



FSC Manager

» Locaters



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Introduction

The locater allows users to search through data in a particular area and isolate either individual records or groups of records that the user wishes to retrieve. The areas in the Manager that have a locater are Clients, Apps, Billing Setup, Invoices, Memos and Receipts. Locaters are also used to isolate a group of clients when creating a custom report or marketing piece.

This chapter will demonstrate how to retrieve information, execute mass changes, customize the locater and create simple reports.

Locaters

Clients Locater

All locaters have the same features. The Clients Locater is used in the example below. The simplest usage of a locater is to find an individual client record and open that record. This is accomplished by typing in the client’s name (usually last name, first name), highlighting the record and clicking OK.

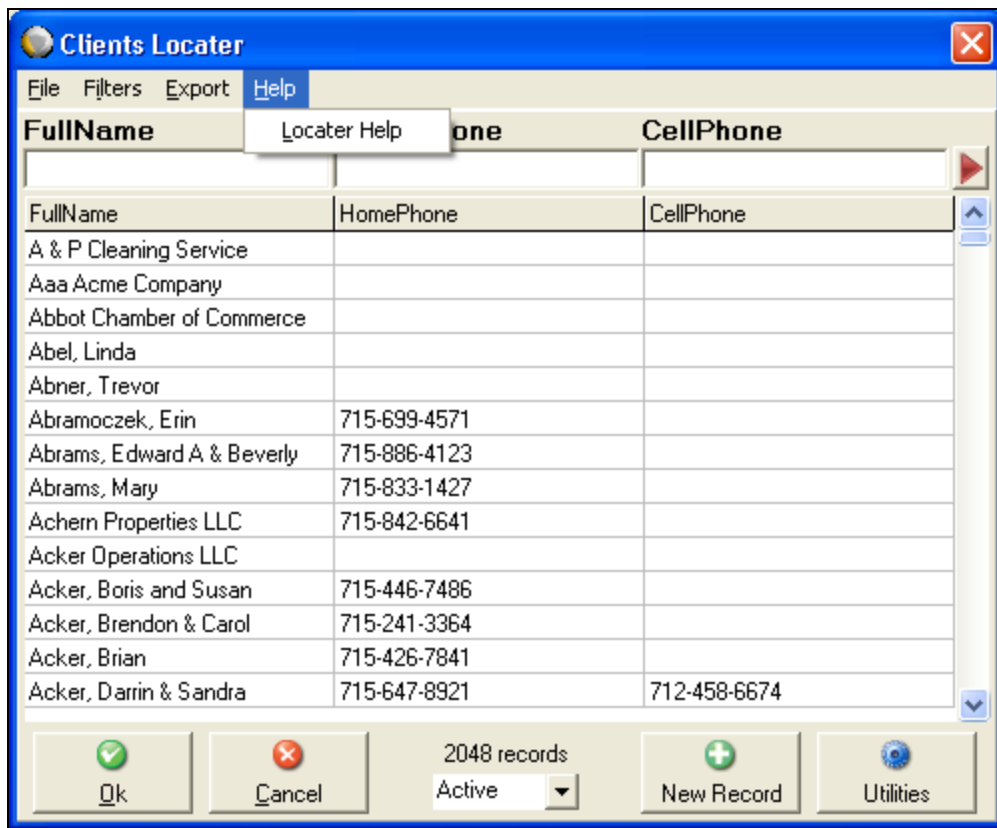


Figure 1: Clients Locater

HINT: If a client can not be located, try the following things:

1. Check the status at the bottom center of the locater, it may be set to view only *Active* clients, use the drop down arrow to change the status.
2. If the user has Manual Refresh turned on, the user can hit the F5 button on the keyboard to refresh the locater or use the menu option: *File* → *Refresh*.
3. Search for the client using the wild card and part of the client's name. The wild card is .. (Example: ..roberta) This will locate anyone in the system with the name Roberta whether it is at the beginning, middle or end of the fullname field.
4. Go to the *Apps* button on the Banner. Select the type of policy and click *OK*. Search on policy number. The policy may have been added to the wrong client in the system.

Locater Menu Options

File → *Exit* Allows the user to *Exit* the locater.

Filters

Load - Load a previously saved filter. If a field has been deleted in *Modify Setup*, a warning will appear that the field can't be found. That is not a problem. This field won't be available unless it is added again in the *Modify Setup*.

Save – Allows users to save a filter that may be used again. If the user wants to save a specific retrieval, click *Filter* → *Save* and enter a name for the filter.

Export → *Excel* **Note: Only available to Level 1 users.** All information in the locater will export into an Excel spreadsheet.

Help → *Locator Help* Opens this document.

Status Dropdown– Limits the list of records based on the “Status Options”

Active

Inactive

Holding

Delete

Prospect

Everything

Example: If the user selects *Active* under the Client Locator it will bring up only those clients that have the *Status* field set to *Active*.

OK – Selecting OK will process the filter (retrieve) specified and open up the first record in the retrieve. At this point, use the Records Navigator to move back and forth through the records..

Cancel – Selecting Cancel will close the Locator.

2048 Records (Active) – In the center of the bottom of the Locator window, the locater displays the number of records that match the filters used.

New Record – This button allows users to manually add a new record. Only the following locaters allow users to add new records: Clients, Receipts and Memos.

Utilities – This button allows the user to modify records in the locater. Make sure that the records are selected (meaning highlighted) before clicking on the *Utilities* button. If no records are highlighted, the system will assume that the user wishes to modify all records displayed in the locater. Once a utility option is selected, click *OK* to process or *Cancel* to exit.

- » *Active* - Change records to Active status.
- » *Inactive* - Change records to Inactive status.
- » *Delete* - Permanently delete records from the locater.
- » *Field to Change* – Select a field to mass update.
- » *Change Value to* - Enter a value to mass update the field selected in *Field to Change*.
- » *Prospects* - Access an old area of the system. This area will not be developed any further. We do not recommend using this area in the future. Prospects should be entered in the Client Locater and assigned a status of *Prospect*.

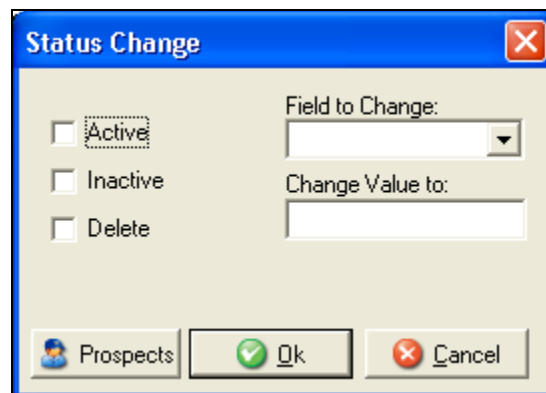


Figure 2: Utilities

How to Filter (Retrieve) Information

The locaters allow users to select a record to open or define a group of information used in a report or marketing piece. A user may search on any field in the locater and may use a variety of retrievals to find the record or group of records. Below are examples of different types of retrievals that can be used in a locater.

To Filter:	Type In:	Results will find:
All Records that start with Brown	Brown	Brown, John; Brown, Susan; Brown and Smith Co.
All Records that contain "Jim"	..Jim	Brown, Jim; Smith, Jim; Cricket, Jiminey
All Records that contain Brown or J	..Brown:..J	Doe, Sue and Brown, Tim; Mojo, Bob
All Records except Brown	/Brown	Any record that does not start with Brown
All Records that this field is blank	=	Field is empty
All Records that this field is not blank	/=	Field is not empty
All Records after Brown	>Brown	Browning; Green, Zza Zza
All Records before Smith	<Smith	Smelter; Breen; Anderson; Beard
All Records between Brown and Smith	>Brown, <Smith or >Brown <Smith or >Brown and <Smith	Browning; Green; Smeltzer
All Records that start with either Brown or J	Brown:J	Brown; Johnson;
All Records that start with Sm and contain Mike	Sm; mike	Smith, Mike; Smeltzer, Mike;

What do the symbols mean?

In the examples above, symbols are used as part of the retrieval request. Below is a list of the symbols and words that they represent.

- ; and
- : or
- < less than
- > greater than
- .. contains or anything (Commonly called the "wild card" search. It can be used before, after or both.)
- / not
- = empty
- /= not empty

Date ranges can be done in a variety of ways. Below are several examples:

>=10/01/2007,<11/01/2007 - all dates between these two dates including the beginning date



{today} - today's date

>{today+30} <{today+60} - all dates greater than 30 days from today and less than 60 days from today

mm/dd/yy – current date

mm+1/./.. – current month plus one, any day of the month, any year

Selecting a Group of Records

Users can **highlight** a group of records in two ways:

By using the Shift Key

Click the first record, this will **highlight** that record

Hold down the **Shift** key

Click the last record and it will **highlight all records in between**

Click the **OK** button and it will bring up the group selected

OR

By using the control key

Hold down the **control** key and click the records that should be selected (Notice how the system will let the user skip around and select various records on the list. This is great for doing renewals, changes or daily mail.)

Click the **OK** button and it will bring up the **highlighted** records.

Views

Locaters can be customized by the individual user or by the agency as a whole. To modify the order that the fields display on an individual's locater follow the steps below:

1. In the locater, click the red arrow pointing to the right on the locater. This will open a list of available fields.
2. Click the field name and drag and drop the field where it will appear on the locater field list. Make the fields most commonly used the top three fields on the list. These three will always display when the locater is opened.

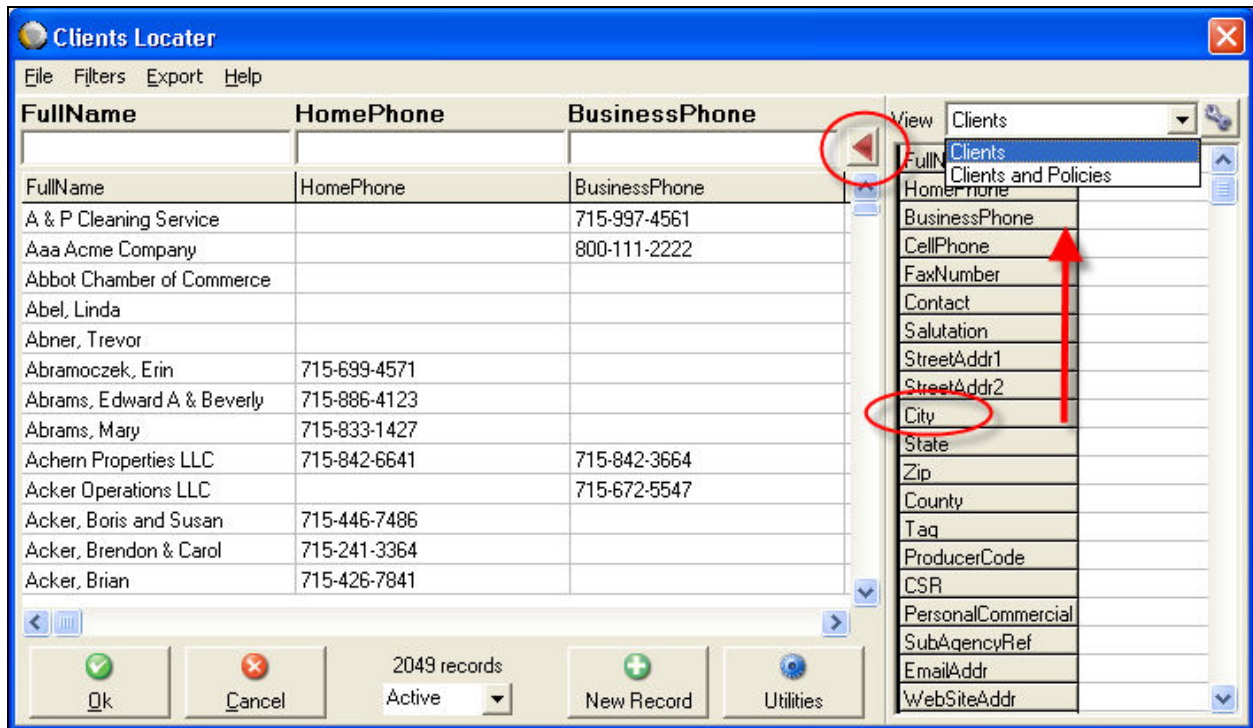


Figure 3: Expanded Clients Locater

In expanded mode, users will see *View* options: *Clients* view or *Clients and Policies* view. The *Clients* view will only contain client fields. *Clients and Policies* view will contain the client fields and fields from policies such as policy number, effective date, expiration date, etc.

Creating a Custom View

To create a custom view, follow the steps below.

1. In the locater, click the red arrow pointing to the right on the locater.
2. Click the Edit Locater View button.

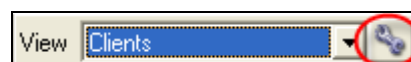


Figure 4: Edit Locater View Button

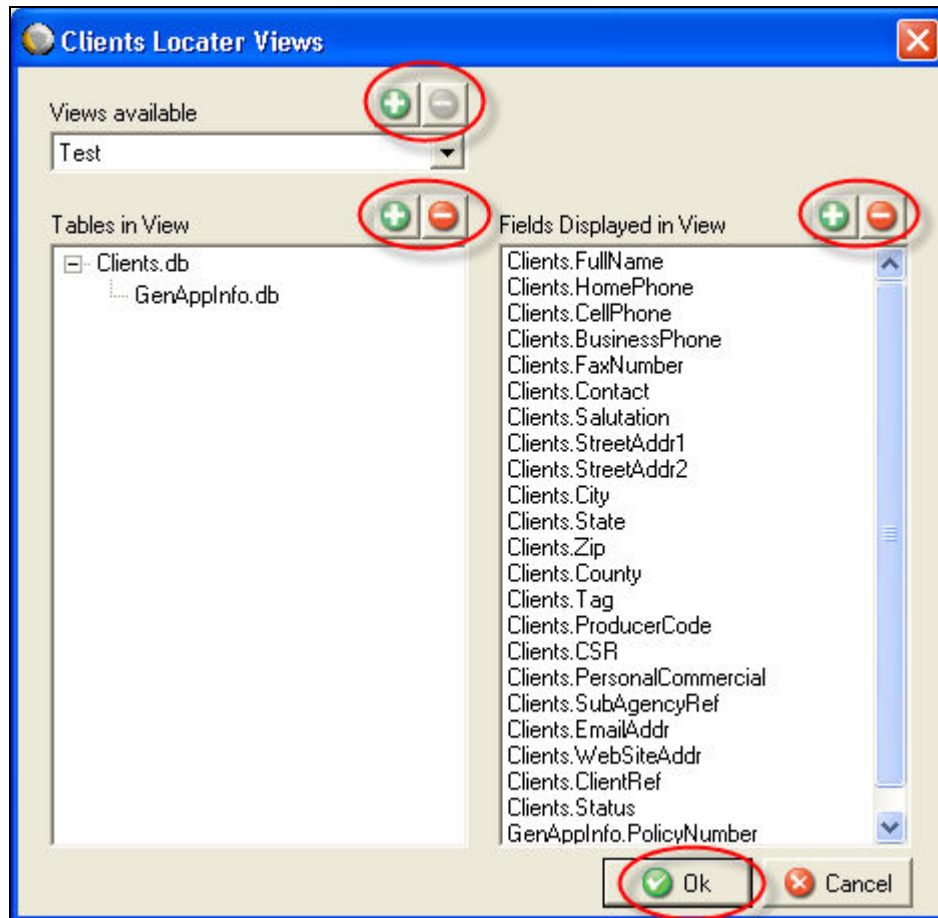


Figure 5: Adding Locater Views

3. In *Views Available*, click + to add a new View.
4. Enter a View name and click *OK*.
5. In *Tables in View*, click + to add tables to a View.
6. Highlight the table name and in *Fields Displayed in View*, click + to add fields to a View.
7. Field order can be changed by clicking on the field, dragging it to the preferred location and dropping.
8. Click *OK* to save changes.



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
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