



# **FSC Manager**

» **Communications**

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## Introduction

Communications is utilized for mass communicating with customers via email, letter, or developing a spreadsheet for a call list or outside Marketing firm. It is easy to use and allows the agency to locate groups of clients that should receive the communication. The Manager can isolate cross-selling opportunities such as: clients who have an auto policy but no homeowners, homeowners but no auto, or no umbrella. It will also allow agencies to communicate with customers about important issues such as a book roll, annual insurance reviews, new producers, and products being offered by the agency.

This chapter will review how to create a communication item and filter for the group of clients that should receive the communication.

## Communications

Click the Communications icon on the Banner to access this area.



Figure 1: Communications

- » **Email** - send a quick and easy email that blind carbon copies all recipients (this method can have attachments)
- » **Personalized Email** - send individual emails with the recipient's data merged into the email (this option requires Outlook)
- » **Letter** – send a letter to clients and/or prospects
- » **Spreadsheet** – create a spreadsheet of client and/or prospect information
- » **Envelopes/Labels** – print envelopes or label

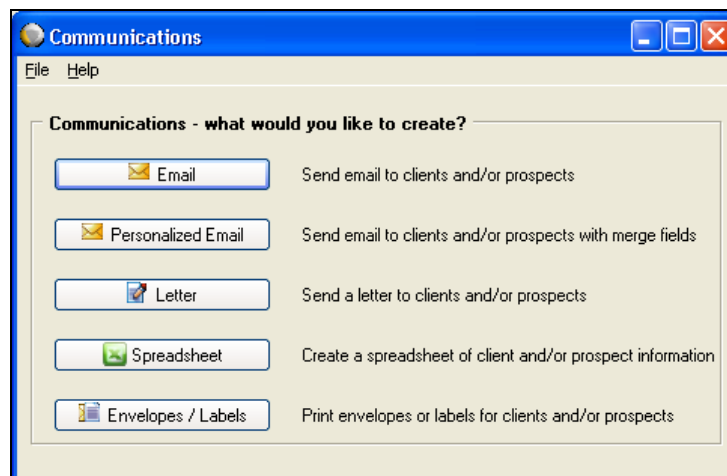
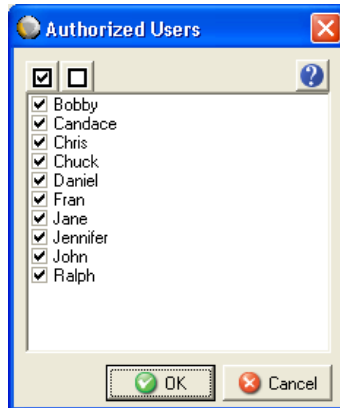


Figure 2: Communications

**Common Concepts**

**Security**

Communications will be available to all users until a Level 1 user sets security on the area. Security is determined per user. A user either has access to Communications or does not have access. To set security, at the Communications screen, click Tools->Set Communications Security. Uncheck the users who should not have access to Communications.

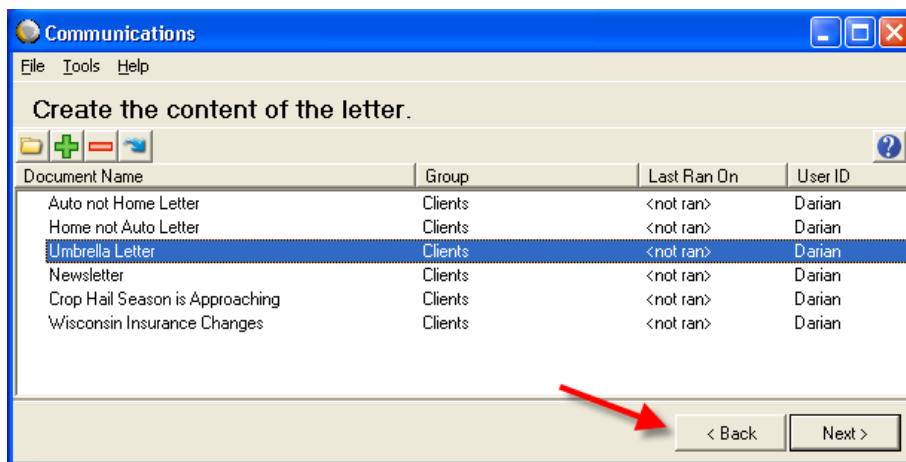


**Figure 3: Communications Security**

Step one for using Communications, determine which method to use: Personalized Email, BCC Email, Letter, Spreadsheet or Envelopes/Mailing Labels. There are several concepts that are similar or exactly the same across all types of communications. A description of these common concepts follows.

**It's a Wizard**

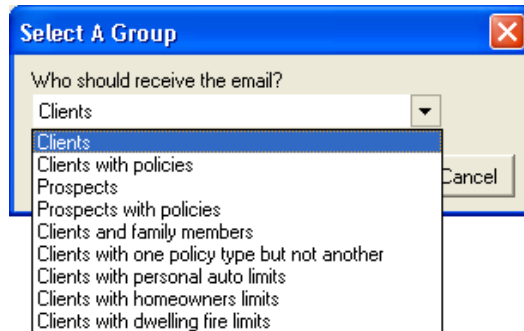
Once a document or spreadsheet has been created, the Communications follows a wizard format. The user navigates through the process using Next or Back buttons in the lower right corner of each screen.



**Figure 4: Navigation Buttons**

## Filter Groups

In all methods, the user must select a filter group. The filter group determines the fields that will be available to narrow down the group of clients/prospects who will receive the communication.



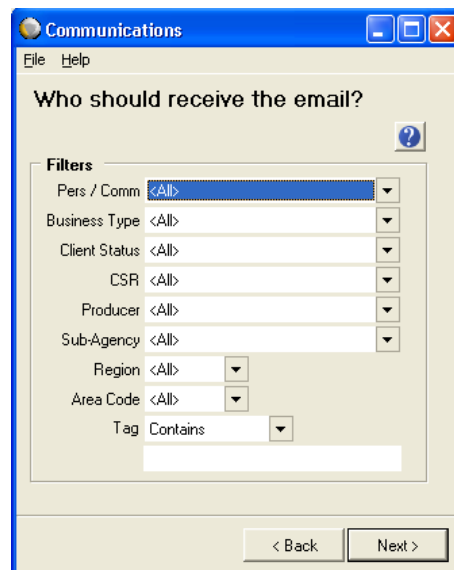
**Figure 5: Select a Filter Group**

Below are the filters that will be available when each group is selected.

### Clients

Used when trying to locate groups of clients.

- » Select <custom> to filter on more than one value
- » For Regions or Area Codes, select the type of Region or Phone Number first. A value list will be created. Select the appropriate options.
- » The Tag field from the clients is a miscellaneous searchable field. First select "Contains", "Does Not Contain" and then enter a value. The user also has options of "Empty" or "Not Empty."

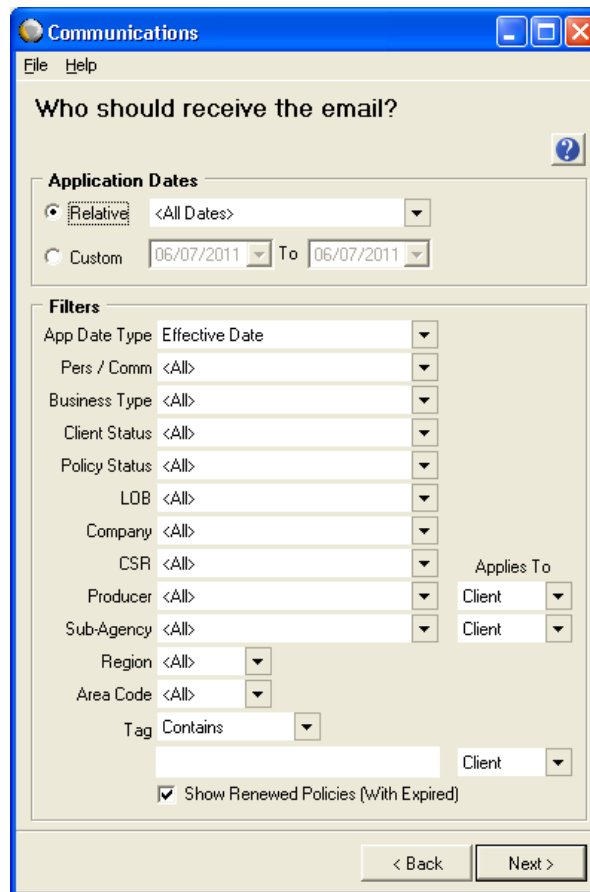


**Figure 6: Clients Filters**

**Clients with Policies**

Used to locate clients with specific policy types, expiration dates or lines of business.

- » Select <custom> to filter on more than one value
- » Before selecting a date filter, determine the correct App Date Type: Effective Date, Expiration Date, Issued Date, and Cancelled Date.
- » Some values could pull from multiple areas. The Producer, Sub-Agency and Tag could search at the Client level or the Policy level. Determine which level for these filters.
- » For Regions or Area Codes, select the type of Region or Phone Number first. A value list will be created. Select the appropriate options.
- » The Tag field from the clients is a miscellaneous searchable field. First select "Contains", "Does Not Contain" and then enter a value. The user also has options of "Empty" or "Not Empty."
- » "Show Renewed Policies" means that the system will query policies that are due to expire in this date range as well as policies that have effective dates in the same range indicating they were already renewed.



The screenshot shows a software window titled "Communications" with a menu bar containing "File" and "Help". The main heading is "Who should receive the email?". Below this, there are two main sections: "Application Dates" and "Filters".

**Application Dates:** This section has two radio buttons. The "Relative" button is selected, with a dropdown menu showing "<All Dates>". The "Custom" button is unselected, with two date input fields: "06/07/2011" and "To 06/07/2011".

**Filters:** This section contains a list of dropdown menus for various criteria:
 

- App Date Type: Effective Date
- Pers / Comm: <All>
- Business Type: <All>
- Client Status: <All>
- Policy Status: <All>
- LOB: <All>
- Company: <All>
- CSR: <All>
- Producer: <All> (with an "Applies To" dropdown set to "Client")
- Sub-Agency: <All> (with an "Applies To" dropdown set to "Client")
- Region: <All>
- Area Code: <All>
- Tag: Contains (with a text input field and an "Applies To" dropdown set to "Client")

 At the bottom of the filters section, there is a checked checkbox labeled "Show Renewed Policies (With Expired)".

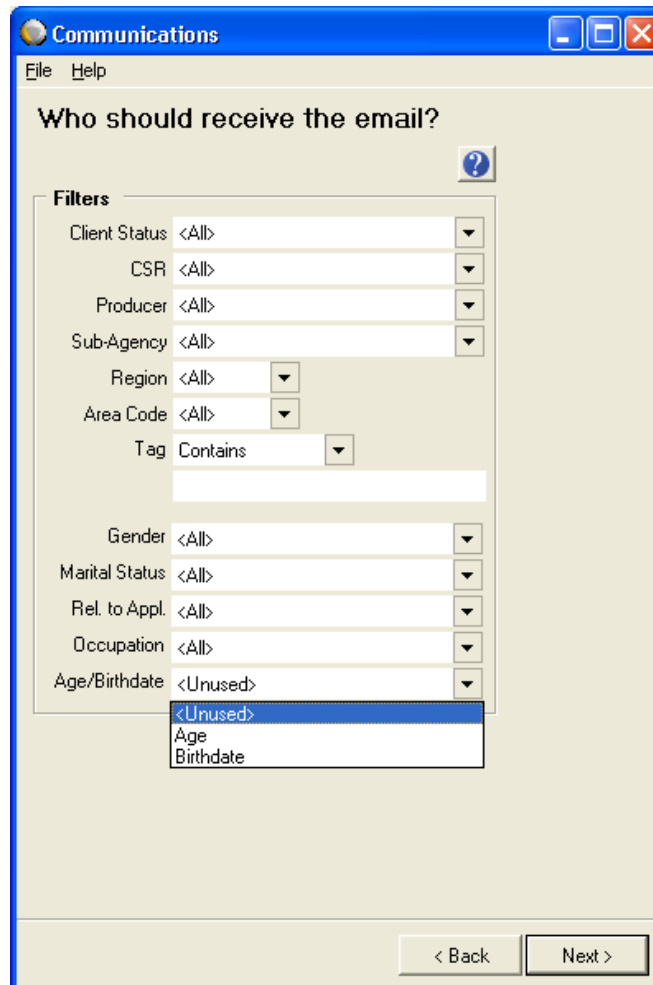
At the bottom of the window, there are two buttons: "< Back" and "Next >".

**Figure 7: Clients with Policies Filters**

**Clients and Family Members**

Locates clients with family members of a specific gender, marital status, age range or month of birth.

- » Select <custom> to filter on more than one value
- » For Regions or Area Codes, select the type of Region or Phone Number first. A value list will be created. Select the appropriate options.
- » The Tag field from the clients is a miscellaneous searchable field. First select "Contains", "Does Not Contain" and then enter a value. The user also has options of "Empty" or "Not Empty."
- » Under Age/Birthdate, select one of the options. Age allows the user to filter on a specific age or age range for all family members. Birthdate allows the user to filter on family members with birthdays in a specific month.

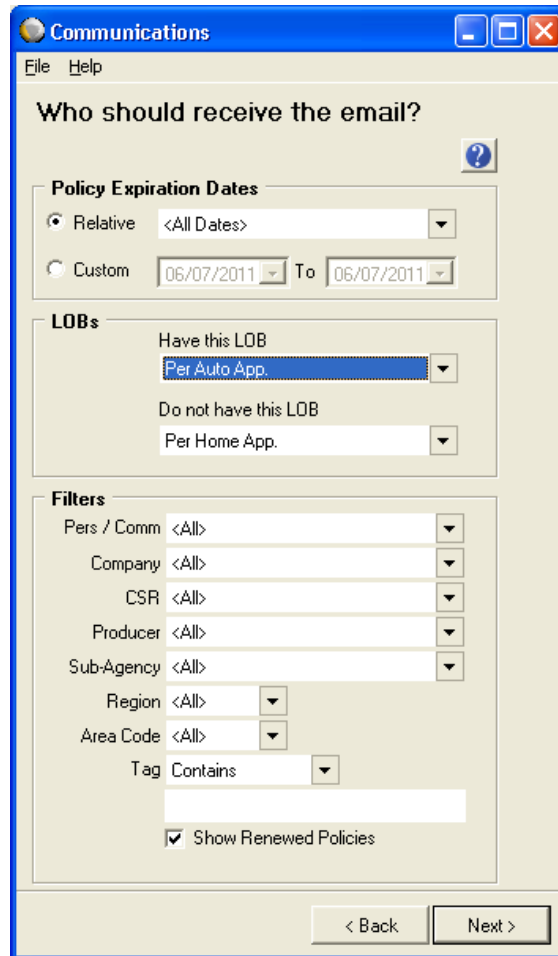


**Figure 8: Clients with Family Members Filters**

**Clients with One Policy Type but not Another**

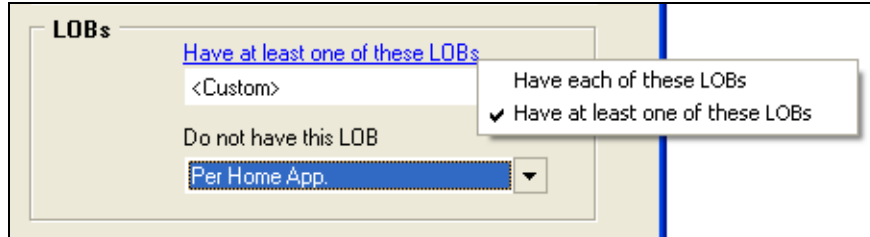
Cross references active policy types on active clients for cross selling opportunities

- » Select <custom> to filter on more than one value
- » In LOBs, select a line of business that the user has or does not have. When the user selects <custom> and chooses more than one line of business, the labels will become blue and underlined.
- » For Regions or Area Codes, select the type of Region or Phone Number first. A value list will be created. Select the appropriate options.
- » The Tag field from the clients is a miscellaneous searchable field. First select "Contains", "Does Not Contain" and then enter a value. The user also has options of "Empty" or "Not Empty."
- » "Show Renewed Policies" means that the system will query policies that are due to expire in this date range as well as policies that have effective dates in the same range indicating they were already renewed.



**Figure 9: Clients with One Policy Type but not Another**

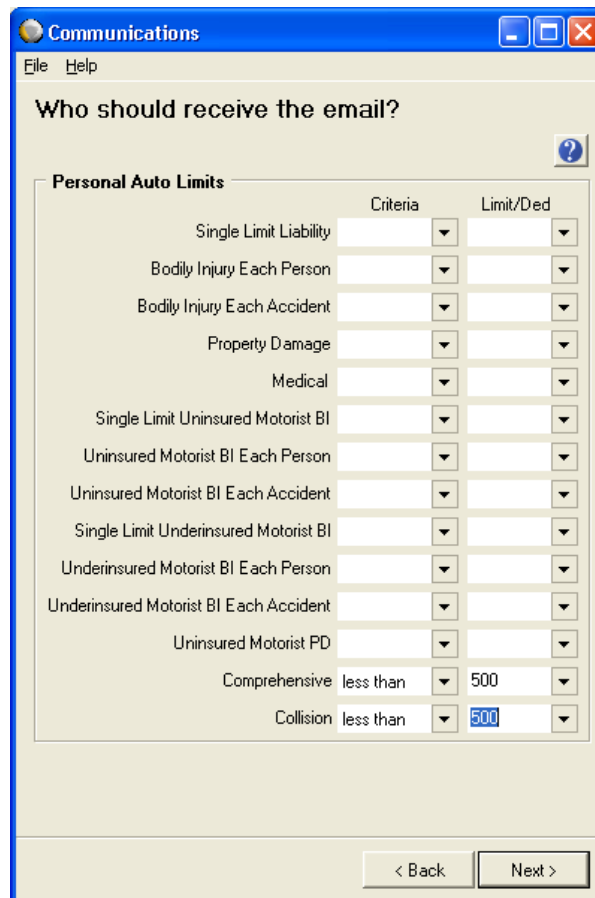
Selecting Custom in the LOB (Line of Business) area allows the user to multi-select policy types. When policy types are multi-selected, the user can right-click on the hyperlink above custom and select one of the following: Have at least one of these LOBs or Have each of these LOBs.



**Figure 10: Line of Business Filters**

**Clients with Personal Auto Limits/Home Limits/Dwelling Fire Limits**

Search the database for high or low limits/deductibles. There will be two filter screens. The first will contain the client and general policy filters. The next filter will display limits and deductible filters for the line of business selected.

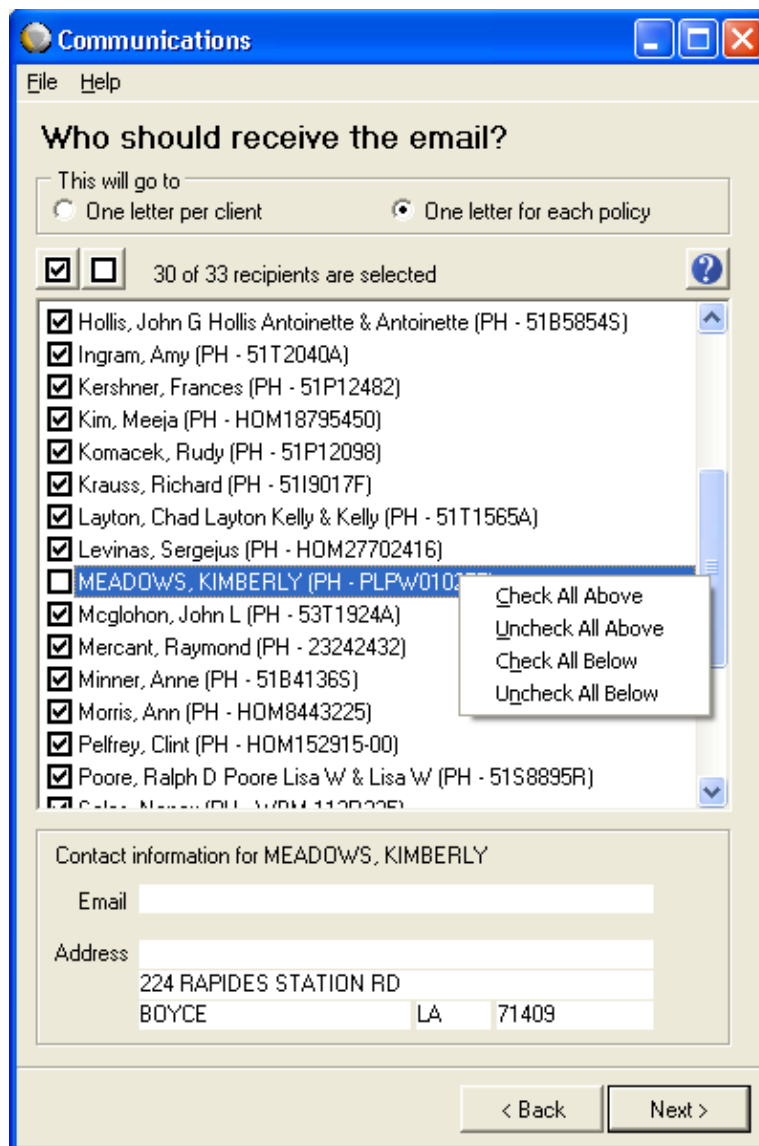


**Figure 11: Coverage Limits**

## Recipients

Once filters are selected, the user will proceed to a screen displaying the clients or prospects that meet the criteria. In some instances, the same name may appear multiple times because the client has multiple policies that meet the criteria. The user can determine whether the client should receive one communication or multiple communications for each policy.

The recipients that have valid email or mailing addresses will automatically be checked. If the email or mailing address is not valid, the client will not be checked. To see the recipients address, highlight the record and view the information at the bottom of the screen. The user may check or uncheck recipients as needed. If the user highlights a recipient and then right clicks, a menu option will appear allowing the user to: check all above, uncheck all above, check all below or uncheck all below.



**Figure 12: Recipients**

## Options

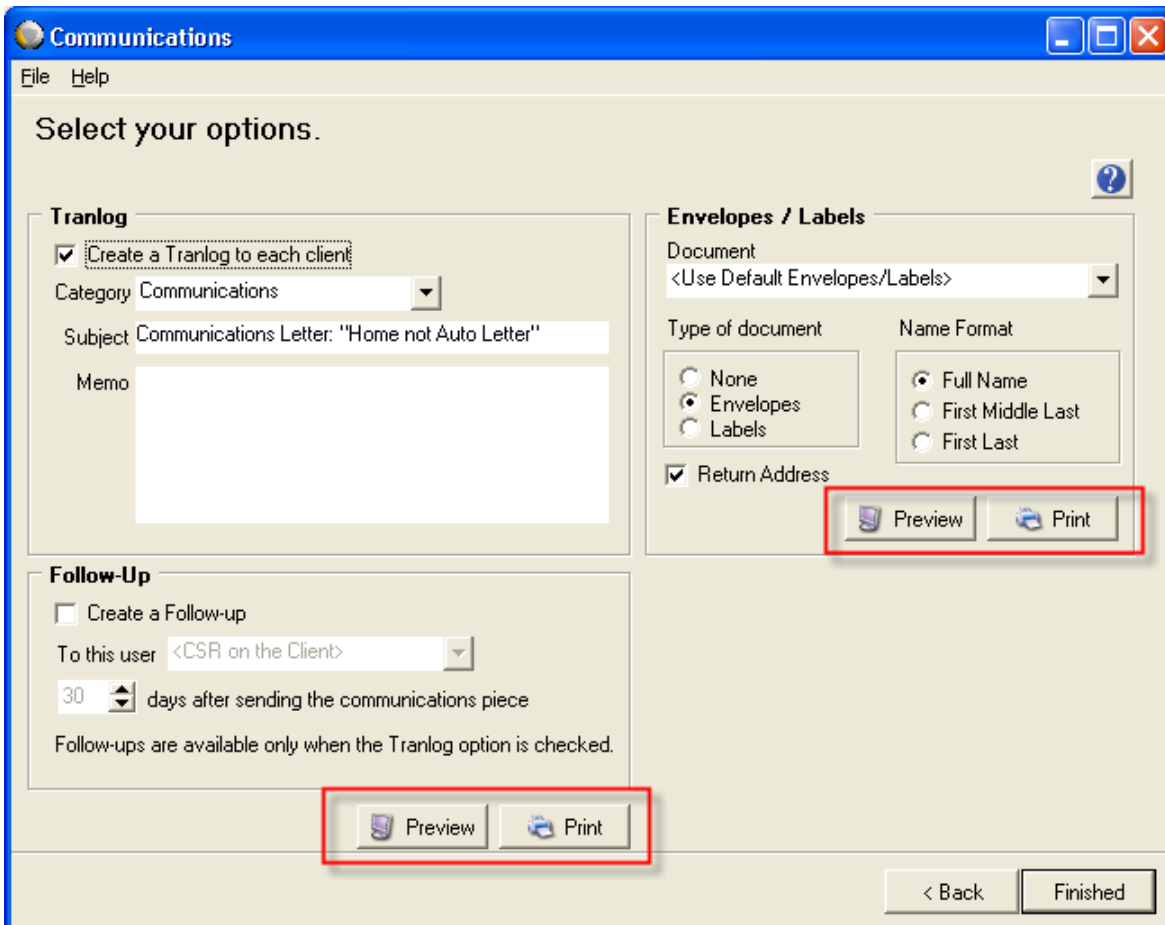
### Tranlog

If this option is checked, a Tranlog will be created when the communication is sent or printed. The Tranlog will note the date and time, and the name of the document that was sent. The user may also type additional information in the Memo area which will record in the Tranlog. The Tranlog will default to a category of Communications, but the user may change the category.

### Follow-ups

If this option is checked, a separate Follow-up will be created for each communication that was sent or printed. The Follow-ups can be directed to a specific individual in the agency or to the CSR assigned to the account. Select the Follow-up date by adjusting the “days after sending the marketing piece.”

**Note:** When sending an email, printing a document or creating a spreadsheet, the processing time will take longer the more records there are. Part of the processing time includes inserting the Tranlogs and Follow-ups. Sending 500 emails will be much faster than sending 5000 emails that are all recording to the Tranlog and Follow-Up. It may be prudent to send or print records in smaller groups.



The screenshot shows a window titled "Communications" with a menu bar containing "File" and "Help". The main content area is titled "Select your options." and contains three main sections:

- Tranlog:**
  - Create a Tranlog to each client
  - Category:
  - Subject:
  - Memo:
- Envelopes / Labels:**
  - Document:
  - Type of document:
    - None
    - Envelopes
    - Labels
  - Name Format:
    - Full Name
    - First Middle Last
    - First Last
  - Return Address
  - Buttons:
- Follow-Up:**
  - Create a Follow-up
  - To this user:
  - days after sending the communications piece
  - Follow-ups are available only when the Tranlog option is checked.
  - Buttons:

At the bottom right of the window are buttons for "< Back" and "Finished".

**Figure 13: Options**

The Options screen is where the user can preview their letter or email and send the email or print the document. Letters will have one additional option that no other communication types have: Envelopes/Labels. After the user has printed a letter, they may immediately print envelopes or labels for the same group of individuals. If the user has <Use Default Envelopes/Labels> selected, they simply choose their options in the boxes below. The user could use a custom envelope or label that they designed in Envelopes/Labels area of Communications. Below are step by step instructions for each communication type.

## Email

1. Determine who will receive the correspondence
  - a. Select a Filter Group and click OK.
  - b. Select the filters to define the group of clients that will receive the email and click Next
  - c. A list of clients/prospects that meet the criteria will display. Uncheck any recipients that should not receive the email and click Next.
2. Select Options
  - a. Determine if a Tranlog and/or Follow-Up will take place when sending the email
3. Create and send the email
  - a. Click the Email button
  - b. The email screen will open with all of the recipients listed in the bcc (blind carbon copy) field.
  - c. Type the email and send. Please note that the email cannot be saved as a draft and sent later if the user wishes to create the Tranlog. The email needs to be sent from the Communications screen.

## Personalized Email

This email will utilize a Microsoft Word Mail Merge document. Users can insert client-specific information into the body of the document via merge fields. This method will only work with Outlook.

1. Create a document
  - a. Click + to add a new email document
  - b. Give the document a name, select a filter group and click OK
  - c. Microsoft Word will open. Type the content of the email and insert merge fields when necessary. Insert the email signature into the document as well.
  - d. Close Word and save changes
2. Determine who will receive the correspondence
  - a. At the list of documents, click Next
  - b. Select the filters to define the group of clients that will receive the email and click Next

- c. A list of clients/prospects that meet the criteria will display. If using a client with policies filter group, determine if one email will be sent per client or one email sent per policy.
    - d. Uncheck any recipients that should not receive the email and click Next.
  3. Select Options
    - a. Enter a Subject for the email
    - b. Determine if a Tranlog and/or Follow-Up will take place when sending the email
  4. Send the email
    - a. Preview the email – enter an email address and click OK. A sample of the email will be sent to this address.
    - b. Click the Email button – this will begin sending out individual emails to each of the recipients.
    - c. When the system is done sending the emails, a message will appear that says, “Marketing job is complete.”

## Letter

These are Microsoft Word Mail Merge documents.

1. Create a document
  - a. Click + to add a new document
  - b. Give the document a name, select a filter group, select a template and click OK. A template is a base document that contains information that should be the same on all letters (e.g. margins, fonts, letterhead, etc).
  - c. Microsoft Word will open. Type the content of the letter and insert merge fields when necessary.
  - d. Close Word and save changes
2. Determine who will receive the correspondence
  - a. At the list of documents, click Next
  - b. Select the filters to define the group of clients that will receive the letter and click Next
  - c. A list of clients/prospects that meet the criteria will display. If using a client with policies filter group, determine if one letter will be sent per client or one letter sent per policy.
  - d. Uncheck any recipients that should not receive the letter and click Next.
3. Select Options
  - a. Determine if a Tranlog and/or Follow-Up will take place when sending the letter
  - b. Envelopes/Mailing Labels
    - i. Use the default envelopes/ mailing labels or a custom envelope/ mailing label that the user designed

- ii. If using the defaults, select an option for the following:
  1. Envelopes or Mailing Labels
  2. Name Format
  3. Return Address
4. Print the Letter/Envelopes/Mailing Labels
  - a. Preview the email letter, envelopes or mailing labels
  - b. Click the Print button for the letter
  - c. Click the Print button for the envelopes or labels
  - d. When the system is done printing the letters and envelopes or labels, a message will appear that says, "Marketing job is complete"

### **Letter Templates**

Templates are documents that the agency can make or modify so that all correspondence has the same look (e.g. margins, font style, size, spacing, merge fields). Two templates are available by default: Personal Lines Letterhead and Commercial Lines Letterhead. The difference between the two is the name field. The personal lines uses first, middle and last name. The commercial lines uses the full name.

To create, delete or modify a template:

1. Click on Communications on the Banner
2. Select Letter
3. Go to the menu Setup->Templates
4. Use the + to add a new template, - to delete a template, or simply double click on the name of an existing template to modify it
5. Microsoft Word will open. Set up the template.
6. Close and save

### **Spreadsheets**

1. Define the export specifications
  - a. Click + to add a spreadsheet export
  - b. Give the spreadsheet export a name, select a filter group, and select the fields that will export to Excel and click OK
2. Determine what information will show on the spreadsheet
  - a. At the list of spreadsheet exports, click Next
  - b. Select the filters to define the information that will show on the spreadsheet and click Next



**3. Select Options**

- a. Determine if a Tranlog and/or Follow-Up will take place when creating the spreadsheet

## 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](mailto:fscmanagersupport@fscsolutions.com)

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