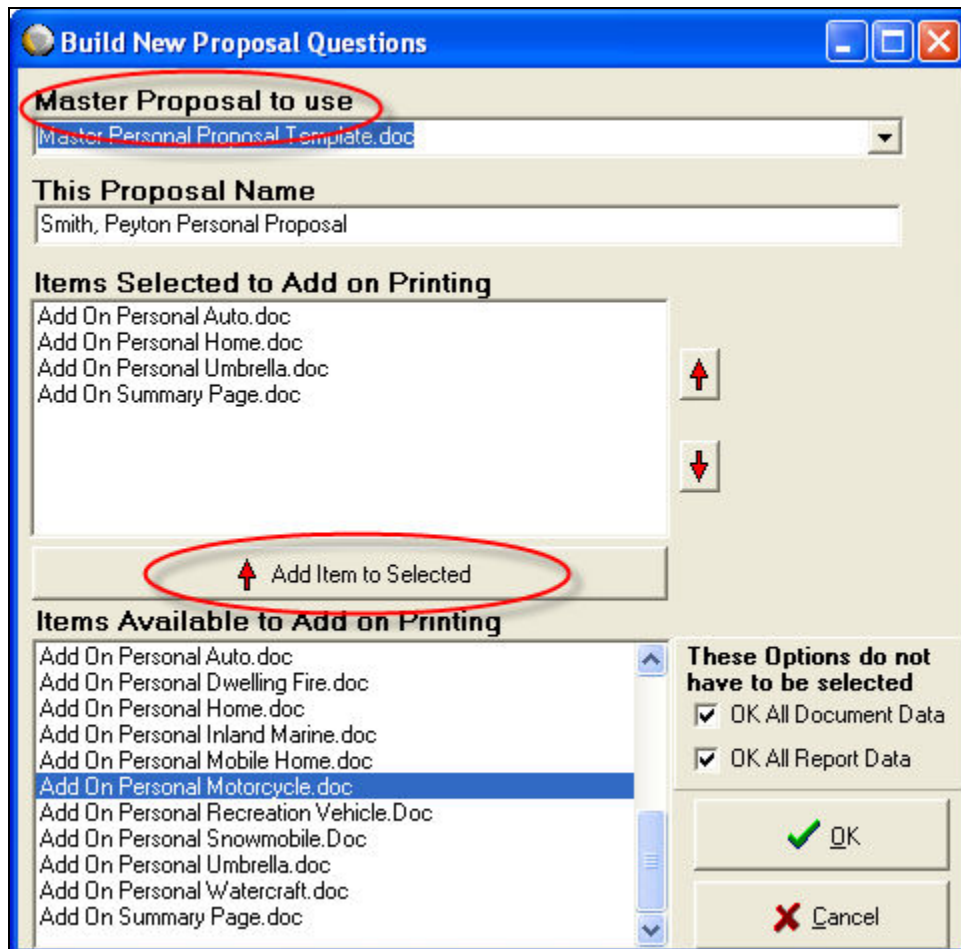


Figure 2: Proposal Builder

10. Click *OK* to create the Proposal.
11. To view the proposal highlight and click *Modify*.

12. Clicking *Modify* will open the proposal. This document can now be modified (e.g. move text and/or remove any unwanted fields). **Don't forget to save changes.**

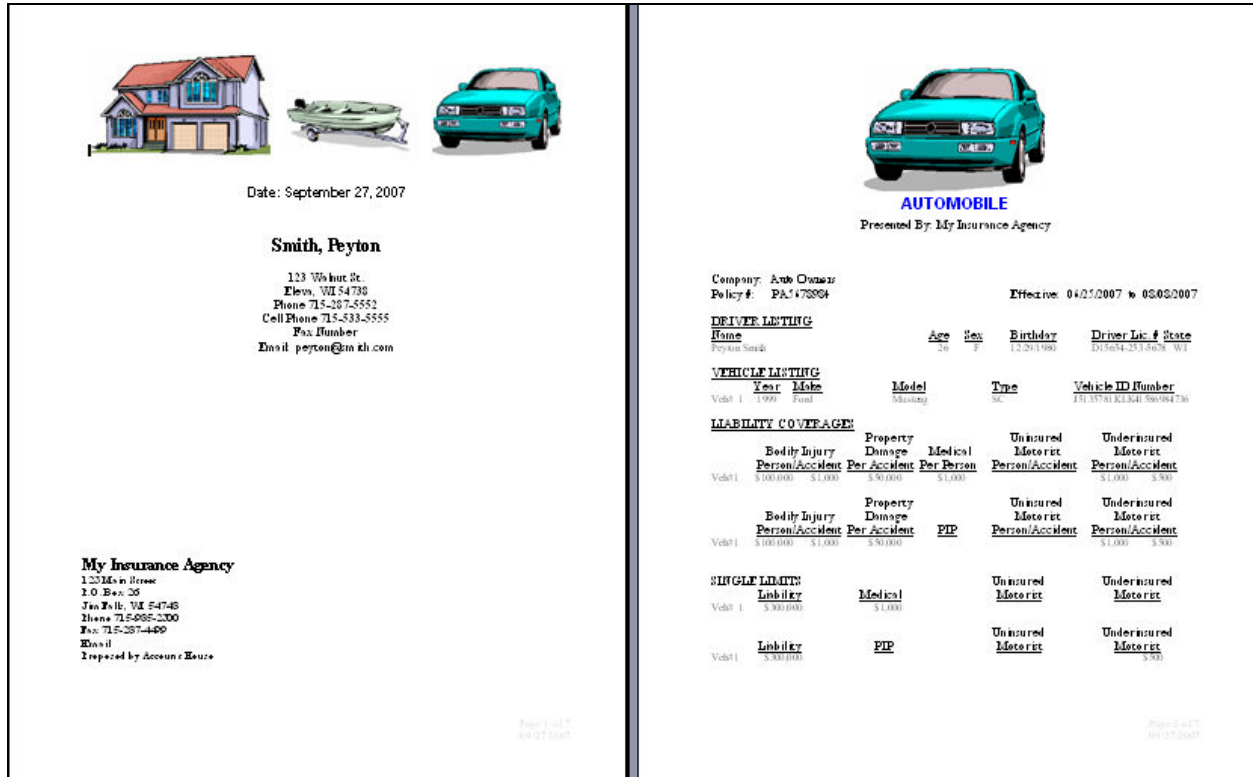


Figure 3: Sample Proposal

13. Close and save changes to the proposal. To print, highlight the proposal and click *Print*.
14. When a proposal is printed this way a tranlog with complete information will automatically be created.

How to Modify an Existing Proposal

1. Click *Client Letters* from the Client Screen toolbar.
2. Click the circle next to *Client Proposals* to view the proposal list.
3. Highlight the proposal to modify and click *Modify*.
4. This will open the proposal in Microsoft Word and allow changes to be made. **Don't forget to save changes.**
5. To keep a copy of the original proposal before the changes, highlight the original proposal and click *Copy*.
6. Name the copy with a slightly different name then modify the copy.

Read Only Option

Once a Proposal has been created users can set it to read-only, this will disable the Modify function until the user removes the check from the *Read Only* option, see below.

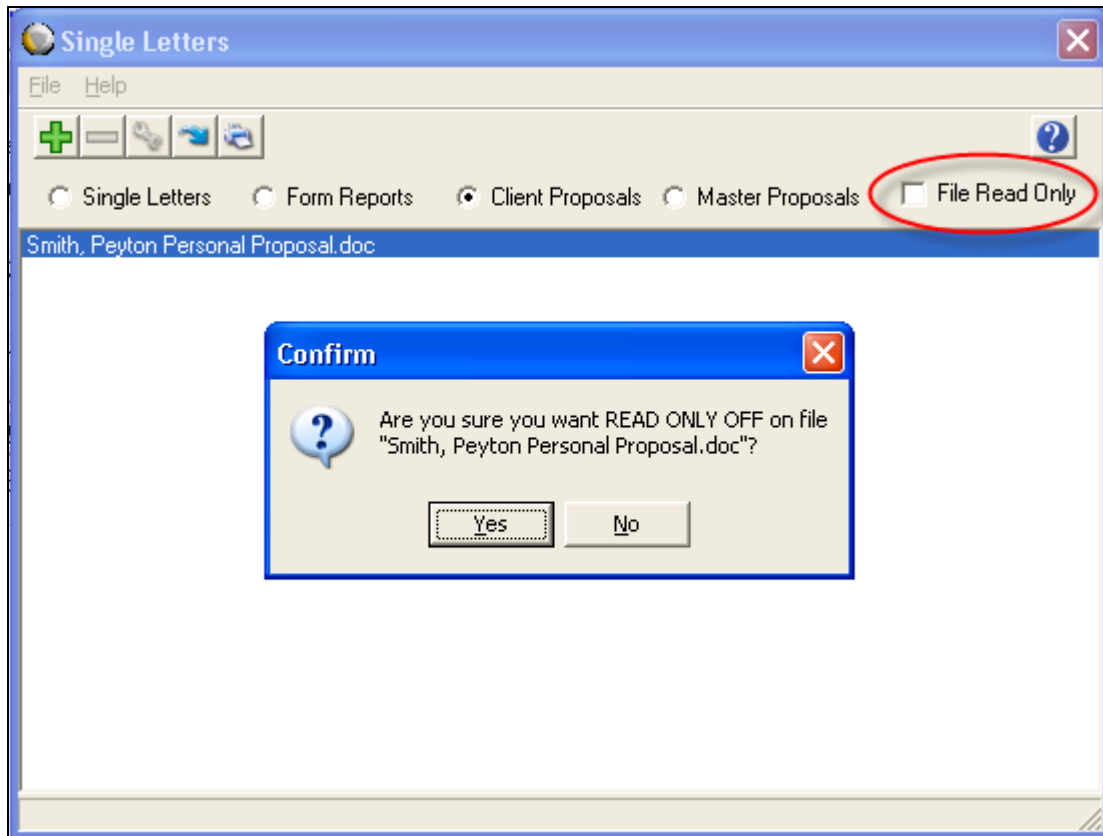


Figure 4: Read Only

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.

How to Modify Master Proposal Templates

1. Click on *Client Letters* from the Client Screen toolbar.
2. Click the circle next to *Master Proposals*.
3. *File Read Only* is checked.
4. Remove check mark from *File Read Only* to make changes.
5. Highlight the Master Proposal Template to change and click *Modify*.

6. This will open the Proposal setup area.
7. To add new fields to the Proposal, highlight the field in *Tables Available* and click *Add Table to Selected*.
8. Highlight the table in *Tables Selected* to display the *Fields in Table*.
9. From *Fields in Table* highlight the field to add and click *Add Fields To Selected*.
10. To view changes in the proposal format, click *OK* to open the Word document and show the merged fields.
11. Changes can also be made to the Word document using the tools in Word.
12. Make sure to save all changes.

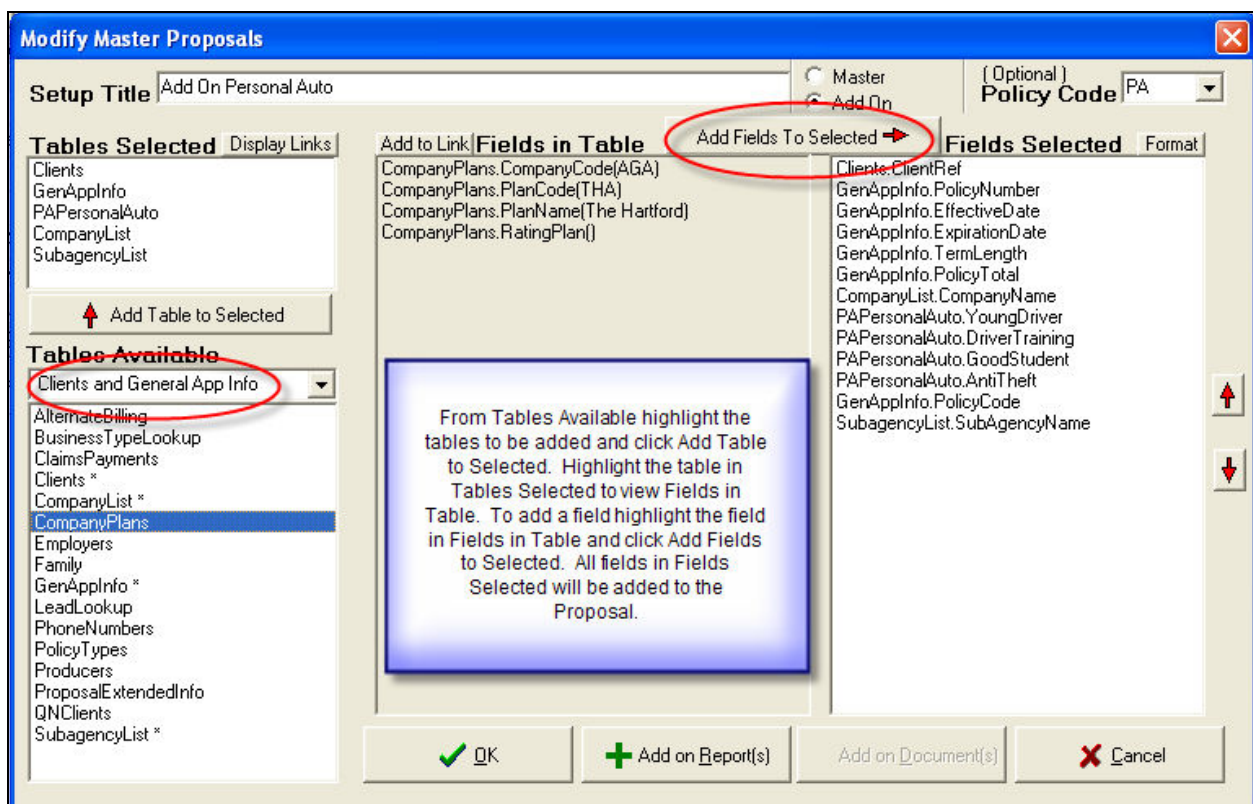


Figure 5: Proposal Setup



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

Last Updated 08/09/2011