FSC Manager

» Clients

Table of Contents

Introduction

The client screen is where it all begins. This screen contains basic client information such as name, address, phone numbers, email addresses and policy information. This is also the screen where users can create or modify ACORD applications, forms, letters, tranlogs, follow ups, receipts, access the billing and attach images/scanned documents.

Getting the client data loaded is the first step to begin using the system. In most cases, client data can be loaded through initial downloads from carriers or by transferring the data from the rater. However a portion of the data may need to be manually entered, for instance, commercial accounts and lines of business that do not download such as life and health.

Once a client has been added to the system, the user has the ability to enter and look up all information in one area quickly and easily. This chapter will review how to add new clients to the system, how to locate an existing client, and review the information available on the client screen.

Clients

How to Manually Add a New Client

1. Click on the *Clients* button on the Banner.
2. Click the *New Record* button.
3. Answer yes or no to the *Personal Account* question.
4. Enter the new client's information into the Client screen.

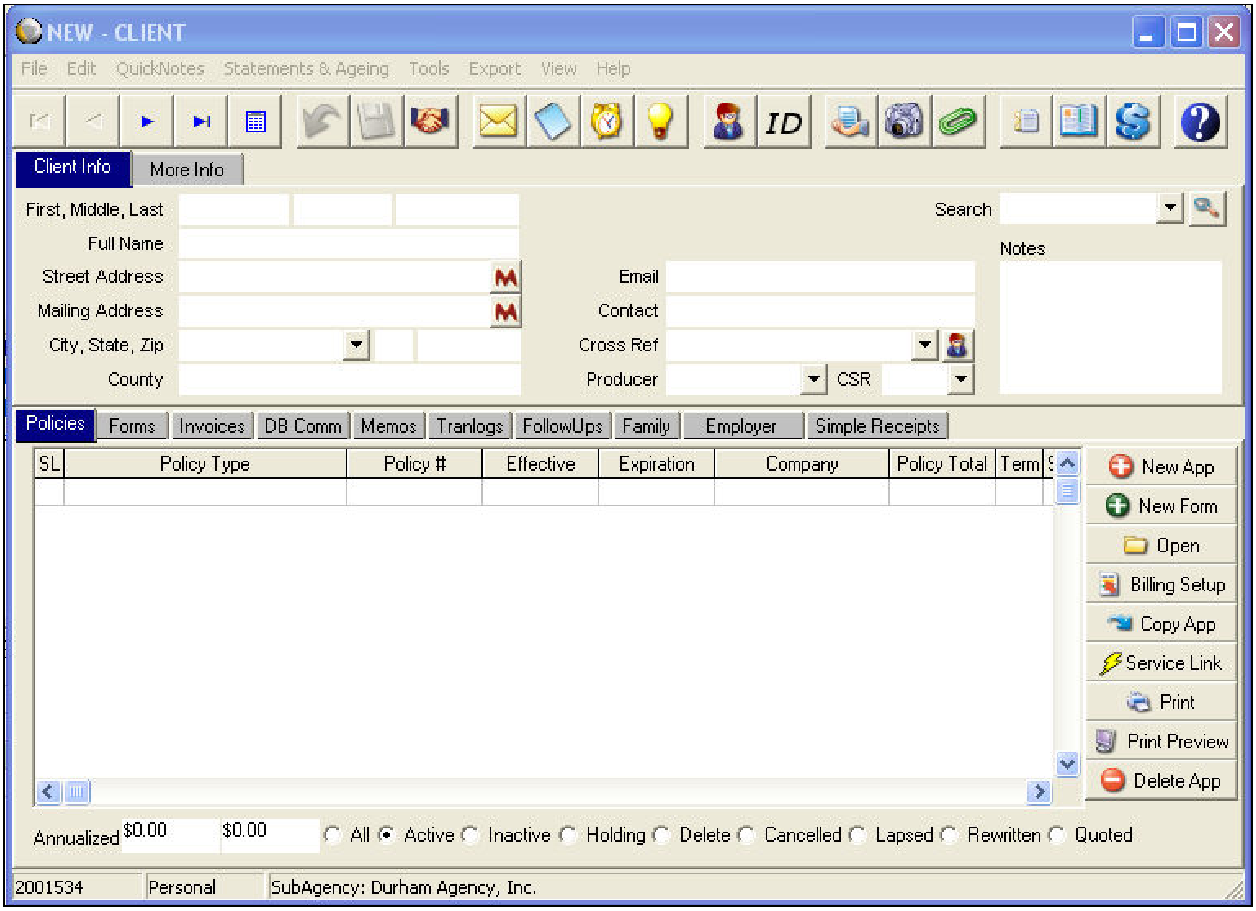

Figure 1: Client Screen

How to Open an Existing Client

1. Click on the *Clients* button on the Banner.
2. Enter the Client's last name for personal lines or business name for commercial lines in the *FullName* field of the Locater.

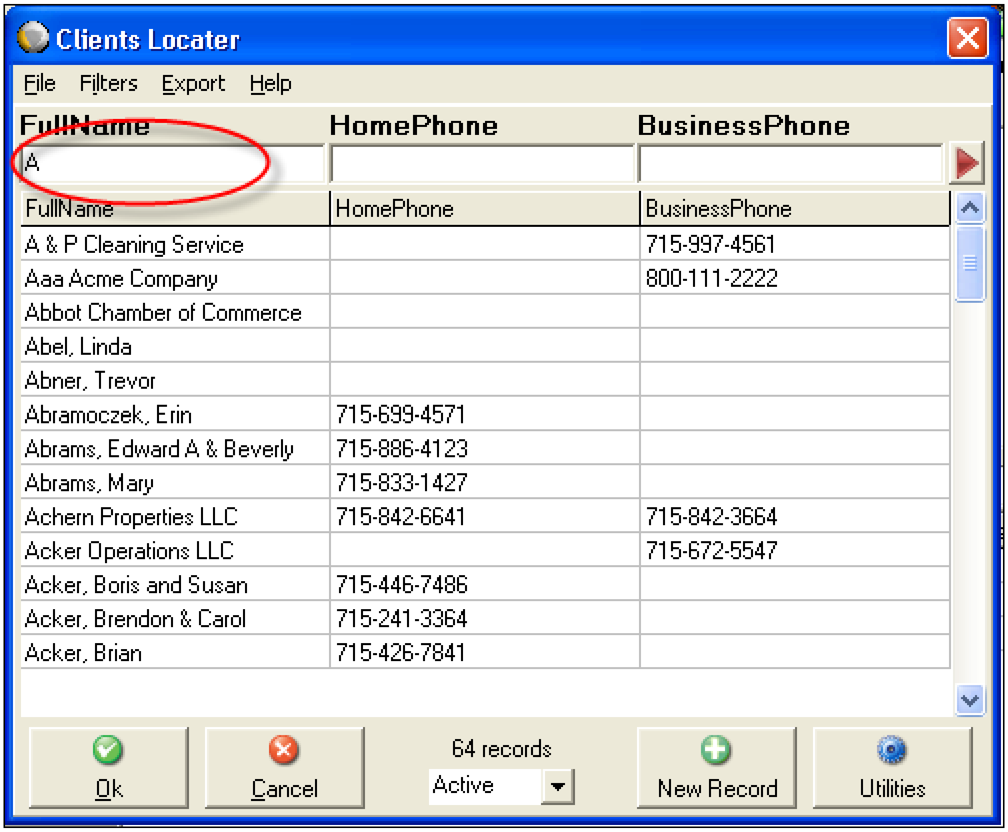

Figure 2: Clients Locator

3. Highlight and click *OK* or double click on a client to open the Client Screen.
<u>Note: Multiple client records can be opened simultaneously by holding down the Control key and clicking on each name.</u>

The Wildcard

The Clients Locater contains a wildcard feature that will allow users to lookup a client using a partial name. It will not matter if the name appears in the beginning, middle or end of the *FullName* field. This is especially useful when there are two individuals on the account with different names or if the user only recalls part of the name.

To use this feature, enter **..** before the name to locate the client's record in the Manager.

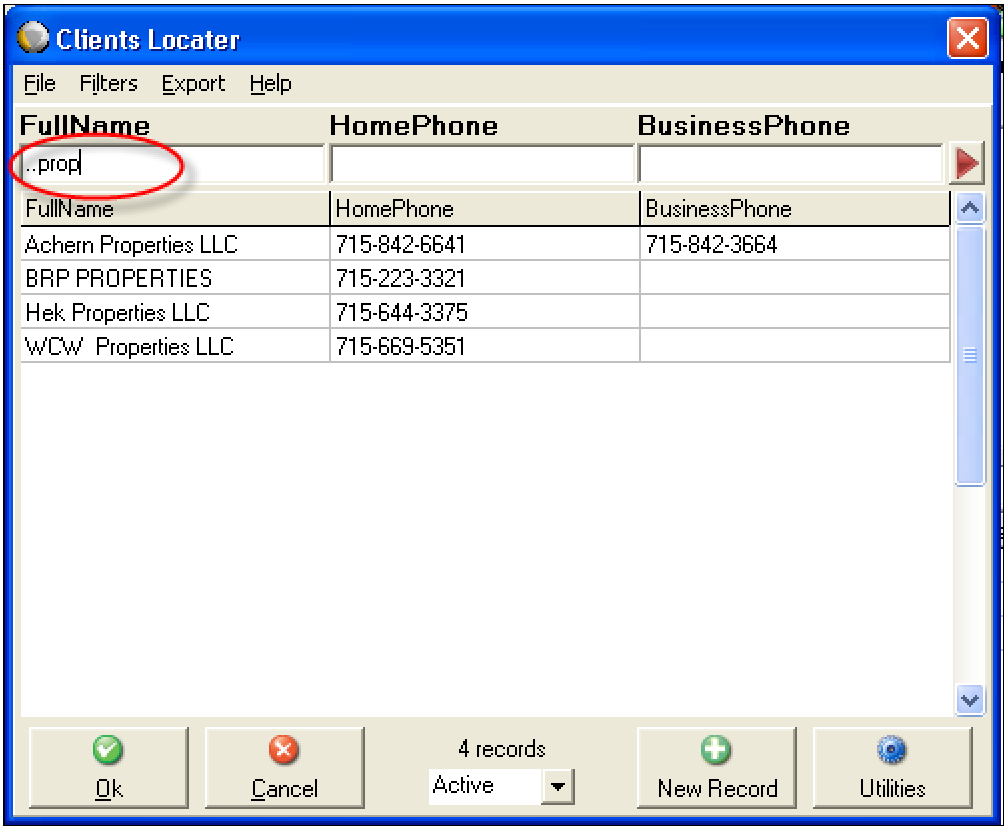

Figure 3: Wildcard Feature

General Information

Most fields are self explanatory when entering the data. However, some fields require additional information (refer to Figure 1 on page 3):

Client Info Tab

- *Full Name* - Once the First and Last name are filled in, the *Full Name* field will be populated automatically, when the user hits enter. It formats the name as last name, first name for personal lines clients. For commercial lines clients, the business name should be entered in the *Full Name* field.
- *Street Address/Mailing Address* - If a Mailing Address is not entered, the *Street Address* will move down to the *Mailing Address* field.
- *City, State, Zip* and *County* - The *City* field is a drop down menu that comes from the *System Defaults/Cities* tab. New cities can be added in the *System* area. As the user types in the city name, the list will scroll to that name. Make sure to select the correct zip code (large cities may have multiple zip codes). This will populate the *City, State, Zip* and *County* fields.

- *M Buttons* - These buttons, located to the right of the *Street* and *Mailing Address*, open MapQuest. The top M button displays a map to the client's address. The bottom M button, displays driving directions from the agency to the client's address.
- *Producer* – In this field the user can select the correct producer for this client's account.
- *Cross Ref* - The *Cross Reference* field allows users to link customers to each other within the FSC Manager. Once the *Cross Reference* has been made, the user can select that individuals name and click on the button to the right to open their Client screen. When making a *Cross Reference*, it automatically makes the reversing *Cross Reference* on the other client. There is no limit to the number of cross referenced clients. Follow the steps below to set up cross referenced clients.
    - Go to the Tools menu at the top of the client screen and select *Setup Cross Reference*.

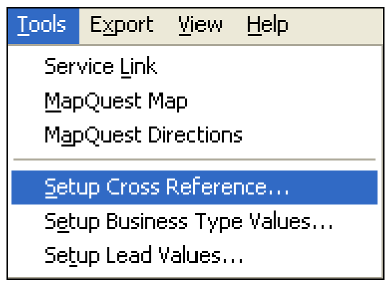

Figure 4: Tools Menu

    - Click on the green plus to add a client cross reference.

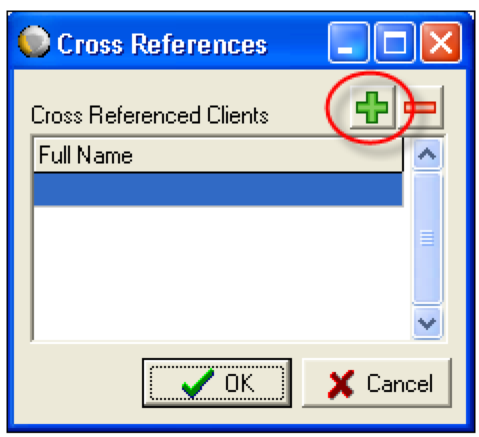

Figure 5: Cross Reference Menu

    - Use the *Search* field to find the client.

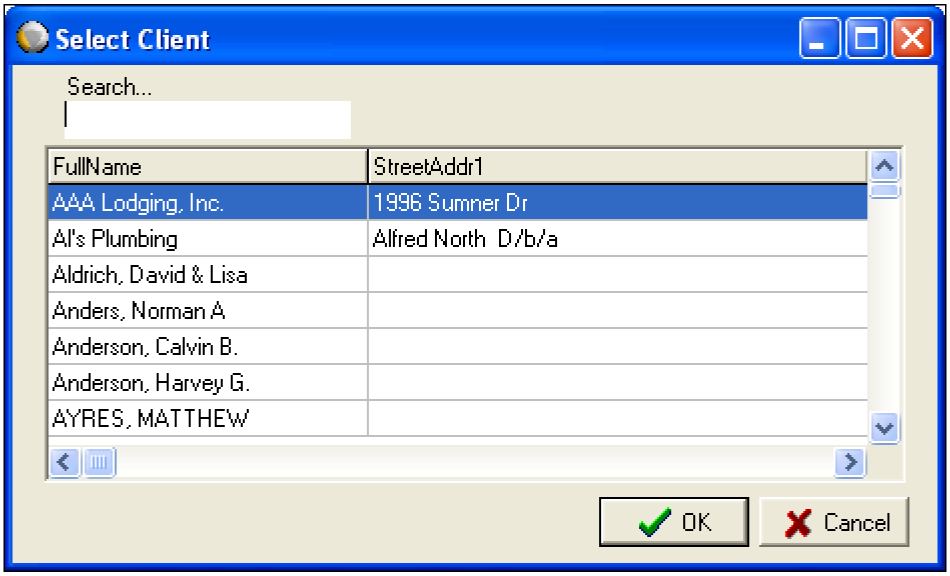

Figure 6: Cross Reference Select Client

- Highlight the correct client and click *OK*.
- Click *OK* again on the *Cross References* screen to save the changes. The selected client will appear in the *Cross Ref* drop down box.

» *Sub Agency* – In this field the user should select the correct Sub Agency for this client.

» *CSR* – The user should select the correct CSR for this client.

» *Status* - The *Status* is used to categorize clients. *Status* options include: *Prospect, Delete, Active, Inactive or Holding*. The *Status* becomes important when running reports or doing marketing.
<u>Setting a client to Delete status does not delete the client. See page 12 for instructions on permanently deleting a client.</u>

» *Search* - This field allows users to quickly find and open another client from the current client's screen. Once the client is selected click on the magnifying glass button to the right of the name to open the Client screen in a new window. **<u>Users can choose to open clients in the same window by clicking *Tools* and clicking *Open client in same window*. To navigate between clients open in the same window use the navigation arrows.</u>**

More Info Tab

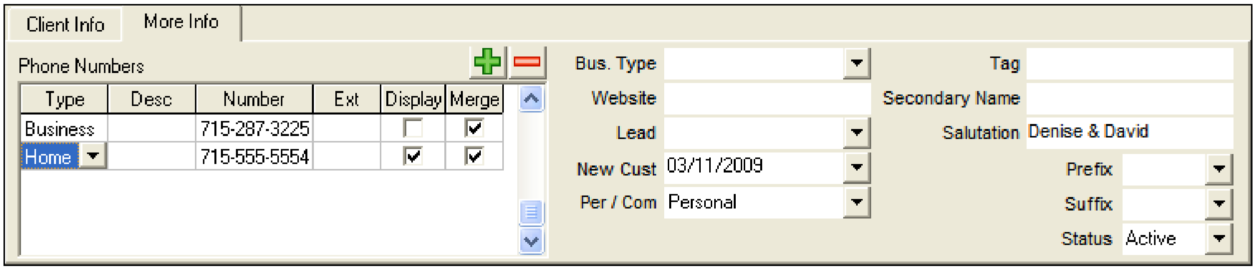

Figure 7: Client Screen More Info Tab

- *Phone Numbers* **-** FSC Manager can hold multiple phone numbers per client account. Only two phone numbers will display on Client Info tab. The two phone number will be determined by putting a check mark in the *Display* box next to the phone number. Phone numbers also merge with other areas of the system: reports, letters, ACORD forms, locaters and proposals. Only one phone number of each *Type* can merge with these areas. This is determined by putting a check mark in the *Merge* field next to the phone number that should appear in these areas.
- *Bus. Type* - The *Business Type* field is used to categorize commercial clients by type of business. This is a drop down list. The list can be modified by users (See instructions on page 9). *Business Type* information is useful if the agency represents a carrier that has a product targeted to a particular business type. In the *Reports* on the Banner, there is a report called *Business Type Reports*. This report can identify all clients throughout the system with a particular *Business Type*.
- *Website* – For business clients the user can enter the business website, double clicking the website will launch the website.
- *Lead* - The *Lead* field makes it possible for agencies to identify how clients learned about their agency. This is a drop down list. The list can be modified by users (See instructions on page 9). In the *Reports* on the Banner, there is a report called *Client Lead Report*. This report can identify and total the number of new clients and break them down by lead value. The report also looks at the *New Customer* date (see below).
- *New Cust* - The *New Customer* date field tracks when a client was added to the FSC Manager. This date works with the *Client Lead Report* to see how new clients are coming to the agency over a period of time.
- *Per/Com* – This field shows whether a client is a Personal client or a Commercial client, the user can change this field by selecting a different option from the drop-down.
- *Secondary Name* - This field can contain another name for the client account that can be added to the client locater so users can search on the name or it could be added to *Single Letters* as a merge field.
- *Salutation* - The *Salutation* field is used for letters and marketing pieces (i.e. Dear *Randy & Gail*).

» *Tag* - The *Tag* field is a miscellaneous field. If FSC Manager does not have a field for a specific piece of information, it can be placed in the *Tag* field. This is a searchable field. Example: Place the word Calendar in *Tag* field for preferred customers. Now it would be possible to print mailing labels for anyone that has the word Calendar in the *Tag*.

Expandable Fields

Almost any fields can be expanded by hitting the F6 key on the keyboard. (see below). This gives users flexibility to store additional information. Once the information is entered and the expanded field is closed, the field will turn yellow indicating there is more information. To view the information, place the cursor in the field and hit F6. To delete the expanded information, click on the minus button in the upper left corner of expanded field.

Figure 8: Expanded Field

How to Customize the Business Type or Lead values

1. Go to the *Tools* menu at the top of the client screen and select *Setup Business Type Values*… or *Setup Lead Values*….
2. Use the plus key to add additional *Business Types* or *Lead Values* and the minus key to set any types or values as inactive. To show inactive and active business types, select *All* at the bottom of the screen.

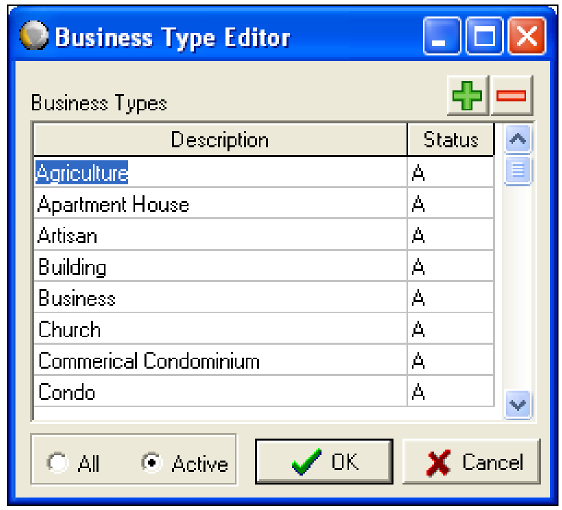

Figure 9: Business Type Editor

Client Screen Buttons

Each area of the FSC Manager has a toolbar. Many of the icons displayed in the Client screen toolbar are seen in other areas of the system.

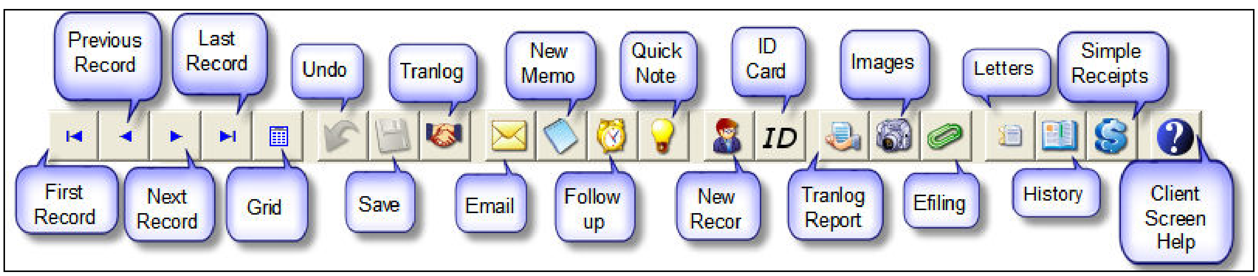

Figure 10: Client Screen Tool Bar

- *Navigation Arrows* – The navigation arrows on the top left can be used to move between multiple records.
- *Grid View* – Displays all clients selected in the locater in a grid view. The user can scroll up or down the list to move to other clients on the list.
- *Undo* – Undo the changes since the last time the record was saved.
- *Save* –Save Changes. (Changes are saved automatically when the Client screen is closed. If entering large amounts of data, it is prudent to save periodically. **Example:** When entering a commercial business auto policy with 50 vehicles, save every five to ten vehicles so that if there is a power outage, all of the data that had been “saved’ would not be lost.)

- *Tranlog* – Create a *Tranlog*. The *Tranlog* is a date and time stamped record created to document notes or changes made the client's account. This is very important for E & O.
- *Email* – Emails can be sent from a Client screen. The email form allows users to look up an email address, type the body of the email and add attachments such as ACORD forms, digital photos, or scanned documents.
- *Memo* – The *Memo* is a correspondence tool. Users can create memo templates for frequently used correspondence. These memos can be printed or emailed along with attachments.
- *Followup* – The *Followup* is a reminder to users. Followups can replace a paper pending file. These are frequently used when waiting for new policies to be issued or change requests to be completed. They are also used to remind users to cross sell specific lines of business at renewal or to remember to re-quote a previous prospect. Followups are used to remind users about collecting additional information. Followups display on the Main screen in the Followup section when the user logs into the system. They also display on each individual client on the Followups tab.
- *QuickNote* – A quicknote is similar to a post-it note. The *QuickNotes* automatically pop up each time the Client screen is opened. To delete the QuickNote, click on the trash can in the upper left corner. Once a *QuickNote* has been deleted, there is no record that it ever existed. There are two additional buttons in the upper left corner of the *QuickNote* one will allow the user to change the background color of the *QuickNote* the other will allow the user to change the color of the text in the *QuickNote*.
- *New Client* – Create a new user directly from the current Client screen.
- *ID Cards* – Create an Auto ID card. The user must highlight the appropriate policy first.
- *Tranlog Report* – Display a report of all (or filtered groups) of Tranlogs created for this client.
- *Images* – This area will display images that have been attached to the Client file. This is also one of the places that the user can attach an image to the Client file.
- *Efiling* – This area is similar to T-Filing (Transactional Filing). The user can highlight a Tranlog and click on the Efiling button to view all scanned images for that Tranlog date.
- *Letters* – This is where users can create or print Microsoft Word Mail Merge letters and client proposals.
- *History* – The history button will allow users to select a date from the drop down and view that date in the client's history to see what changes have been made to the policy or get information no longer available because of changes applied to the account.
- *Simple Receipts* –Create a receipt for direct bill customers who have dropped their payment off at the agency.

Client Screen Tabs

Each tab in the middle of the Client screen displays important information about the client and/or policies. Some tabs are not covered in this chapter because they will be explained in depth in their respective chapters.

» *Policies* - The *Policies* tab lists all active applications in date order. To see policies of other status, put a dot in *All* at the bottom of the tab. The user can double click to open an existing policy. This tab also allows users to create new applications (policies) and forms, view *Billing Setup*, copy an application for re-quoting, access *Service Link* (FSC Manager Real-Time Inquiry module), print and delete policies. This grid can be customized by each user, to re-arrage column order click the column heading and drag to the left or right. User's will also be able to determine the default status filter at the bottom of the Client screen. To do this go to the *System* button on the Banner, go to *Local Defaults*, *Select a Default Policy Status*.

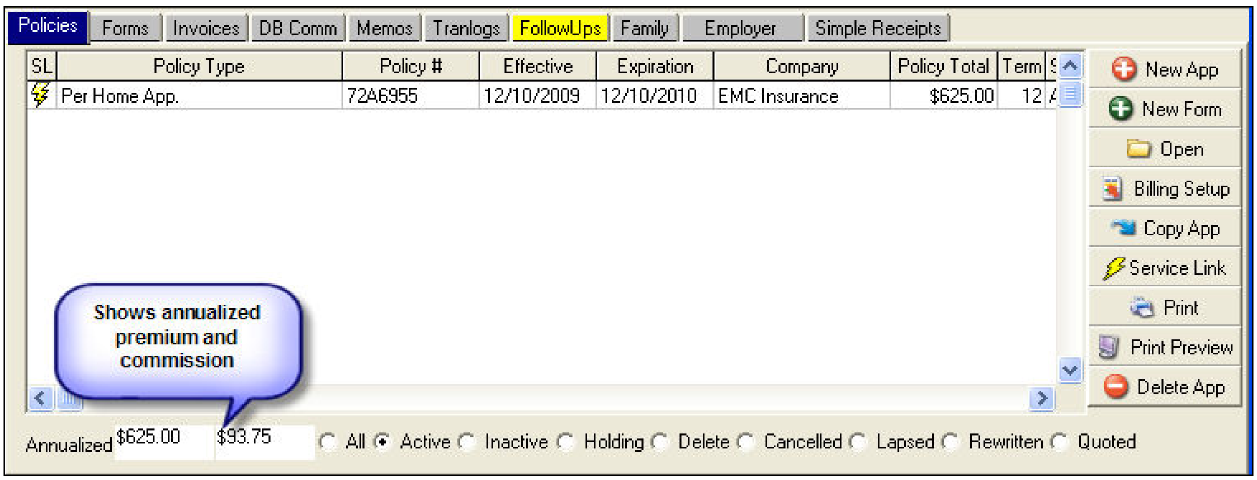

Figure 11: Policy Tab

» *Forms* - This tab will show all non-application ACORD forms: *Claims, Changes, Certificates, Cancellations, Binders, Evidence* forms and *Supplements*. To view all forms created under each type, move the black dot to that form. Double click or click the *Open* button to view the form in its entirety.

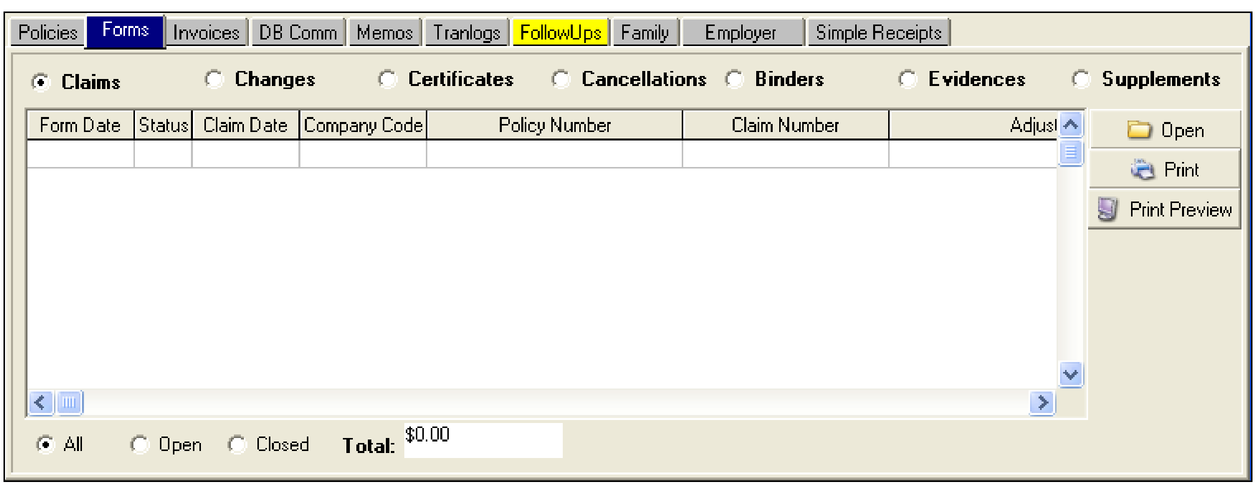

Figure 12: Forms Tab

» *Family* – This tab lists all family members. This area integrates with various policy screens such as *Personal Auto Drivers* and *Watercraft Operators*. Simply type information in and arrow down or tab to create a new line. To delete a record from the Family area, highlight the name and press Control + Delete.

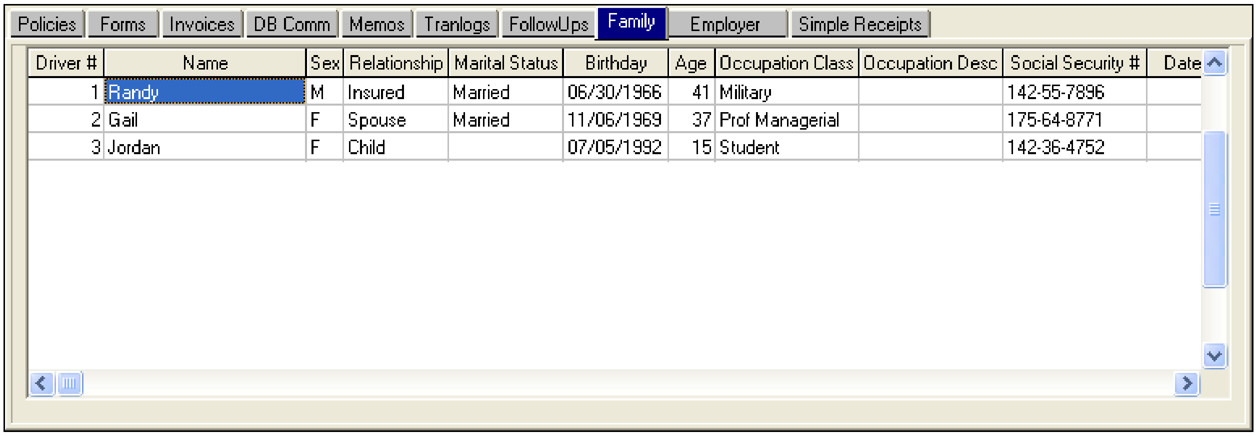

Figure 13: Family Tab

» *Employer* - The employer tab will show the applicant and co-applicant's employer information and will also integrate with some policy screens.

Figure 14: Employer Tab

Deleting a Client

Changing a Client record to Delete status does not permanently remove the record from the database. It does allow the user to exclude the client when running reports and doing marketing. To permanently remove the client record from the database, follow these instructions.

1. Click on the Client button on the Banner.
2. Search for the client and highlight the record.
Note: It is very important to highlight the correct record. If a record is not highlighted, the system will assume that the user wishes to delete all the records displayed in the locater.

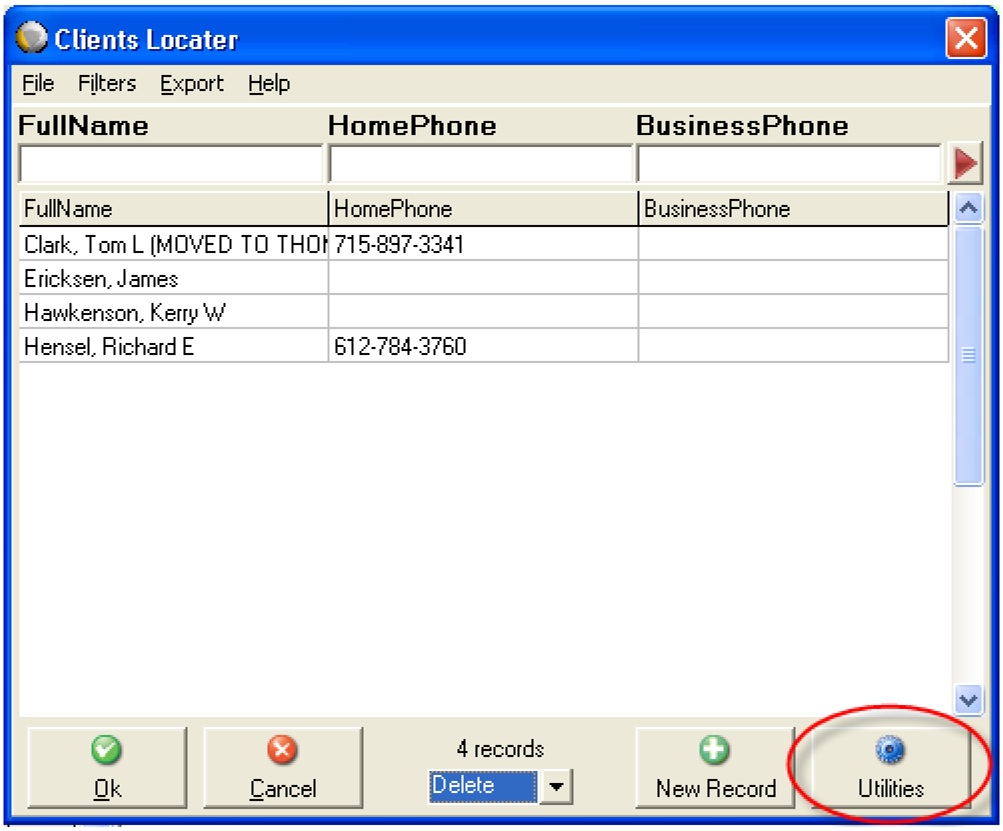

Figure 15: Client Locator

3. Click on the *Utilities* button.
4. Put a check mark in *Delete* and click *OK*.

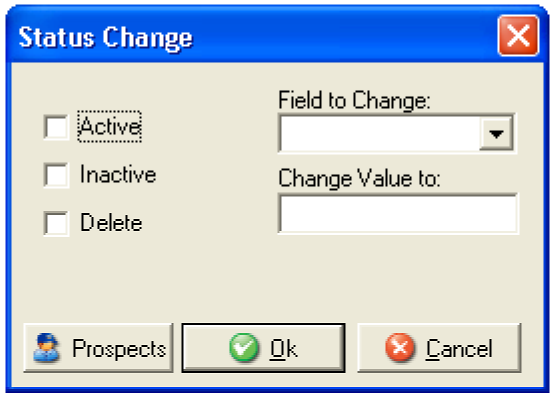

Figure 16: Utilities Menu

5. The system will ask *"Are you sure you want to delete?"* Click *Yes* to proceed or *No* to cancel.

Prospects

Prospect Information

In the FSC Manager, a prospect is entered in the same way that a regular client is entered: either add it manually in the Client locater with the *New Record* button or import it from the rater. Assign the record a status of *Prospect*. This gives the user all the functionality of a Client screen. Enter basic information such as name, address, and phone numbers. Collect policy information such as vehicles, drivers and coverages. Make Tranlogs to record conversations and Follow Ups to remember to make contact with the prospect. Having a Prospect status makes it possible to include or exclude these records when running reports or creating marketing pieces.

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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