FSC Manager

» System Setup

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Introduction

As soon as FSC Manager is installed, the agency should complete the System setup. This mainly involves entering the agency name, producers, companies and default commission percentages. Having this information setup before users begin using the system will ensure that all areas of FSC Manager are properly functioning together.

This chapter will explain how to add to or modify the list of sub-Agencies, producers, companies and commission Rates. It will also explain the other system defaults and provide instruction on how to setup scanned signatures for use on ACORD applications and forms.

System Information

To access the System Information click the *System* button on the Banner. Notice the toolbar at the top of the System area.

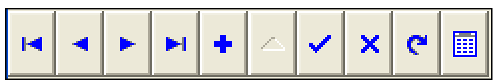


Figure 1: Toolbar

The first four buttons are Navigator buttons. They allow users to move between records: go to the first record, go back one record, go forward one record and go the last record.

The plus button is used to add new records. If an area is blank, it is not necessary to click the plus button, simply type in the record. All data is saved automatically when the *System* area is closed.

The up arrow is used when the user wants to edit a record. The checkmark will post (save) the edit. The x will cancel the edit.

The rounded arrow button will refresh the data.

The grid button will open the grid view for the tab you are viewing.

Sub-Agencies, Producers and Companies can not be deleted; however, they can be made *Inactive* in the *Status* field. At the top of each tab is a *Display* filter. This filter defaults to displaying only *Active* records. The user may view the Inactive records by changing the *Display* filter to *Inactive* or *Both.*

Figure 2: Display Filter

The *Search* field on each of these tabs is used to find a producer or company in the system by typing their name.

Sub-Agencies

This tab contains the agency information: name, address, phone numbers and email address. This integrates with various parts of the system such as ACORD applications, forms, letters and memos. If an agency has multiple locations, additional sub-agencies may be added. This allows reports to differentiate data between sub-agencies.

Each client is assigned to a sub-agency by the user when the client is first added to the system. All users will be able to see all clients regardless of sub-agency.

To add the first agency, simply begin entering the agency information. To add additional sub-agencies use the plus button. When multiple sub-agencies exist, go to the *System Defaults* tab and delete the agency name from the *Default Sub-Agency* field. If this is not removed, all new clients will continue to be assigned to the default agency. When this field is blank, the system will prompt the user to assign each new client to a sub-agency. All new information will save automatically when the *System* area is closed.

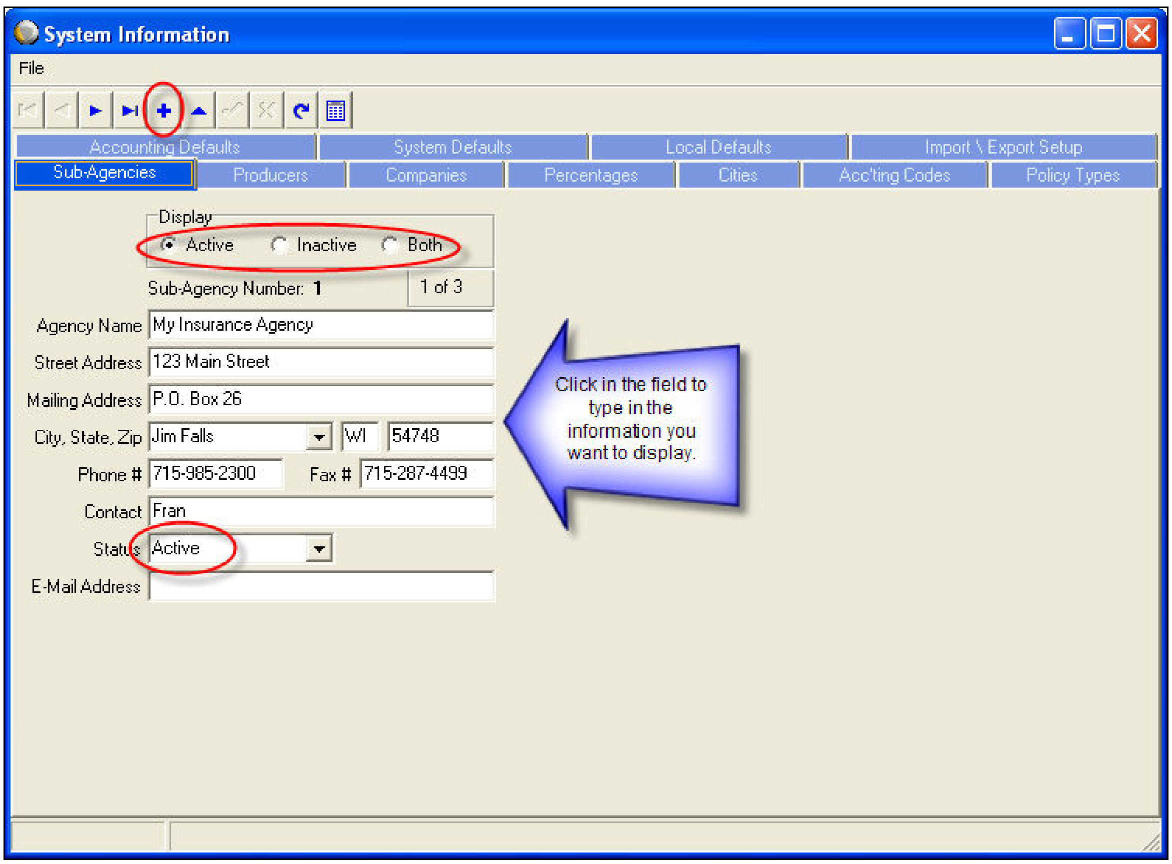


Figure 3: Sub-Agencies

Producers

This tab stores producer information. Producers can be assigned to clients/policies for purposes of reports, marketing and tracking commissions. Enter the producer’s first, middle and last name and hit tab. A three letter code will be assigned to the producer automatically. Many of the fields are optional: *Street Address, Mailing Address, City, State, Phone, FAX, License Number, Expiration, Sub-Agency, Social Security* and *National Number.* These optional fields do not integrate with any other area of the system.

The following fields must be completed: *Producer Type, Base, Default Commission %*. These areas integrate with the commission tracking for producers. Even if a producer is not paid on commission, it is best to enter a *Base of Commission Based* with *Default Commission %* of zero.

> *Producer Type* – Most producers are *Agents*.
>
> *Base* - *Commission Based* means the producer will be give a percentage of the agencies commission. *Premium Based* means the producer will be given a percentage of the entire premium. Most producers are *Commission Based*.
>
> *Default Commission %* - *New %* is the commission percentage give on new policies. *Renewal %* is the commission on renewed policies. *Days New* is the number of days the agency will consider a policy new and pay the producer the *New %*. If most policies written by the producer are an annual term length, then enter 365. If the producer receives the same percentage for new and renewal, the *Days New* could be left at 0.

Use the plus button to add additional producers. Each time a producer is added, the following message will appear when the user changes tabs or exits the *System* area.

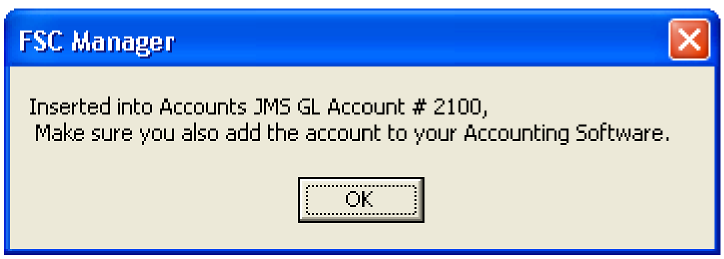


Figure 4: Inserted General Ledger Number

Companies

This tab stores Company information. This area integrates with ACORD applications, forms, letters and memos and emails.

Enter the company name and hit tab. A three letter code will be assigned to the company automatically. Continue to enter the *Address, Phone Number* and *Email Address*. The *Agency ID* is the agency's contract number or producer code with the company.

If a company will be downloading policies to the system, the *Plans* will be set up by the trainer or customer service representative when the download setup is done. If the carrier does not download, then the agency may enter the plans themselves. *Plans* are the carrier specific tiers such as Standard, Preferred, and Elite. Each company will have different names for their plans and some companies may not have plans.

Each carrier should only be entered once in the *System* area. If there are multiple addresses, enter these in the *Address Book* on the Banner. If there are multiple contacts at the carrier, these can be listed in the *Contact Information* with email address and phone numbers. This area integrates with email.

On the *Companies* tab the user will also be able to add *Contacts*, *Notes* and create *Tranlogs, Followups, Emails* and *Memos*. The user will also be able to attach documents and images to the company record. Please see the chapters on these areas to learn how each works.

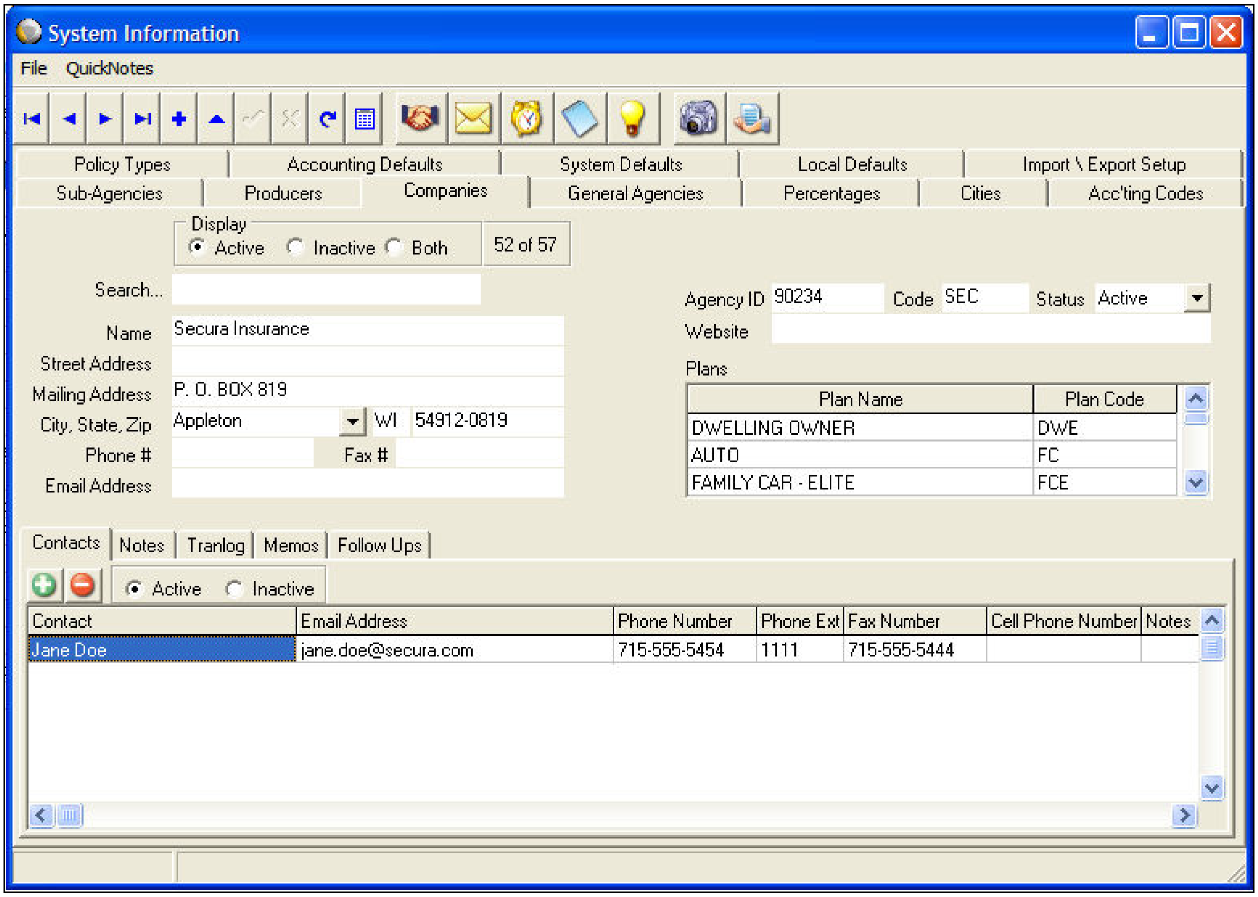


Figure 5: Companies

General Agencies

The *General Agencies* tab will be used to enter *General Agencies* on the policy screen when a piece of business is being brokered through a general agency. For each general agency that is added, a new general ledger account will be assigned to the chart of accounts. When a policy is assigned a general agency, any agency billing that is done, will create a payable amount to the general agency rather than to the carrier.

The user will fill out the *General Agencies* tab using the same directions as above for the *Companies* tab. The user will also be able to add *Contacts, Notes* create *Tranlogs, Follow ups, Emails* and *Memos* and attach *Images* for the general agency. Please see the chapter on each of these areas to learn how they work.

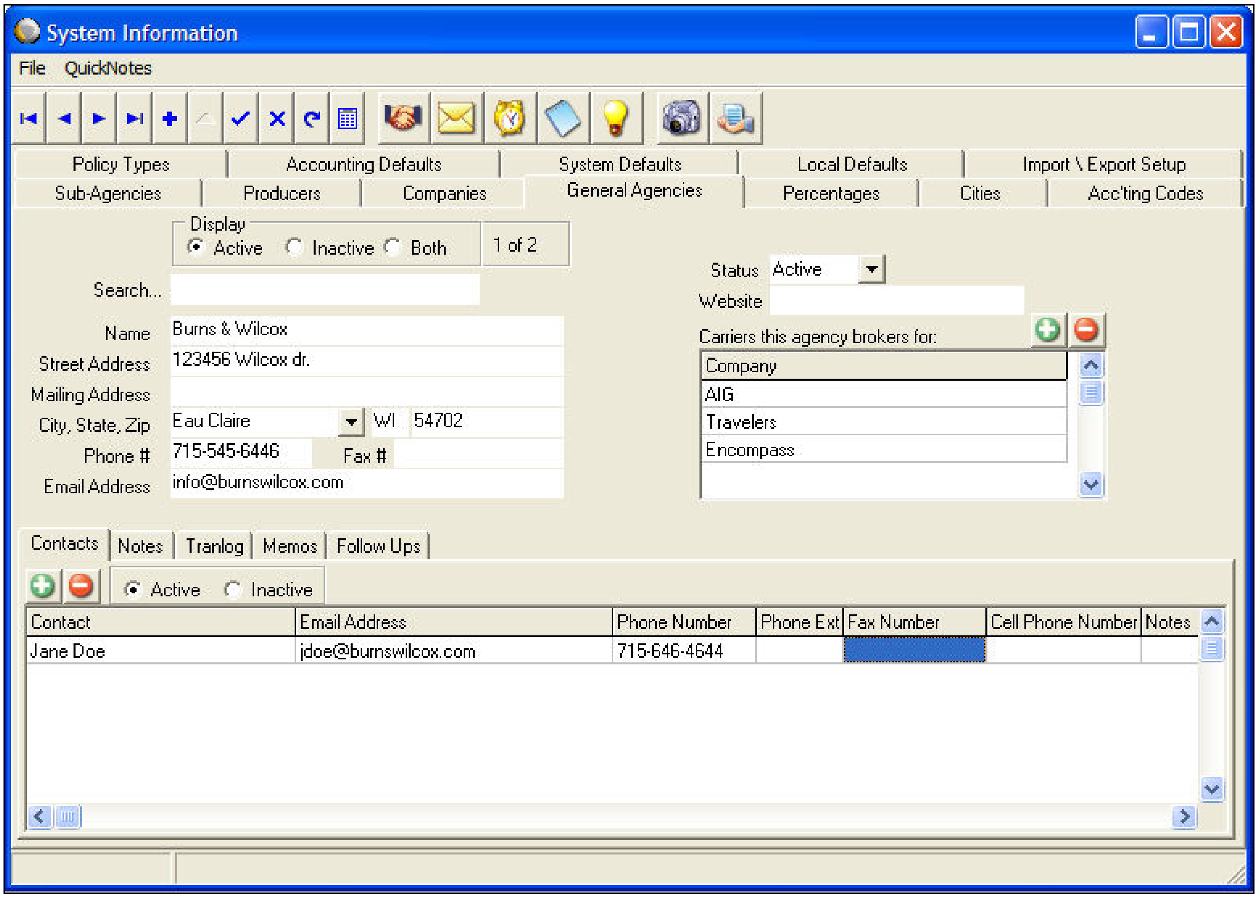


Figure 6: General Agencies

Percentages

This tab stores the agency's default commission percentages and the producer commission splits with each carrier. Even if a carrier is downloading commission statements, this should be filled out. Several of the reports in the system calculate annualized commissions and will utilize these defaults percentages for that purpose. We recommend using the *Auto Fill* feature. This will mass load a commission percentage for all policy types. Even if the agency does not write that line of business, it will not harm the system to have a percentage. Our experience has been that agencies frequently miss lines of business if they do not use the *Auto Fill* feature.

There are two scenarios that can not be handled in the *Percentages* defaults. They have to be handled on a per policy basis: Workers compensation policies that give a different commission percentage based on the premium amount and youthful drivers because the commission is different on only one vehicle not the entire policy.

Once commission percentages are entered here, they will populate into the Billing Setup area of the system. If the commissions need to be changed here, they will also have to be changed on each policy in *Billing Setup*.

Agency Commissions

1. Search for the company.
2. In the three blanks to the right of the *Auto Fill* button, enter the most common rate the agency receives for new business, renewals and endorsements.
3. Click the *Auto Fill* button.

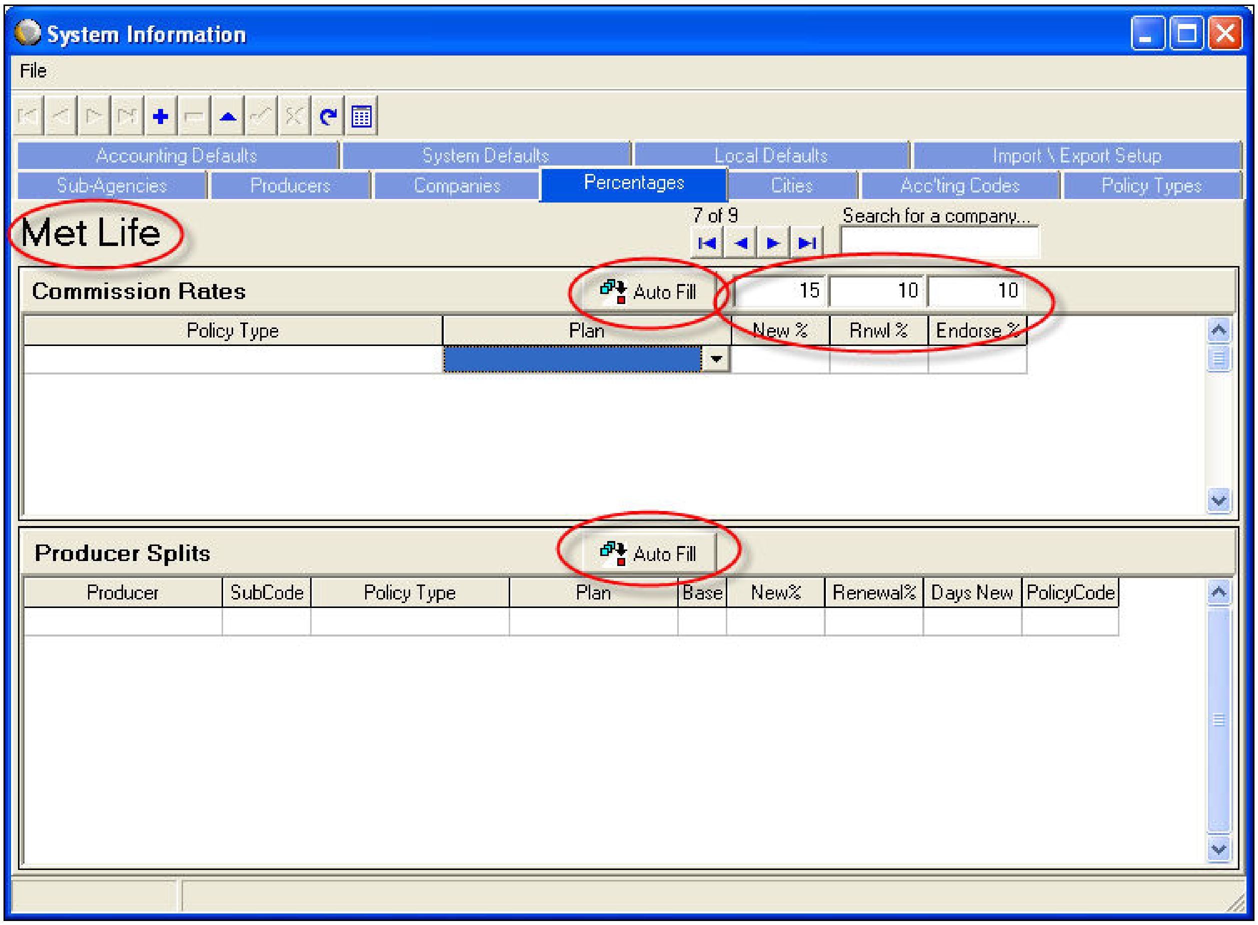


Figure 7: Percentages

4. This will display a list of all policy types in FSC Manager. Click the *Select All* button to highlight the records and click *OK*.

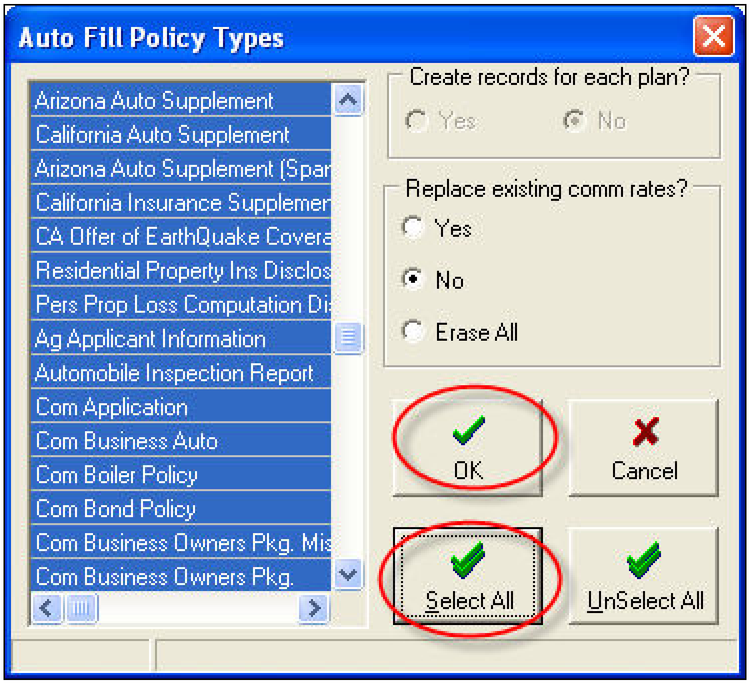


Figure 8: Auto Fill Policy Types

5. This will pre-fill all policy types with the rates entered for *New, Renewal* and *Endorsement*. If a percentage is incorrect, the user can change the percentage in the grid.

Policy Type	Plan	New %	Rnwl %	Endorse %
Arizona Auto Supplement		15	10	10
California Auto Supplement		15	10	10
Arizona Auto Supplement (Spanish Ver)		15	10	10
California Insurance Supplement		15	10	10
CA Offer of EarthQuake Coverage		25	10	10
Residential Property Ins Disclosure		15	10	10

Figure 9: Change Percentage

6. Some carriers may have multiple commission tiers for the same line of business. Commission rates can be broken down further by plan.
    a. Add a new line by hitting the plus button.
    b. Select the line of business in the *Policy Type* field using the drop down box.
    c. Select a *Plan* from the drop down box. The plan list comes from the *Companies* tab.
    d. Enter the commission percentage for that plan.

Producer Splits

This area contains the producer commission split with each carrier. Again, using the *Auto Fill* button is recommended. This should not be done unless the producer commissions have been entered on the *Producers* tab.

1. Click the *Auto Fill* button.

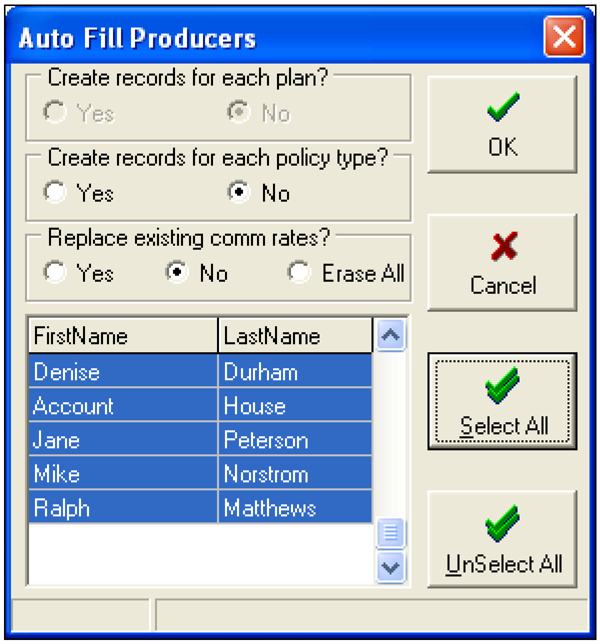


Figure 10: Auto Fill Producers

2. This will list out all of the producers. Click on *Select All* and click *OK*.
3. This will pre-fill the commission splits for all producers using the percentage entered on the *Producers* tab. If a percentage needs to be modified, change it in the grid.

Producer	SubCode	Policy Type	Plan	Base	New%	Renewal%	Days New	PolicyCode
Durham, Denise					25	15	187	
House Account				C	25	15	187	
Peterson, Jane P				C	30	20	365	
Mike T. Norstrom				C	50	25	365	
Matthews, Ralph R				C	50	25	365	

Figure 11: Change Producer Commissions

Cities

This tab contains a list of all cities, states, zip codes and counties in the United States. Put a check mark in the states that the agency writes business. When entering a client, the city, state and zip will be a drop down box that pulls from this list. If a city needs to be added to the list, click the plus button and type the new city, state, zip and county. If a city is being removed, highlight the record and hit Control+Delete. Agencies have a choice of having the list appear in either initial caps or all upper case. The default is initial caps. If the agency would prefer all upper case, then click on the *Upper Case* button.

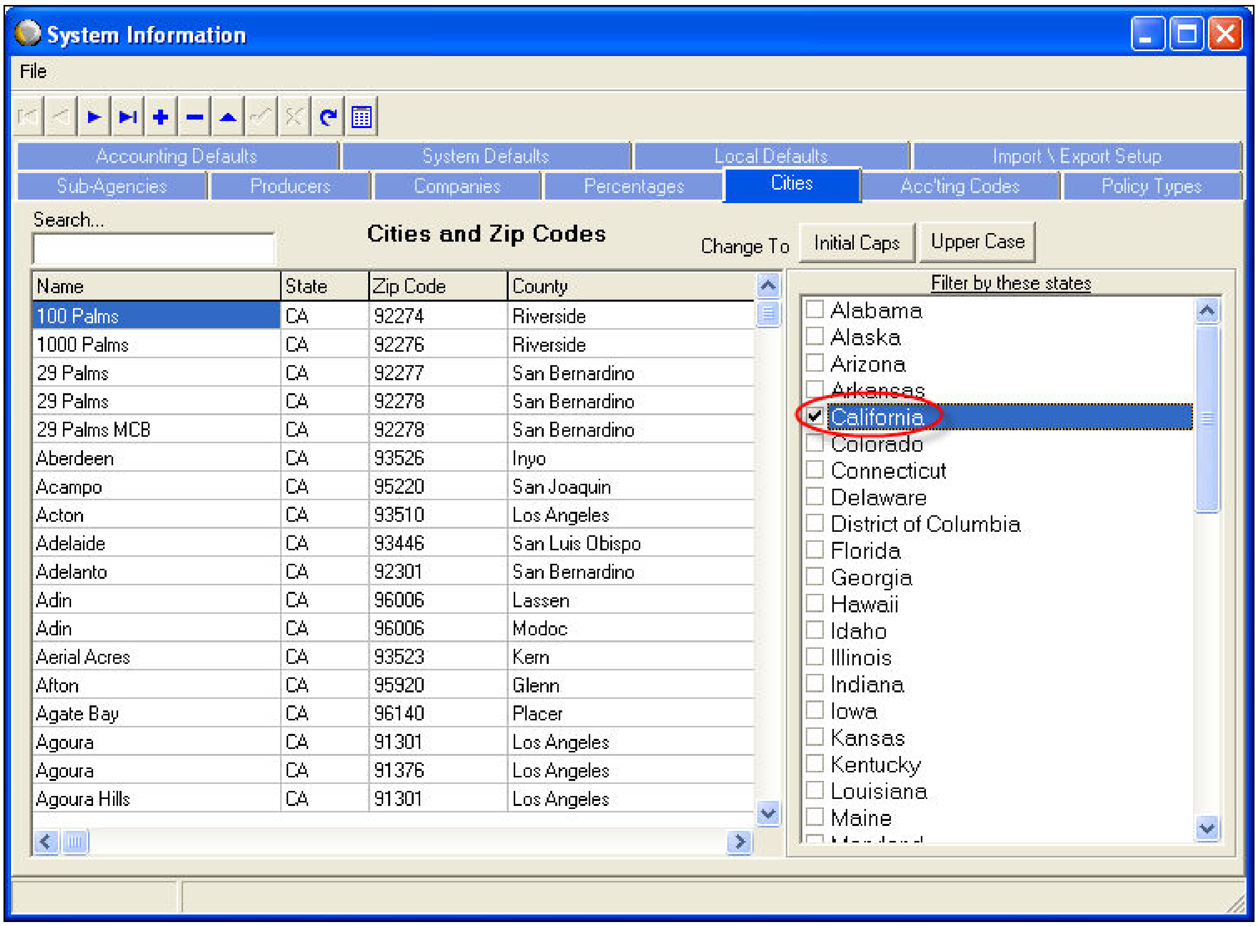


Figure 12: Cities Tab

Policy Types

This tab contains a list of all the policy types in FSC Manager. Some policy types do not use an ACORD application. These are indicated with the abbreviation MISC in the Application column. Agencies may not add new policy types to the system. New miscellaneous policy types can be added by contacting Customer Service.

System Defaults

Most of the System Defaults will be determined during the installation process. These settings can be altered as needed. Several of these defaults are explained in the chapter covering the following topics: Tranlogs, Memos and Imaging.

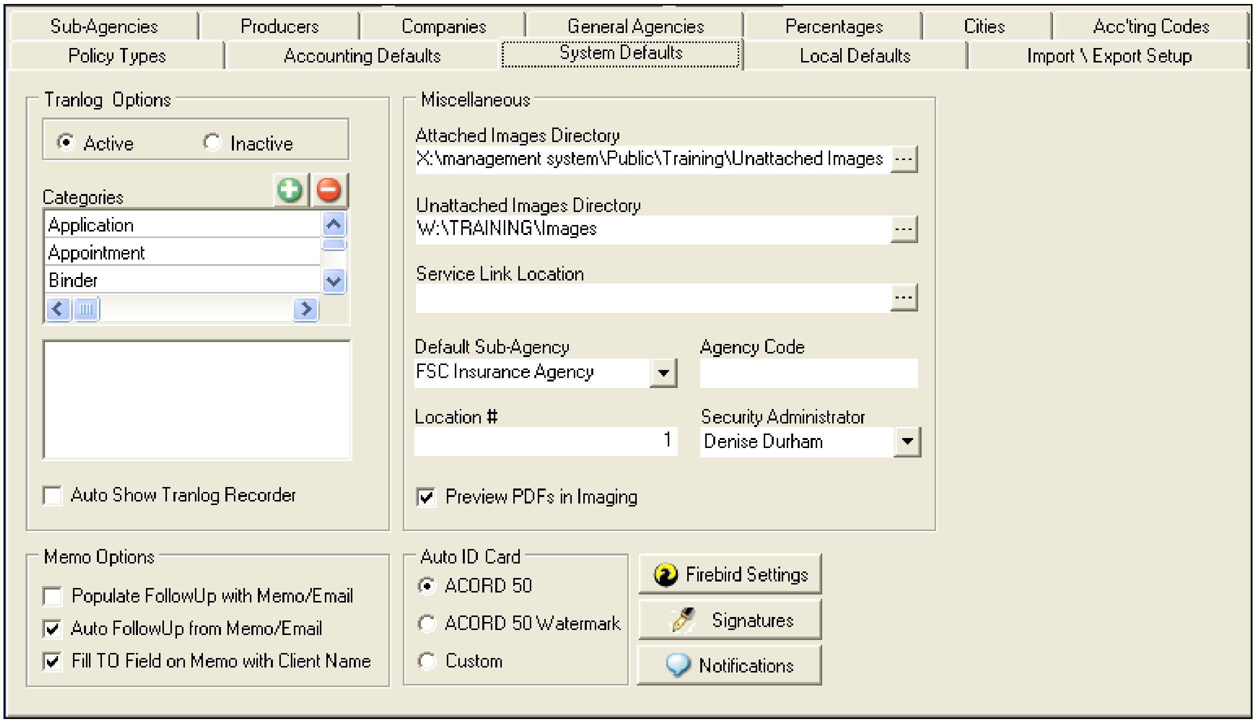


Figure 13: System Defaults

A *Default Sub-Agency* should be selected if the agency has only one location (sub-agency). If the agency has multiple locations, leave this field blank. Each time a client is added, the system will prompt the user to assign it to the appropriate location.

Auto ID Card allows the agency to select the *ACORD 50, ACORD 50 Watermark* or a *Custom* ID. The ACORD ID cards can be emailed out of the system. Selecting an ACORD ID will print ID cards that are applicable to the agency's state. The custom ID card can not be emailed. The custom ID card is not state specific. It prints three ID cards to a piece of paper.

Firebird Settings are settings for the Firebird database. These settings should only be altered with the help of Technical Support when necessary.

Signature Setup

FSC Manager supports inserting a scanned signature into an ACORD application or form so that a user can easily email ACORD documents. To setup scanned signatures follow the steps below.

1. Sign a piece of paper and scan the document

   a. When signing the paper, use a dark pen, sign in a straight line and keep the letters similar in scale to each other.
   b. Scan the document and save as a monochrome bmp. If the scanner does not allow for this, scan and save as a jpg. Then open the jpg in Paint and save as a monochrome bmp.

2. Load the signature into FSC Manager. (Must be a level 1 user to do the remaining steps)
   a. Click on the *System* button on the Banner.
   b. Go to the *System Defaults* tab.
   c. Click the *Signatures* button.
   d. Click the menu item *Signature -> Insert from File*.
   e. Browse to find the bmp file created and saved in step 1 above and open it.
   f. The signature will display in FSC Manager. Use the mouse to click and drag a box around the signature. Include the entire signature, but as little white space as possible around the signature.

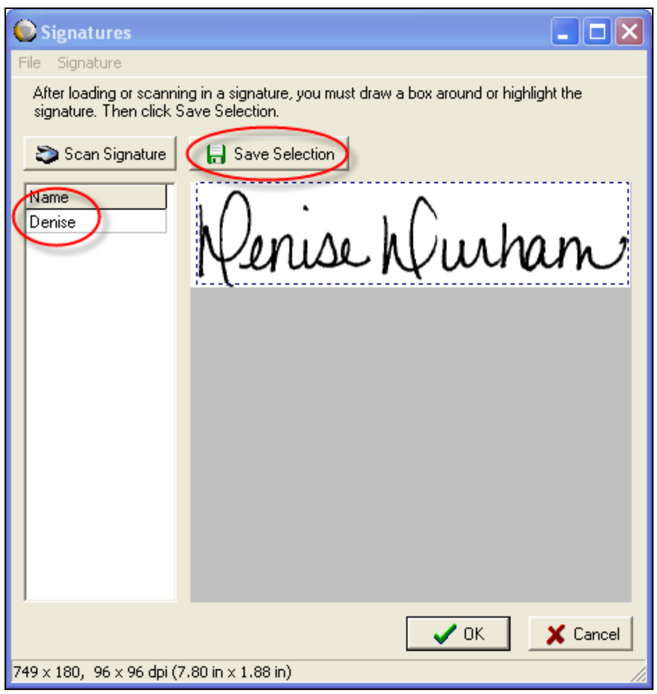


Figure 14: Signature Selection

   g. Click the *Save Selection* button.
   h. Assign the Signature a name and click *OK*.
   i. Click *OK* to save signature.

3. Assign the signature to a user(s). This enables the agency to control a user's access to signatures in the system.
   a. In the *System Defaults*, click on *Signatures* button.

b. Click the menu item *Signatures -> Authorization*.

c. On the left, highlight the user.

d. On the right, select a signature name from the drop down.

e. Click the + button to add additional signatures to the same user.

f. Click *OK* to save assigned signatures.

g. Click *OK* to save settings.

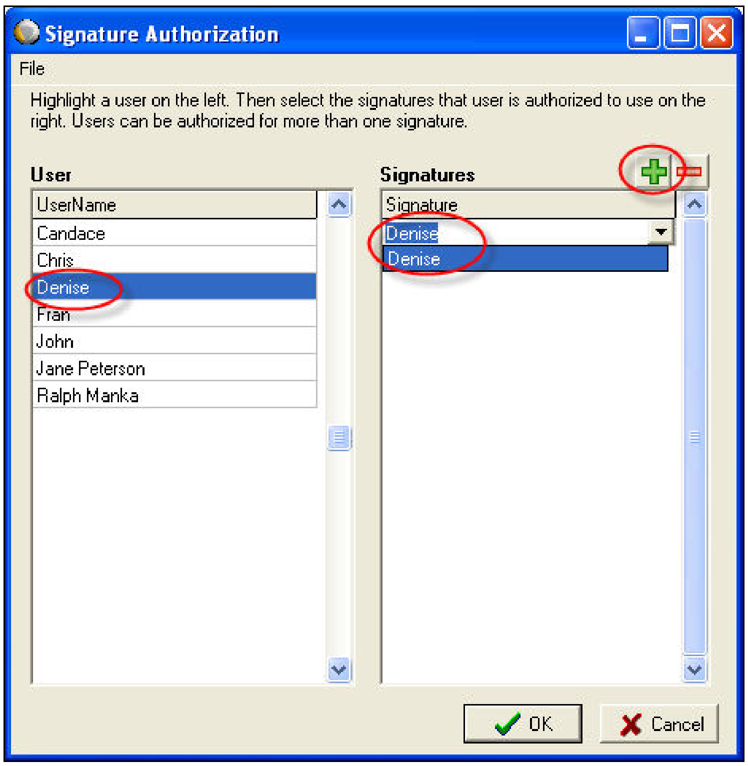


Figure 15: Signature Authorization

Notifications

FSC Manager will deliver information to the user through Notifications that will appear on the Main Screen below the Followups. There are four types of Notifications: Scheduled Download, Download Premium Change, Database Maintenance Tasks and Up Front Imaging.

NOTE: Any user may receive a Notification; however, security rules do apply. Example: If a user is not authorized to access the Premium Change report, they may still receive a Download Premium Change Notification, but will not be able to open the Notification.

Notification Setup

1. Click on the *System* button on the Banner
2. Go to the *System Defaults* tab

3. Click the *Notifications* button
4. Highlight a Notification at the top
5. Click the *Define Rules* button and select the Notification criteria (only the *Download Premium Change* requires rules)
6. Select user(s) who will receive the Notification
7. Click *OK* to save changes and exit

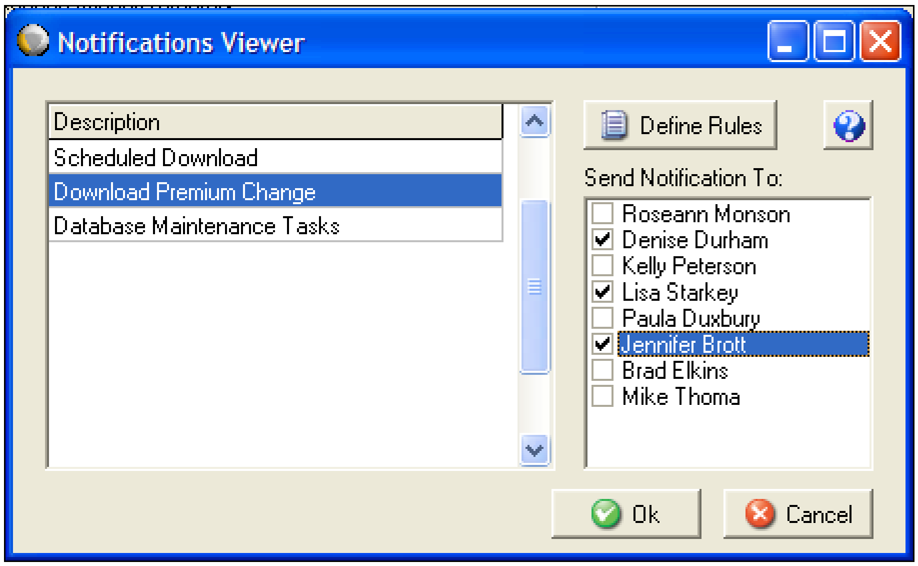


Figure 16: Notification Viewer

Notification Details

Scheduled Download

Agency must contact FSC Customer Service to have the Scheduled Download task set up in Windows.

Creates a notification when any of the following happens:

Transactions have been put into suspense during the scheduled task

The user processing the suspended transactions pauses the download

Download has an error when running as a scheduled task

The download processing completes

The user may launch the download process from the notification or view the Download Transaction and Download Error/Information reports.

Download Premium Change

Creates a Notification when the download has been completed. This Notification will deliver the same information as the Premium Change report. The user may click on the client name to open the Client screen or the policy number to open the policy.

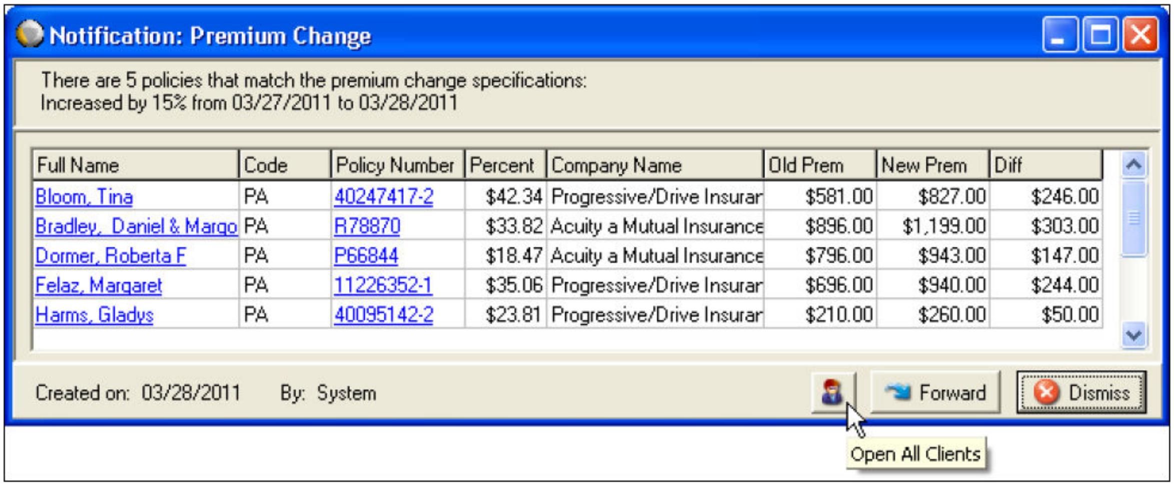


Figure 17: Premium Change Notification

Database Maintenance Tasks

Notification will take place the first time a user opens the system for the day if any of the following are true:

- It has been more than one day since the Backup Database task has been run
- It has been more than seven days since the Backup and Restore Database task has been run
- It has been more than seven days since the Pack Tables task has been run
- It has been more than one day since the Reorganize IMSdata task has been run

The Notification will contain a link for the user to open the Tasks area

Local Defaults

This tab stores information about each user's local setup for FSC Manager. This section will need to be done at each user's computer. The user should log into FSC Manager using their User Name.

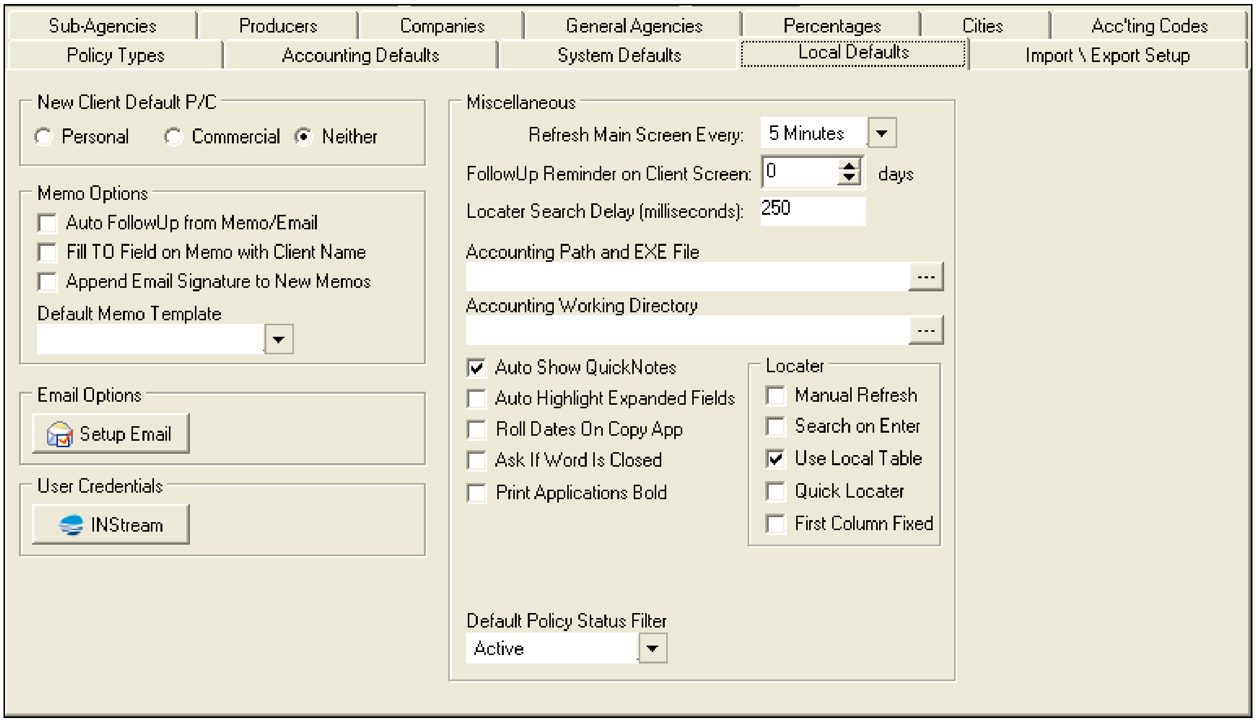


Figure 17: Local Defaults

Auto Fill Clients

Users may choose to have all new clients default to Personal or Commercial. If Neither is selected, the user will be prompted to choose Personal or Commercial each time a new client is added.

Memo Options

Auto Followup from Memo – when this option is checked, the system assumes that after a memo is closed, the user would like a Follow Up and pops the Follow Up screen.

Fill TO field on memo with client – when this option is checked, a memo will pre-fill the TO field of a memo with the client name and address.

Append Email Signature to New Memos - this option will allow the user to have their email signature pull into all new memos.

Email Options

FSC Manager works with a user's Outlook or Outlook Express email program. If not using the either of these programs, the user will have to provide SMTP server information during the email setup.

1. Click the *Setup Email* button.
2. Choose MAPI (if using Outlook or Outlook Express).
3. Enter SMTP server information if using an email program other than Outlook or Outlook Express.

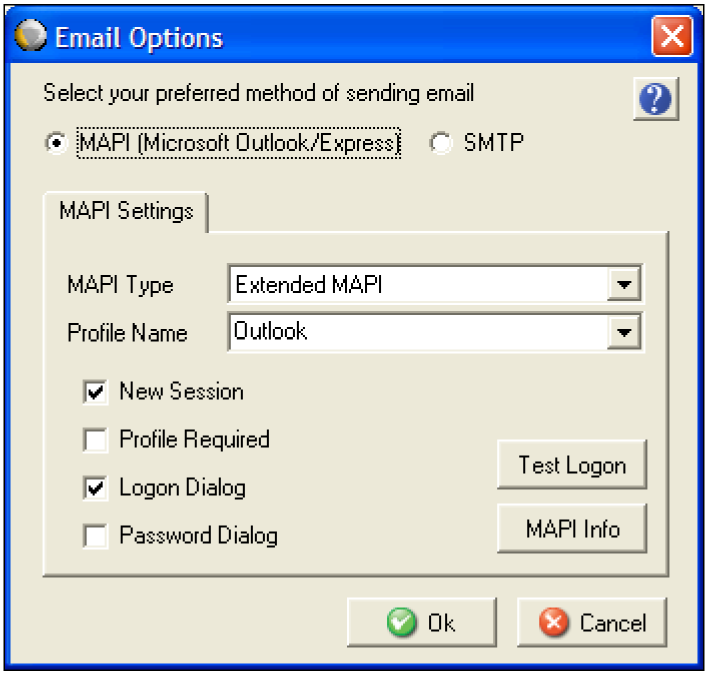


Figure 18: Email Setup Click *Next.*

4. Click *OK.*

Outlook Integration

FSC Manager will integrate directly with Outlook versions 2003, 2007 and 2010. The new email features will **not** function with Outlook Express or Windows Live Mail. If you are currently using an internet-based email program, talk with your hardware vendor to determine if it can be accessed via Outlook.

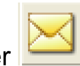
NOTE: If a user is operating FSC Manager in a Terminal Server or Citrix environment (e.g. ASP), Outlook must run from the Terminal Server/Citrix rather than locally on your desktop. Please work with your ASP or hardware vendor to implement Outlook in Terminal Server/Citrix before turning on the Outlook integration.

Recommended Setting: Set the message format in Outlook to HTML. (Tools->Options->Mail Format tab)

Turning on Outlook Email Integration (Must be completed once by each user)

1. Go to the System button on the Banner
2. Go to the *Local Defaults* tab
3. Click on the *Setup Email* button
4. In the *MAPI Type* field, select *Extended MAPI* and click *OK*

Sending Emails

When a user clicks the Email button in FSC Manager , the Outlook New Message screen will open. The user's default signature in Outlook will automatically populate in the email body.

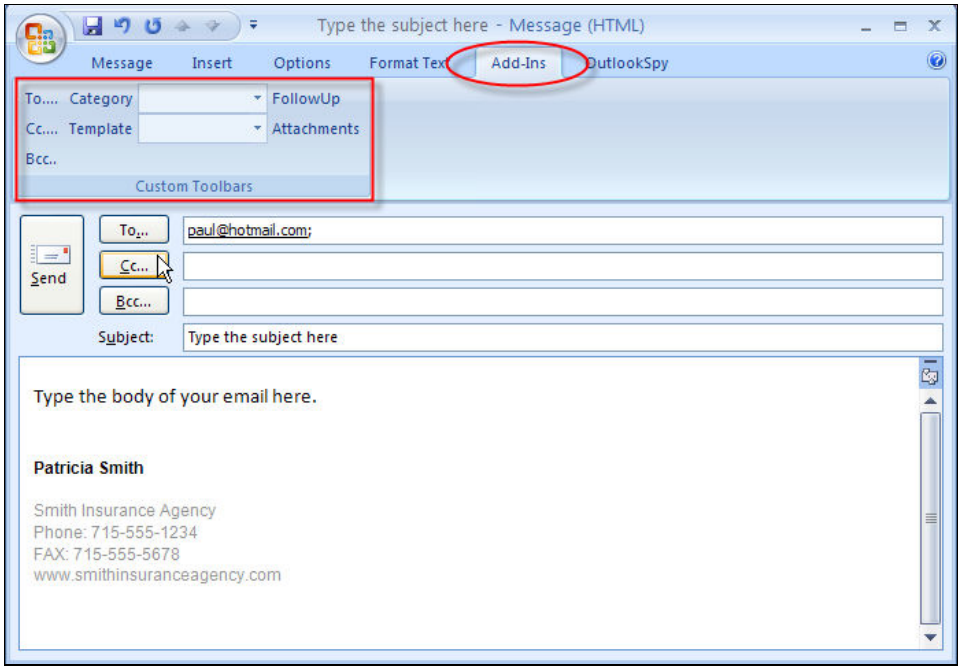


Figure 19: FSC Manager Add-In Buttons

A custom tool bar has been added to Outlook whenever an email is initiated from FSC Manager. Depending on the version of Outlook, the custom toolbar may appear in different places. In Outlook 2007 or 2010, the custom toolbar will appear on the Add-Ins tab (see above). In Outlook 2003, the toolbar will appear below the subject field of the email (see below). The custom toolbar integrates information from FSC Manager.

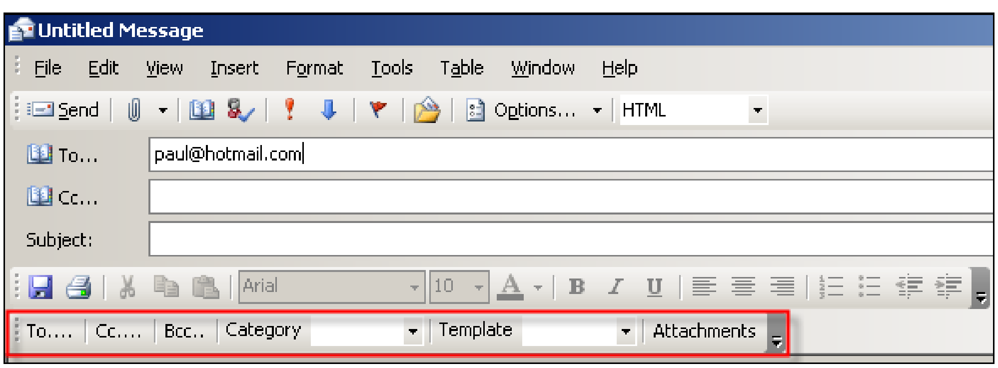


Figure 20: FSC Manager Add-In Buttons

Custom Add-In Buttons

To, Cc, or Bcc buttons - opens the Address Book Viewer in FSC Manager.

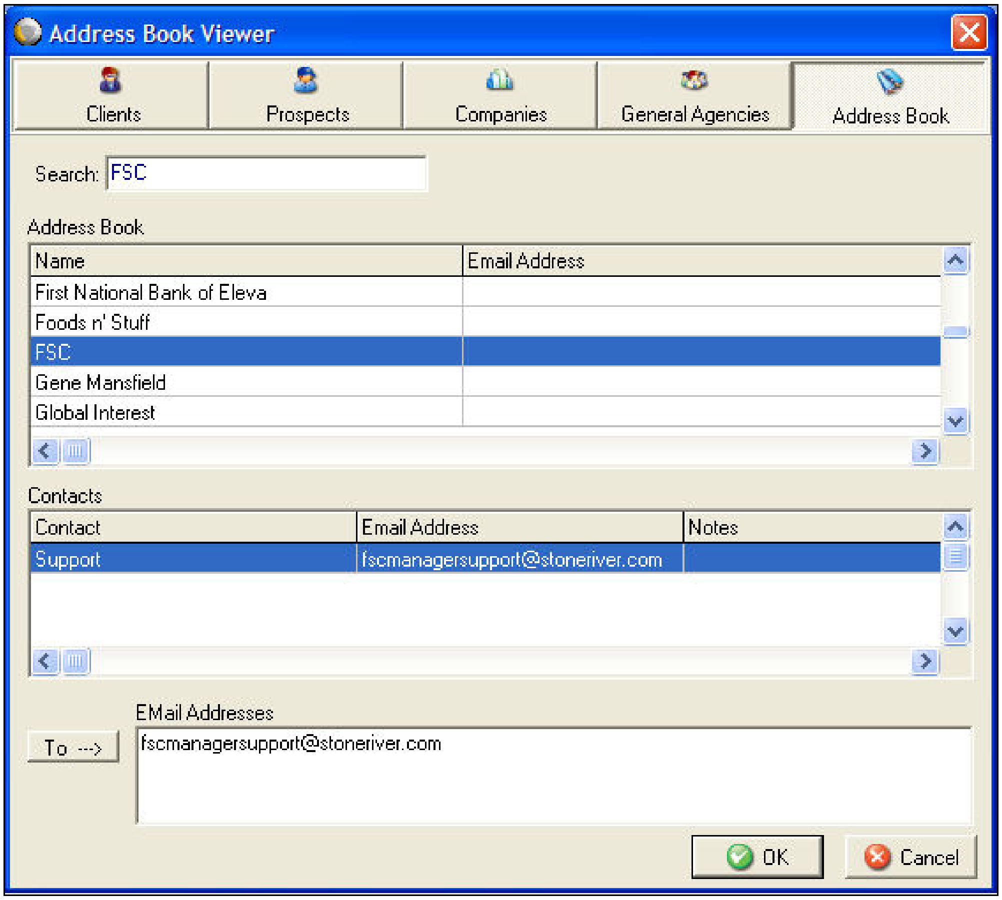


Figure 21: Address Book Viewer

Category button - select a Tranlog category for the email.

Template button - select a Memo Template that will merge information from the client and policy into the body of the email. The recommended workflow for emailing a memo is to open the Email first and select a Template from the email screen. ***Warning: If the user opens the Memo area and sends the email from the memo, two tranlogs will be created.*** When a memo template is inserted, it will remove the default signature. The email template may contain a signature or it can be inserted from Outlook.

FollowUp button – allows user to create a Follow-Up from the email. If the user has the System or Local Default turned called “Populate FollowUp with Memo/Email,” the FollowUp will be created automatically when the email is sent and the email text will appear in the Follow Up.

Attachments button - opens the Select Email Attachments screen.

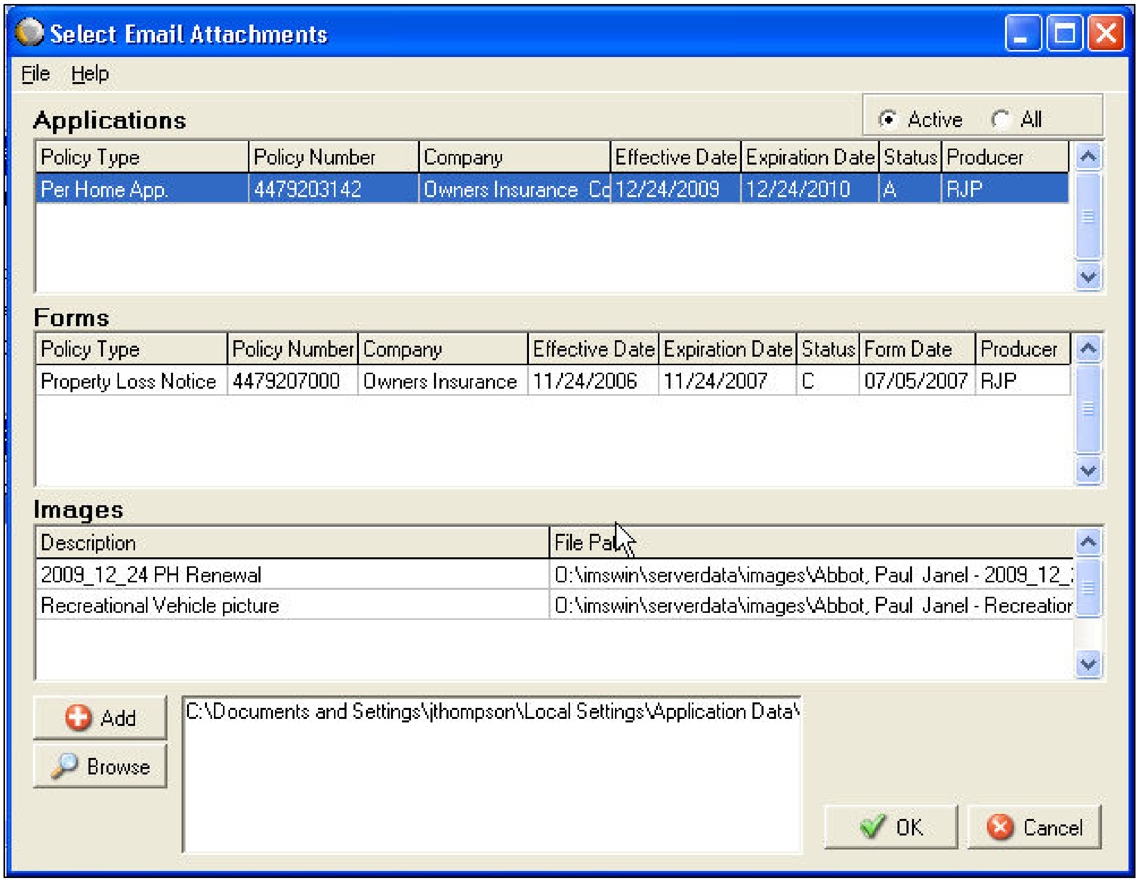


Figure 22: Select Attachments

Attachments may also be added by dragging and dropping to the email screen or by clicking on the *Attach File* button in Outlook and browsing in Windows explorer to find an attachment.

Emails sent from anywhere in FSC Manager will automatically record to the Tranlog. Emails sent from Outlook *outside* of FSC Manager will *not* record to the Tranlog.

Recording Incoming Emails to Tranlog

Drag an email from your Outlook Inbox; drop it on the Client or Imaging screen. The *Tranlog Appender* will open. The email header and body will record into the Tranlog. In the top area, the user may add additional comments that will append to the top of the saved Tranlog. If the email is dropped on a specific policy on the *Policies* tab, the Tranlog will include the policy number. Users may also select the policy number after the *Tranlog Appender* opens.

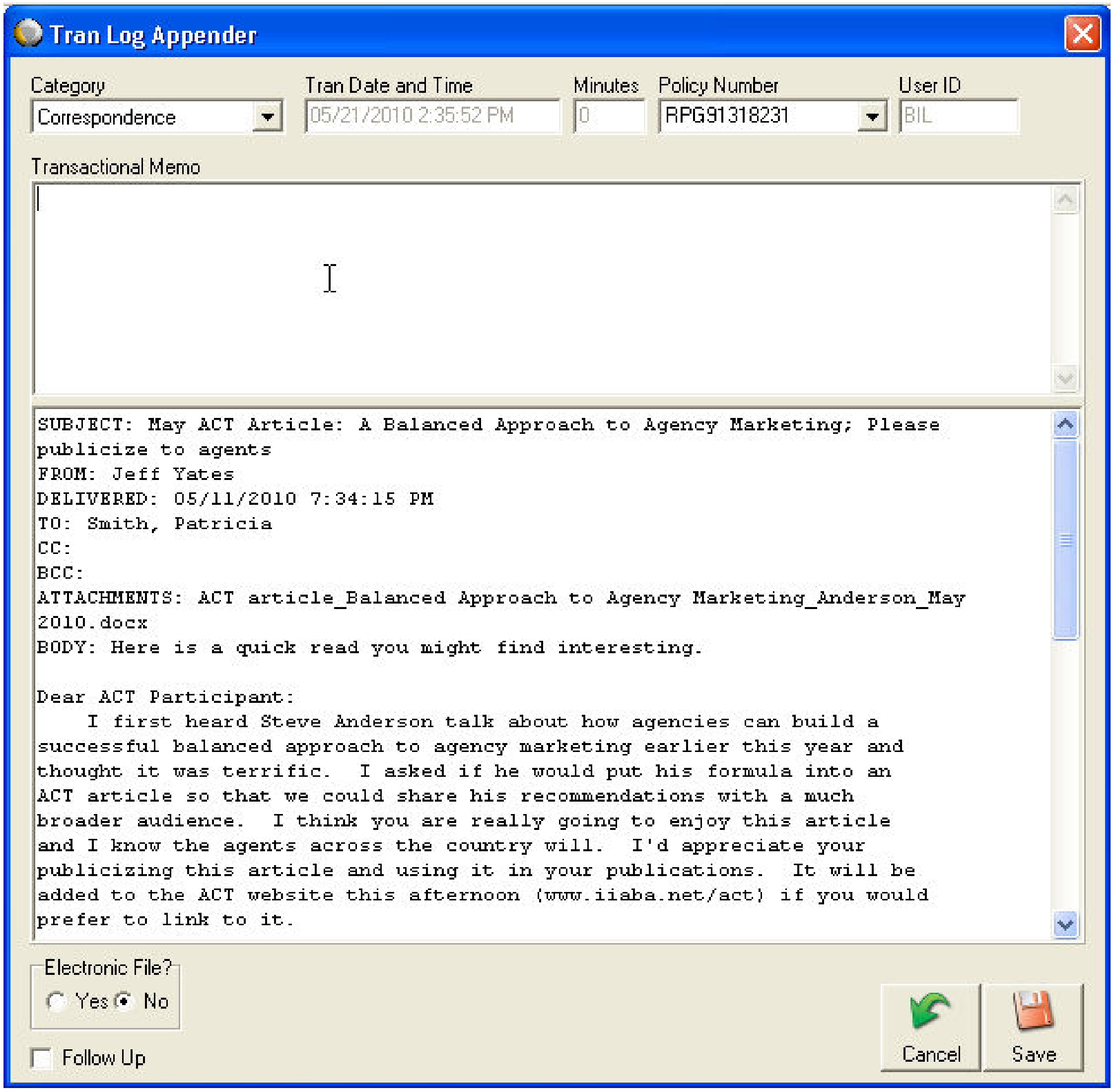


Figure 23: Tranlog Appender

If images are attached to the email, the user will be prompted with the question, "*Do you want to add the email attachments to imaging?*" Answering "*yes*" will start the normal attaching process directly from the Client screen instead of the Imaging screen. This is more convenient and efficient way to add the attachments from an email.

Email Using Simple MAPI/SMTP

For users ***not*** implementing the new Outlook integration, a plain text email signature can be set up to default into the current email screen. To set up the default signature:

1. Go to System button on the Banner

2. Go to the *Local Defaults* tab
3. Click on the *Setup Email* button
4. Click the *Signature* button
5. Enter your signature information. This is in plain text which means it does not support font styles, size, or formatting.
6. Click *OK* to save the signature
7. Click *OK* to exit the setup

Users may also determine if they want the email signature to default when emailing a memo. If the user would like this feature, in the *Local Defaults*, put a check mark in "*Append Email Signature to New Memos*."

Miscellaneous

Refresh Main Screen Every 5 Minutes – This default controls the refreshing of the Follow Up grid on the Main Screen. This area automatically updates at 5 minute intervals. Users can increase or decrease the interval.

Follow-Up Reminder on Client Screen ____ days – the Follow Up tab on the Client screen will turn yellow if a Follow Up is due with in the number of days specified. Leaving it at zero will make the tab turn yellow only if a Follow Up is past due.

Accounting Path and EXE File – this path should only be set on the user that does the accounting integration (optional). The path should point to the same exe that the accounting shortcut references.

Auto Show Quicknotes **(recommended)** – this option should be checked so that all Quick Notes which are similar to post-it notes on a Client screen automatically open when the client is opened.

Locater Manual Refresh – this option should only be turned on if the agency has large amounts of data and the Client locater is slow. Normally the locater will refresh each time the button is clicked. When this option is turned on, the locater will refresh the first time a user clicks on it each day. Throughout the rest of the day, the user would have to click the Refresh button to refresh the data.

Locater Search on Enter – this option should only be turned on if the agency has large amounts of data and the Client locater is slow. Normally, the locater searches after each character. When this option is turned on, the locater will not search until the user hits enter.

Roll Dates on Copy App – this features works with the Copy App button on the Client screen. If this option is enabled, the dates will roll forward one policy period. This is useful if a user generally copies an application for requoting purposes.

Ask if Word is Closed – this option needs to be enabled if Microsoft Word locks up when a Single Letter or Marketing Letter is closed. This option will prevent the lockup. It is not needed on all computers.

Print applications Bold – this option will make the application data print bold.

Import\Export Setup

This tab contains the setup for importing and exporting data to the various raters. Currently, FSC Manager can integrate with FSC Rater, FSC Rater RT, MI Rater and Quomation Power Quote.

For information on setting this up, please refer to the chapter on Rater Integration. Usually the setup will be completed by the trainer or a Customer Service technician.

Security Settings

If the agency would like to set a tab in the System area to be viewed by only a certain level user this can be accomplished by the following.

1. With the System area open be on the tab to setup and press Alt + F7.

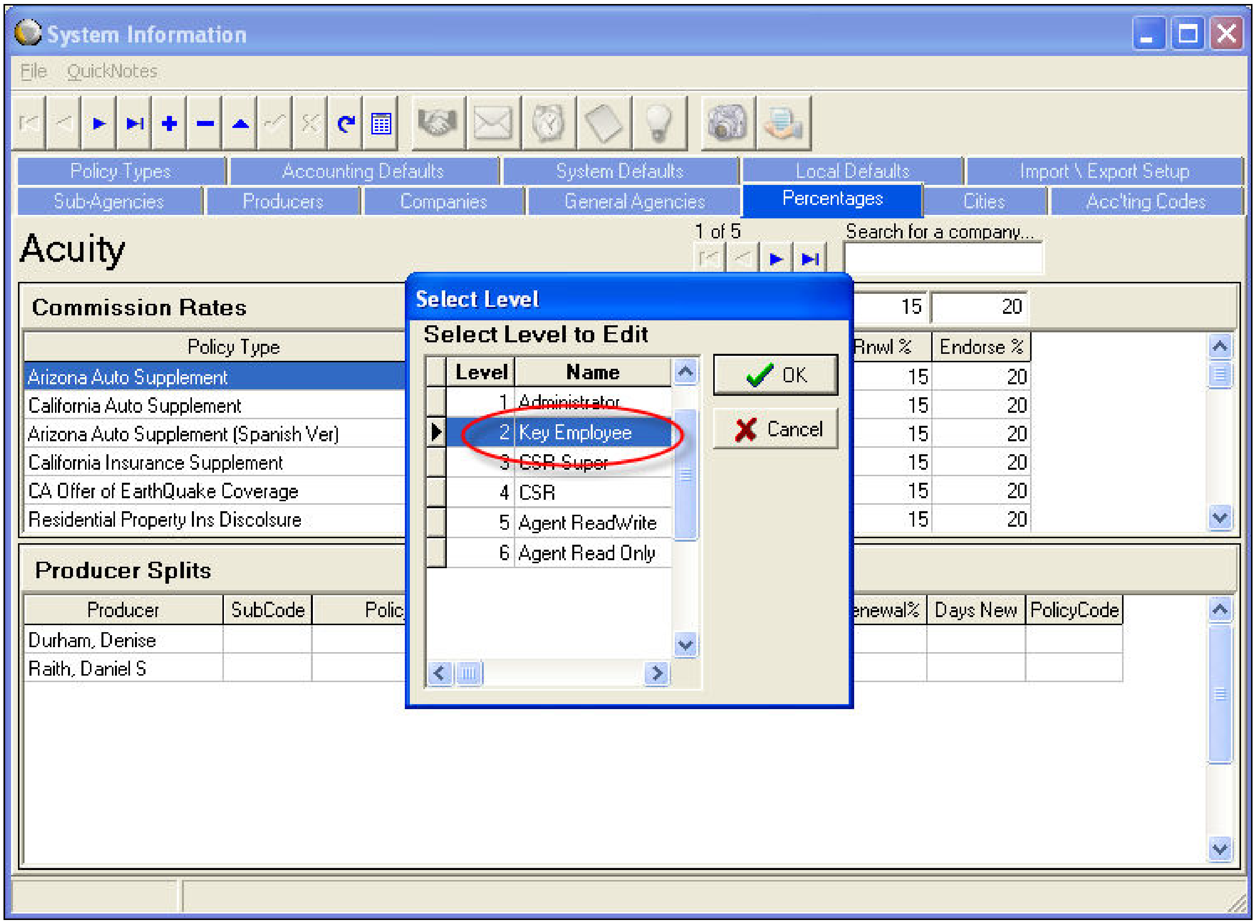


Figure 24: Security Setup

2. Select the user level to be modified.
3. Click *OK* to open Security HotKeys box.

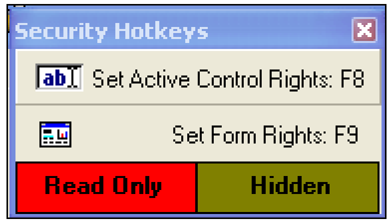


Figure 25: Security Hotkeys

4. Select either *Read Only* (user level will be able to view but not change) or *Hidden* (this tab will not open for the user level you have selected).
5. Repeat these steps for each user level to be modified.

Security for Life, Health, and Financial Products

The purpose of Health Insurance Portability and Accountability Act of 1996 (HIPAA) was to address the security and privacy of health related data. With this in mind, FSC has developed a feature to limit private information to licensed individuals. The system administrator will determine which policy types related to life, health and securities (financial products) can be secured. The administrator will also determine which users are licensed in each of these areas and therefore granted full access to all information regarding these products. The security will extend to the Applications, Tranlogs, Follow-ups, Memos, and Images. Non-licensed personnel cannot access secure information.

These new security features are not required; however, this feature allows agencies dealing with life, health or securities to restrict information to licensed users.

Setup

1. Assign the Security Administrator
   a. Go to the *System* button on the Banner
   b. On the *System Defaults* tab, select a user from the drop down list for the *Security Administrator* field

   NOTE: Only the Security Administrator may change this field once it has been set.

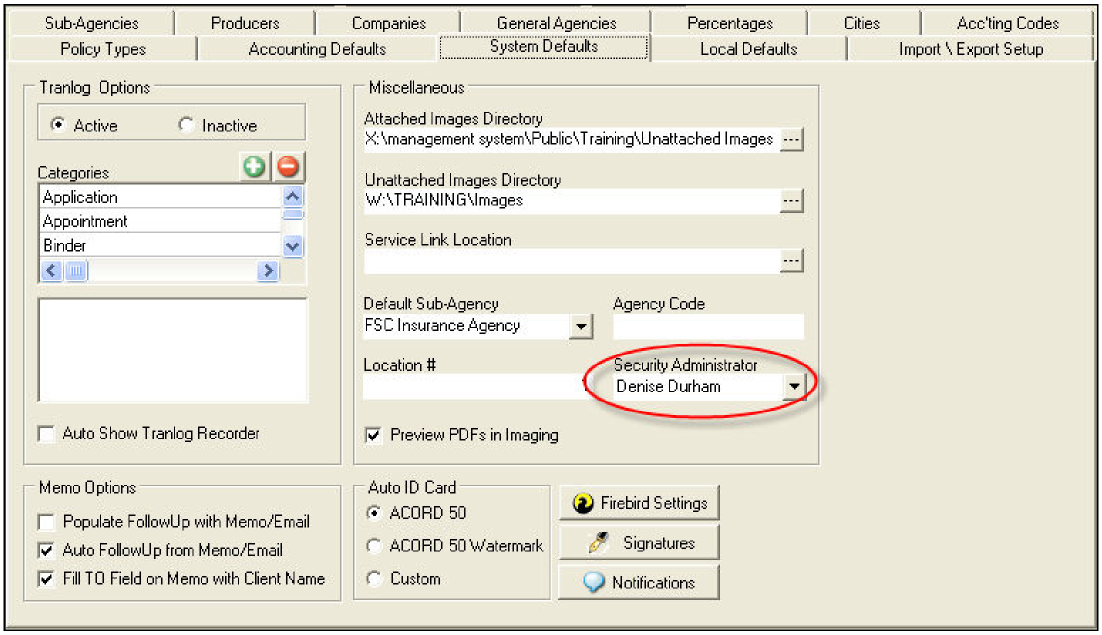
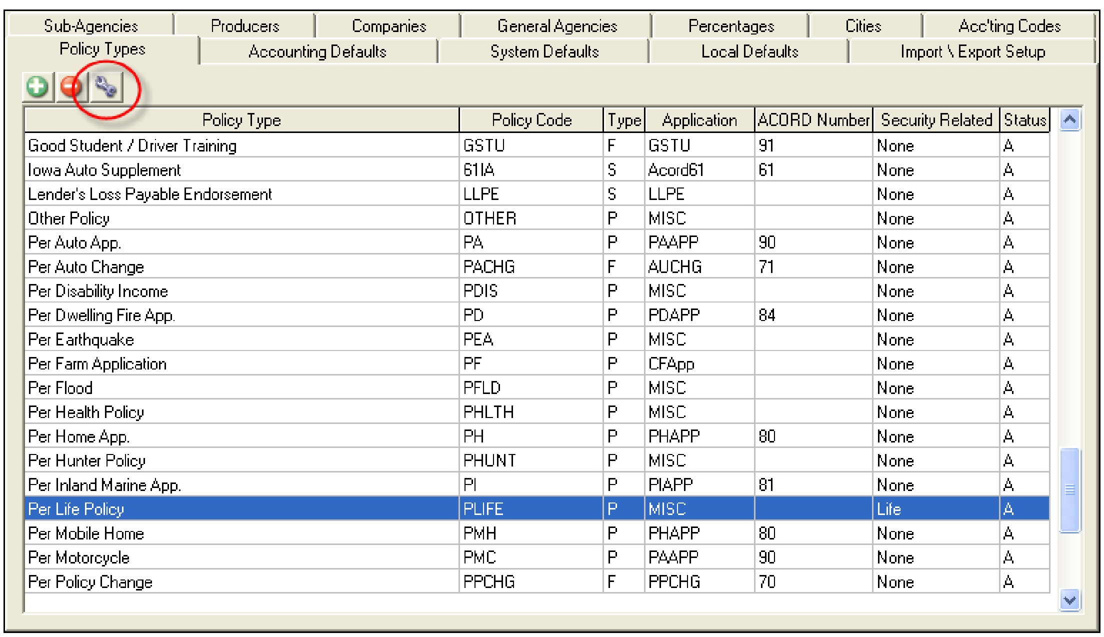


Figure 26: Security Administrator

2. Categorize the policy types as life, health or securities for privacy protection.
   a. Go to the *System* button on the Banner
   b. Go to the *Policy Types* tab
   c. Highlight a policy type and click the *Edit* button



Policy Type	Policy Code	Type	Application	ACORD Number	Security Related	Status
Good Student / Driver Training	GSTU	F	GSTU	91	None	A
Iowa Auto Supplement	61IA	S	Acord61	61	None	A
Lender's Loss Payable Endorsement	LLPE	S	LLPE		None	A
Other Policy	OTHER	P	MISC		None	A
Per Auto App.	PA	P	PAAPP	90	None	A
Per Auto Change	PACHG	F	AUCHG	71	None	A
Per Disability Income	PDIS	P	MISC		None	A
Per Dwelling Fire App.	PD	P	PDAPP	84	None	A
Per Earthquake	PEA	P	MISC		None	A
Per Farm Application	PF	P	CFApp		None	A
Per Flood	PFLD	P	MISC		None	A
Per Health Policy	PHLTH	P	MISC		None	A
Per Home App.	PH	P	PHAPP	80	None	A
Per Hunter Policy	PHUNT	P	MISC		None	A
Per Inland Marine App.	PI	P	PIAPP	81	None	A
Per Life Policy	PLIFE	P	MISC		Life	A
Per Mobile Home	PMH	P	PHAPP	80	None	A
Per Motorcycle	PMC	P	PAAPP	90	None	A
Per Policy Change	PPCHG	F	PPCHG	70	None	A

Figure 27: Policy Types

d. Select a *Security Setting* and click *OK*

e. Repeat this for each policy type to protect

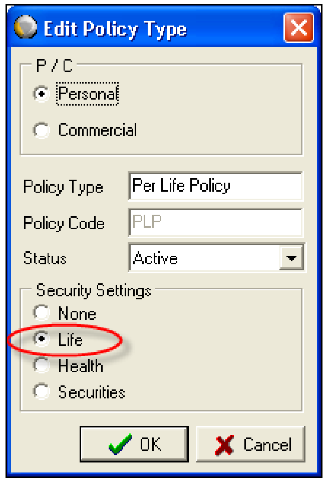


Figure 28: Categorize Policy Types

3. Determine each user’s licensing

    a. Exit FSC Manager

    b. At the Login, go to *Admin Utilities*

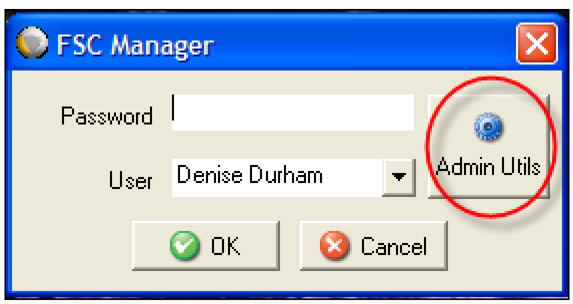


Figure 29: Login

    c. Highlight a user and click the *Edit User* button

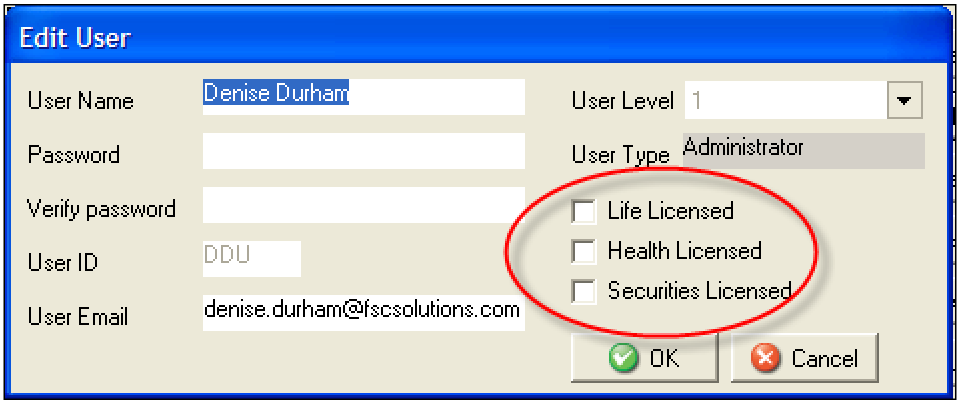


Figure 30: Assign User Licensing

d. Put a check mark in the areas that the user is licensed. A user may be licensed for multiple areas.

e. Repeat this step for each user that is licensed

Security for Licensed Users

As a licensed user, all Tranlogs, Follow-ups, Memos and Images related to a secured policy type will be marked as secure by default with this icon . When this icon is red , the item is secure. When the icon is gray , the item is not secure.

Tranlogs, Follow-ups, Memos and Images related to a secured policy type created in the following ways will be secured by default:

- Create the Tranlog, Follow-up or Memo directly from the policy screen
- On the Client screen, highlight the policy before creating the Tranlog, Follow-up or Memo
- On a Memo or Follow-up initiated from the Client screen or Main screen, use the *Policy Select* button
- Attach the image from the policy screen
- Attach the image from the Main screen at an App level

In addition to the above defaults, at any time, a licensed user may manually secure a Tranlog, Follow-up, Memo or Image by clicking the *Secure* icon which changes to red. If the user is licensed in multiple products, they will be prompted to select a product. Licensed users may also remove security from an item by clicking the *Secure* icon which changes to gray.

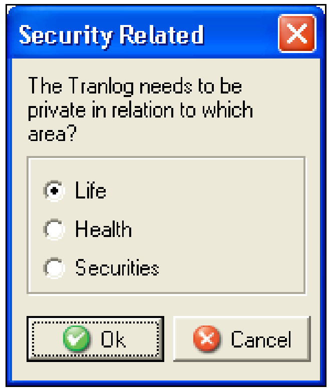


Figure 31: Securing a Tranlog, Memo, Follow-up or Image

In Imaging, licensed individuals will have a new user option. Open Imaging and go to *Options->Imaging Options->User Options* tab. The new option is called "*Always prompt for security when attaching an image"*. Because many users attach all images directly from the Client screen, meaning they are not linked to a policy, this option will prompt the user to assign life, health or securities settings to every image they attach. This is generally recommended if the user spends the majority of his/her time doing life, health or securities related work. The user can also assign security manually after attaching each image.

Secure Follow-ups may only be directed to users that are licensed in the appropriate product.

The Tranlog created by emailing from the Client screen is **not** secure because the email is not linked to a policy. The Tranlog created by the email may be made secure manually after the email is sent by going to the Tranlog and clicking on the Secure icon.

Security for Non-Licensed Users

Non-licensed users cannot create secure Applications, Tranlogs, Follow-ups, Memos and Images.

Once Policies have been secured, non-licensed users cannot:

- Open, print or copy secured policies
- Access secure policies through the *Apps* button on the Banner
- Create additional secure policies

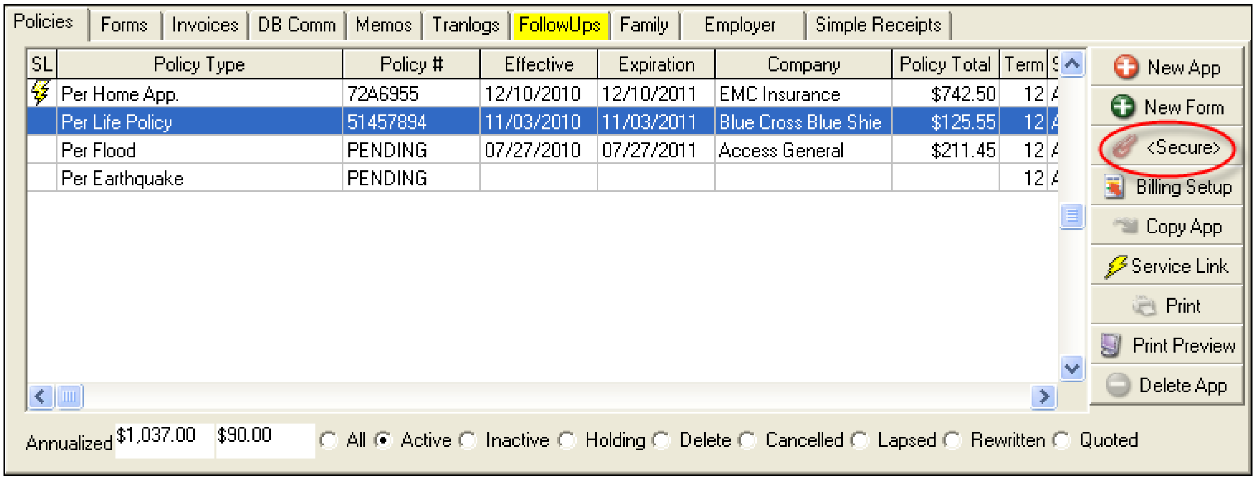


Figure 32: Secure Policies

Once Tranlogs have been secured, non-licensed users cannot:

- » Open or print a secure Tranlog
- » View content of secure Tranlogs on the Tranlog Reports

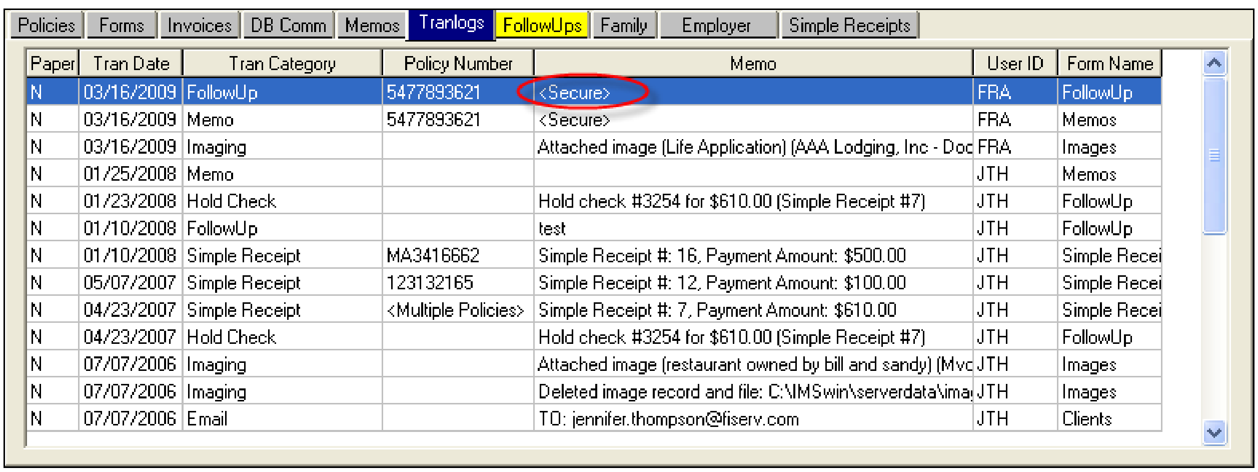


Figure 33: Secure Tranlogs

Once Follow-ups have been secured, non-licensed users cannot:

- » Open or print a secure Follow-up
- » View content of secure Follow-ups on the Follow-up Report

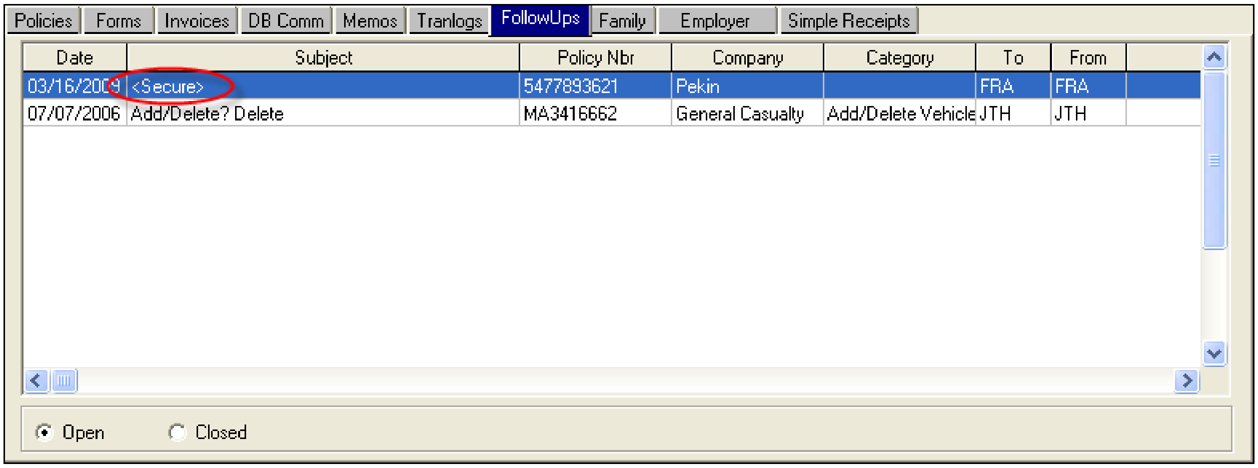


Figure 34: Secure Follow-ups

Once Images have been secured, non-licensed users cannot:

» View, print or email secure Images

» Delete, un-attach or re-categorize secure Images

Note: Secure images are encrypted on the hard drive.

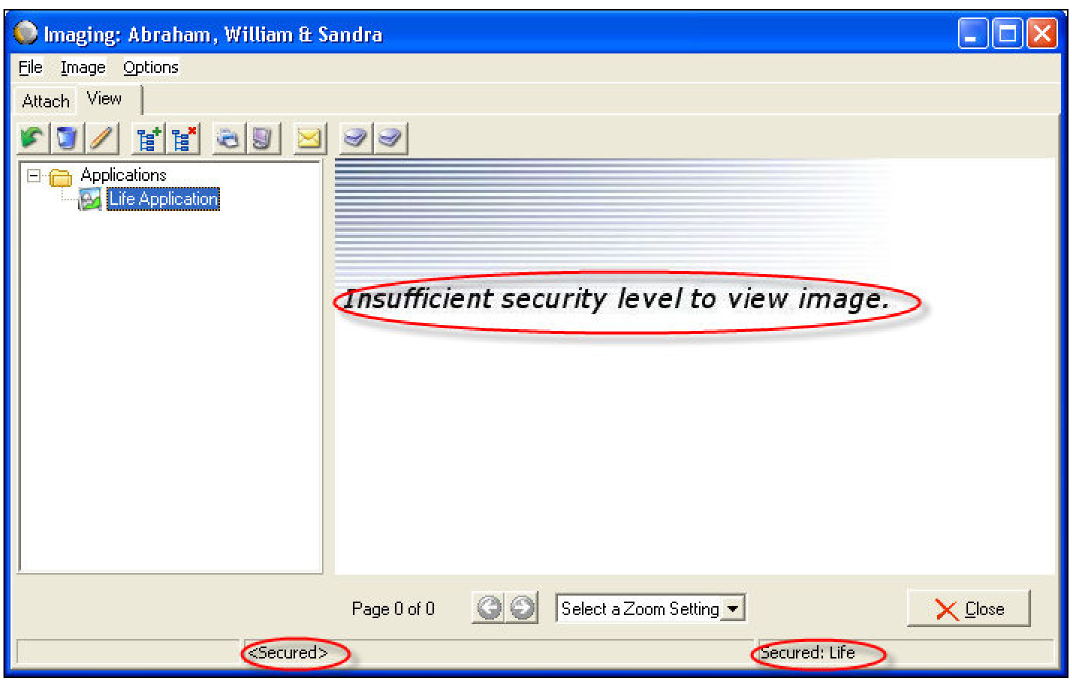


Figure 35: Secure Images

Running Updates

FSC will release anywhere from 1-3 updates to the Manager per year. The user will be notified that an update is available via email. Once the user has received the email they will need to update the system to insure they are using the most current version of FSC Manager.

1. Click *Help* on the FSC Manager banner.

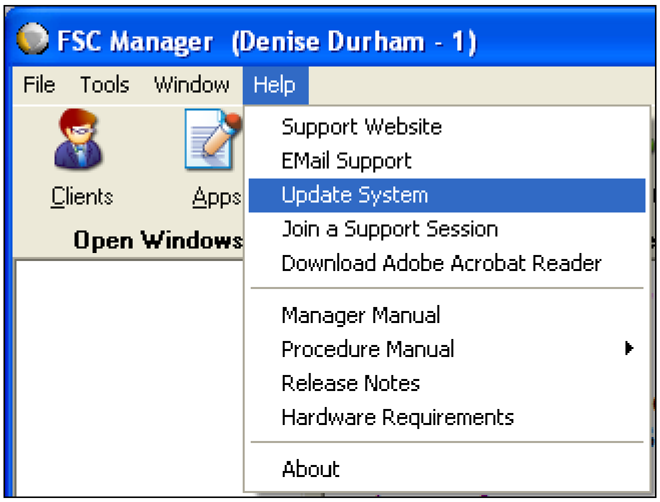


Figure 36: FSC Manager Update

2. Click *Update System* to start the update.
3. When the update is complete the user will be asked to confirm the update.

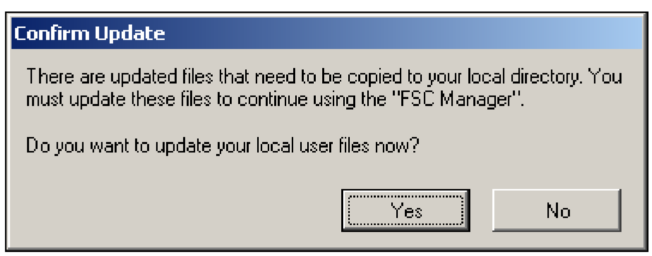


Figure 37: Confirm Update of Files

4. The user must click *Yes* to update files and continue into FSC Manager.

Address Book

FSC Manager contains an Address Book that integrates with Email, Letters and Marketing. Users can add frequently used contacts to the Address Book, to eliminate having to type in the data each time it is used.

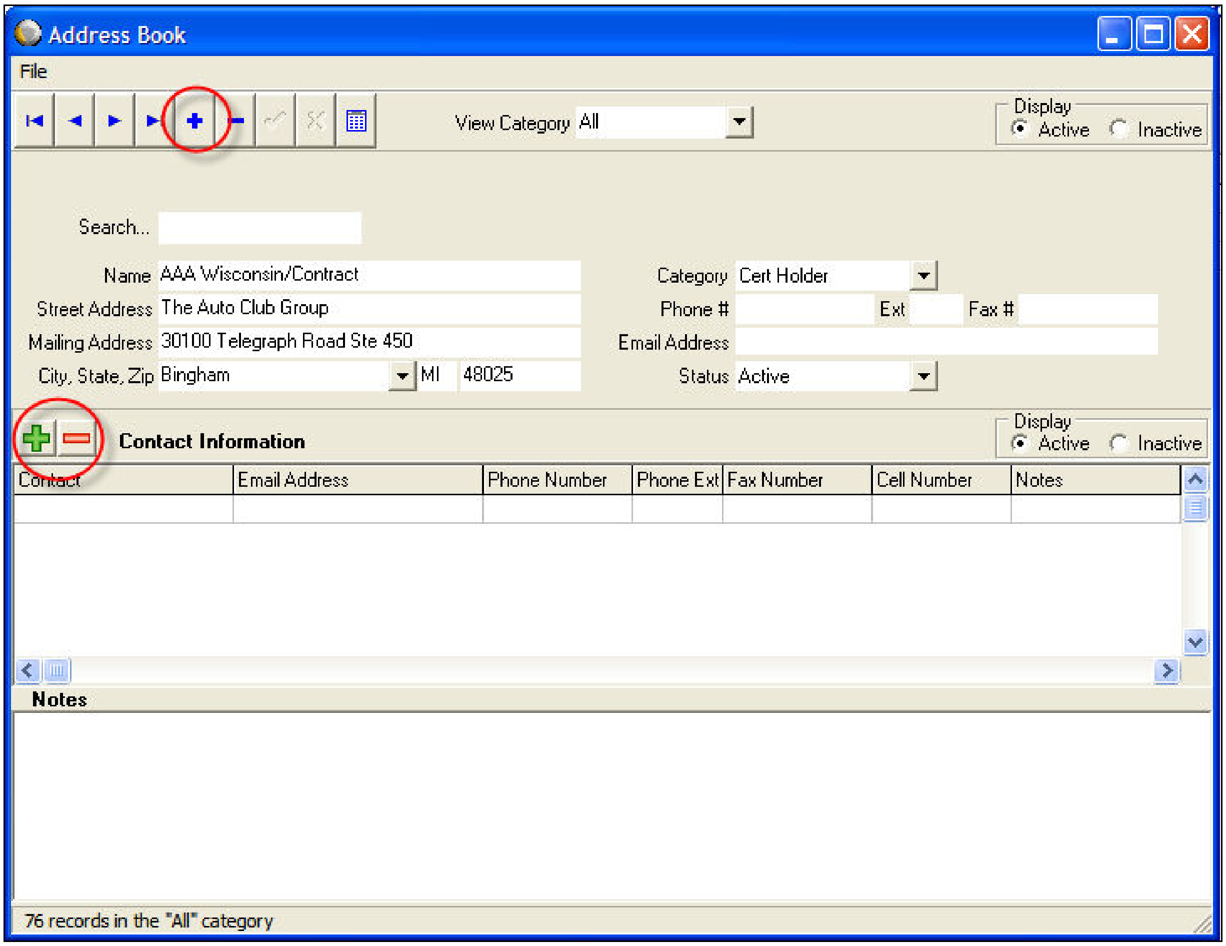


Figure 38: Address Book

To add a new Address Book entry click the blue plus button at the top of the screen. To add a new contact for an existing entry use the plus and minus buttons in the middle left of the screen.

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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