



FSC Manager

» Rater Integration

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Introduction

FSC Manager has the ability to integrate with several comparative rating products. This allows the user to seamlessly transition from quoting a new client in the rating product to maintaining that client's data in FSC Manager. With the client data now in FSC Manager the user is able to send letters, create marketing campaigns and email a certificate of insurance for the client right from FSC Manager. The user is even able to export the client's information back into the rating product to re-quote the policy with a different carrier.

This chapter will go over how to import and export information to and from FSC Manager with FSC Rater, FSC Rater RT and MI-Rater.

Integrating with the MI-Rater

Setup Requirements

To integrate the policies in FSC Manager with the MI-Rater the MI-Rater must be installed on the computer with the Manager or through an ASP connection if connecting to the Manager through Ajasent. There is setup in both the MI-Rater and FSC Manager that needs to be completed prior to using this feature.

FSC Manager Integration Path Setup

1. Click the *System* button on the banner.
2. Go to the *Import/Export* tab.
3. Click the *Add Setup* button.
4. Highlight the Rater to be added and click *OK*.
5. That Rater should now be listed under *Export Name* and the path should be displayed under *Import/Export Options*.
6. If the rater is setup on ASP or in a Terminal Services environment the path may need to be altered to show the correct path to the location of the Rater. (To find the path, right click on the MI-Rater icon and select *Properties*. The path in *Import/Export Options* should match the *Target* in properties.)

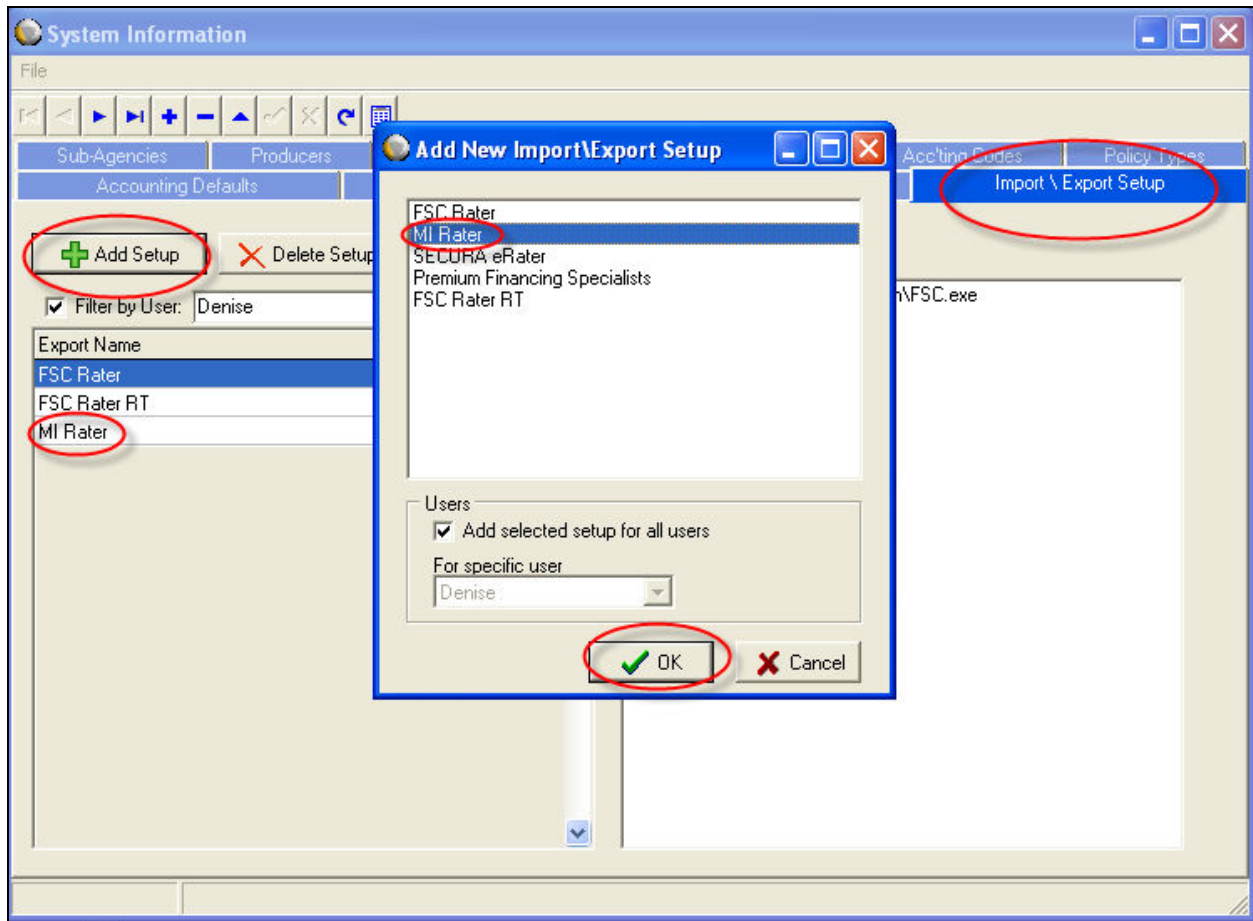


Figure 1: FSC Manager Import/Export tab

If this Rater is networked and used by all Manager users be sure to put a checkmark in Add selected setup for all users.

MI-Rater Integration Path Setup

1. Click *Setup*.
2. Click *Import/Export*.
3. Click the plus key to add the path to FSC Manager.
4. Select the line of business. **To use the integration with both lines of business, this needs to be done for both lines of business.**
5. Select *IMSWin 2000* from the drop down list.
6. Click *OK*.

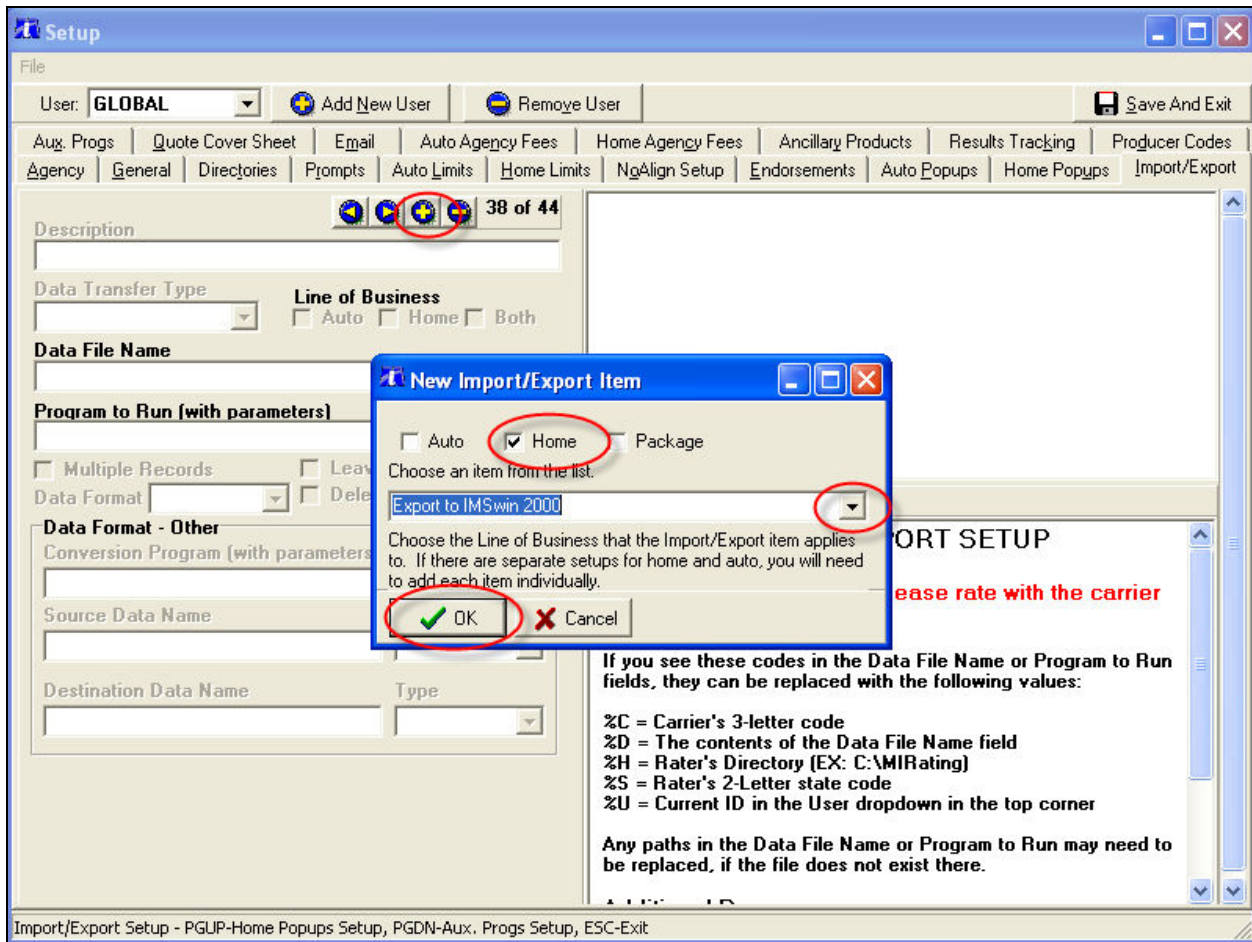


Figure 2: MI-Rater Import/Export setup

7. Verify that the path in *Program to Run* matches the path to the FSC Manager (To find the path, right click on the FSC Manager icon, select *Properties* and look at the path listed in the *Start in* field.)
8. Click Save and Exit.

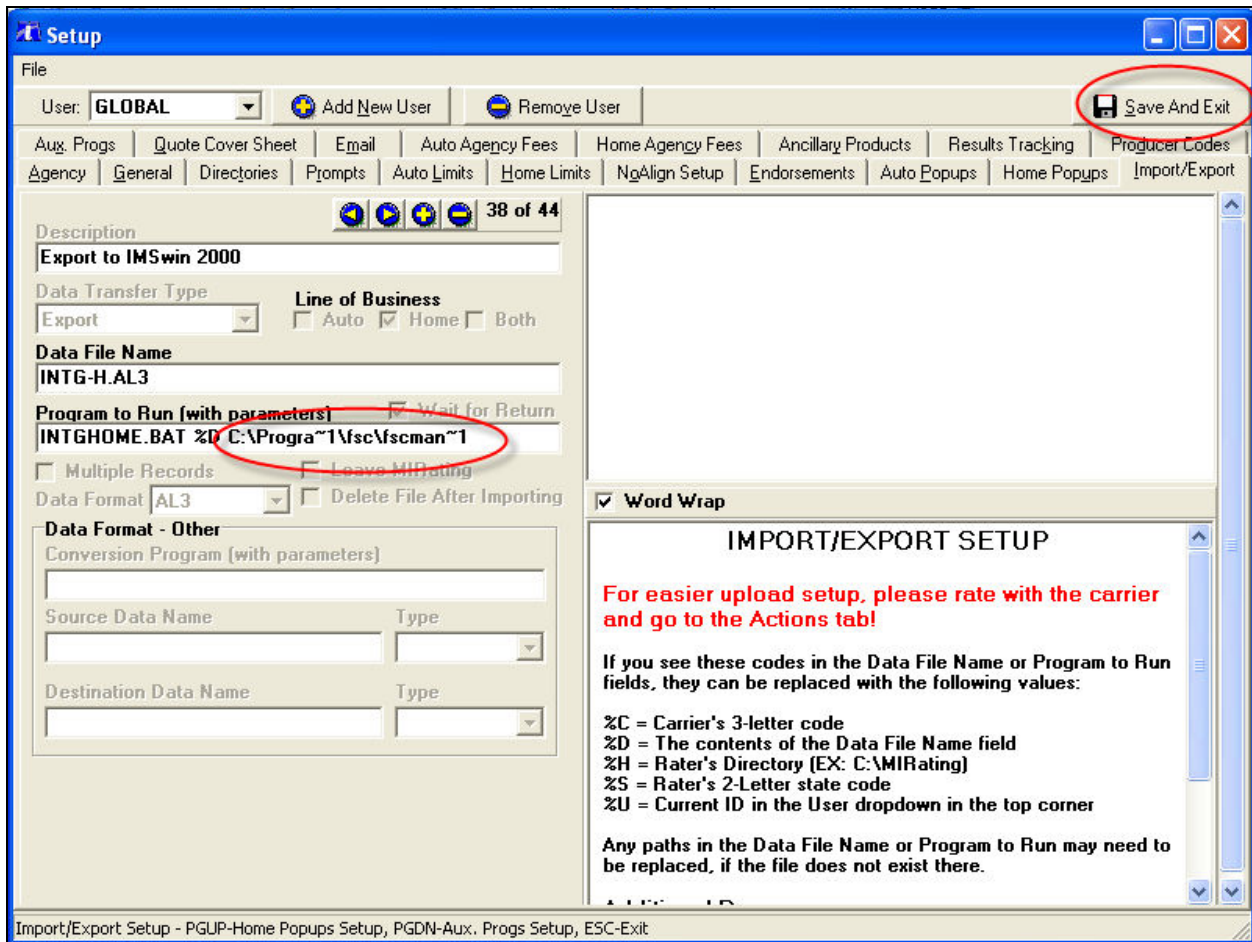


Figure 3: MI-Rater Import/Export setup

Integrating from the MI-Rater to the FSC Manager

1. Quote the policy.
2. Click the *Actions* tab.
3. Click *Export to IMSWin 2000*.

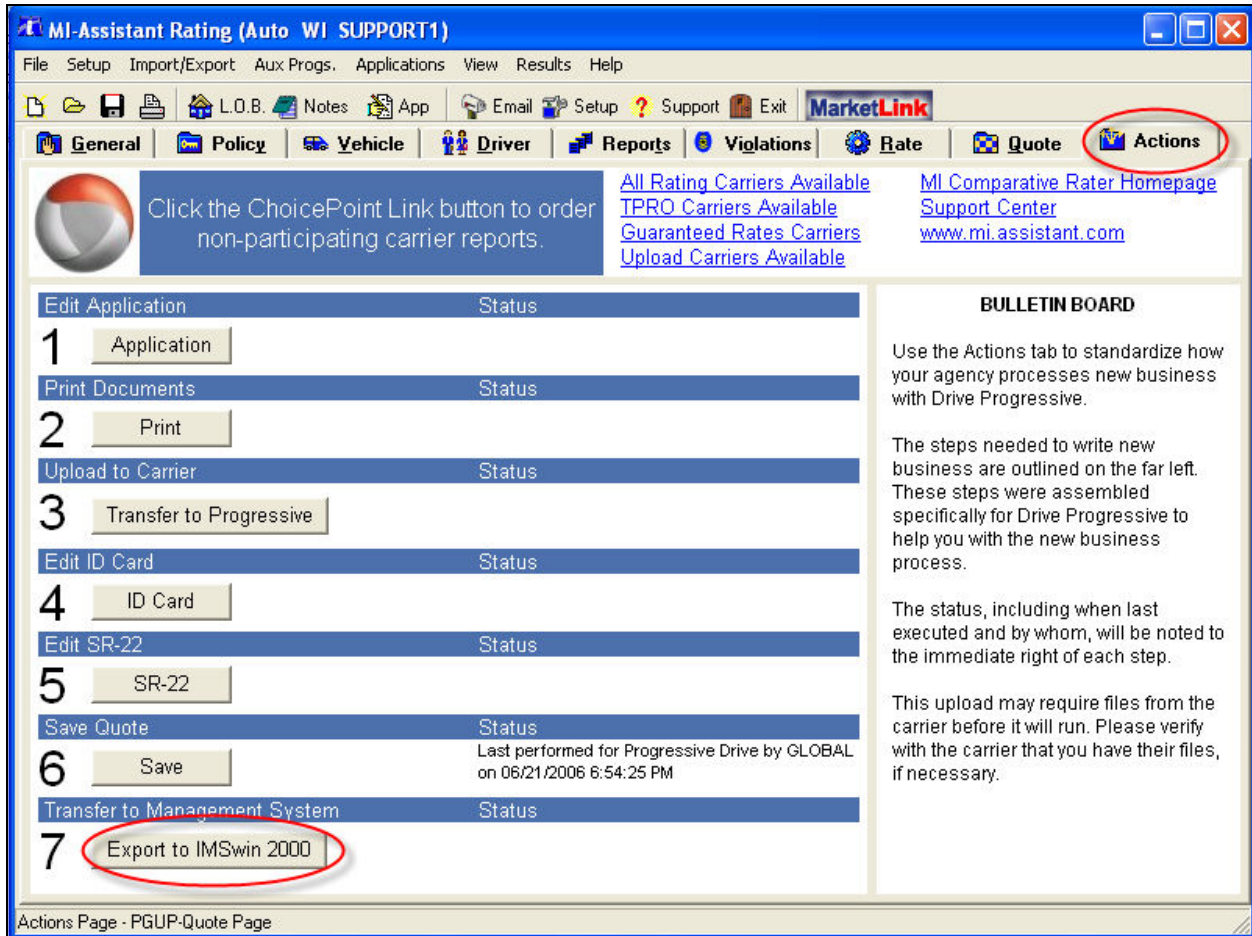


Figure 4: MI-Rater Actions tab

- Match the companies and click *Use Selected Company*.

Auto Processing - Select Company

Rating Code: Mgmt System Code:

Rating Company:

Automatically match this company in the future.

Code	Company Name
ALL	Allied
ATO	Auto Owners
BCB	Blue Cross Blue Shield
DAI	DairyLand
ENC	Encompass
GEN	General Casualty
MLI	Met Life
PRO	Progressive

INSTRUCTIONS

Highlight Company and Press 'Use Selected Company' button.
- or -
Press 'Cancel' to skip. You will then need to setup the company in the system and select the correct company in the application.

Annotation: A blue arrow points from the text "Highlight matching company" to the highlighted "PRO Progressive" row in the table.

Figure 5: Integration Company Matching screen

5. To match this company in the future check mark *Automatically match this company in the future.*
6. Click *Add Client.*

Auto Processing - Select Client

Client information for downloaded policy Pause Processing **Add Client** Use Selected Client

Full Name: DOE, JOHN Address 1: _____
 First Name: JOHN Address 2: 26550 W. MAIN ST
 Middle Name: _____ City: ELEVA
 Last Name: DOE State/Zip: WI 54738
 Salutation: _____ County: ADAMS
 Contact: _____ Phone: _____

Clients already in the system Automatic Name Format Checking

Existing Clients Filter: DOE

P/C	Client Name	Home Phone

First Name: _____
 Middle Name: _____
 Last Name: _____
 Salutation: _____
 Address 1: _____
 Address 2: _____
 City: _____
 State / Zip: _____

Figure 6: Integration Client Matching screen

7. In FSC Manager use the Clients Locator to bring up the client file. (See chapter on Clients for instructions on locating a client in the FSC Manager.)

Integrating from the FSC Manager to the MI-Rater

1. In FSC Manager open a client file.
2. Highlight the policy to quote and click *Copy App* this will create a Future Application.

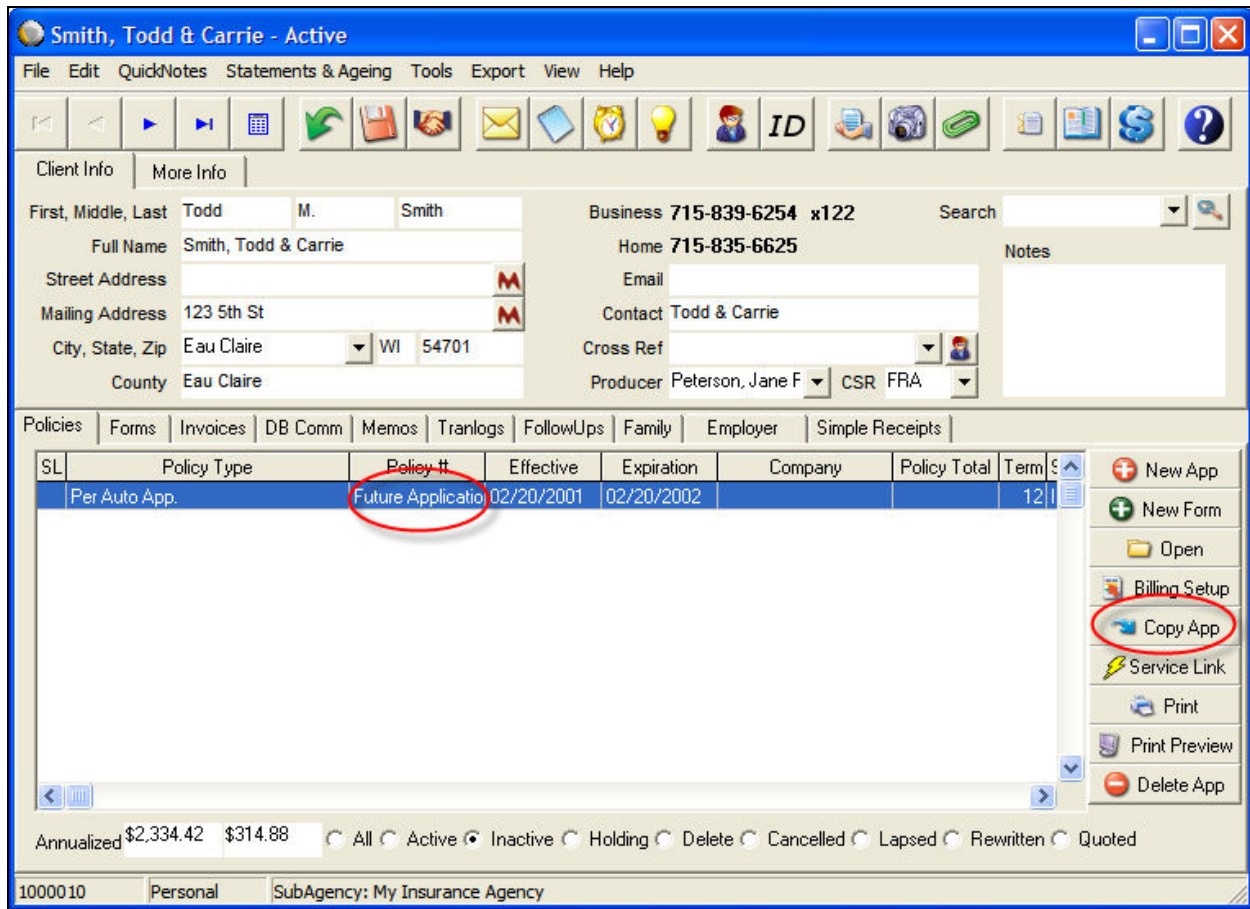



Figure 7: FSC Manager Client screen

3. Open the Future Application.

4. Click the Rater button  (a house for home apps/a car for auto apps).

5. Select the Rater you are going to export to and click OK.

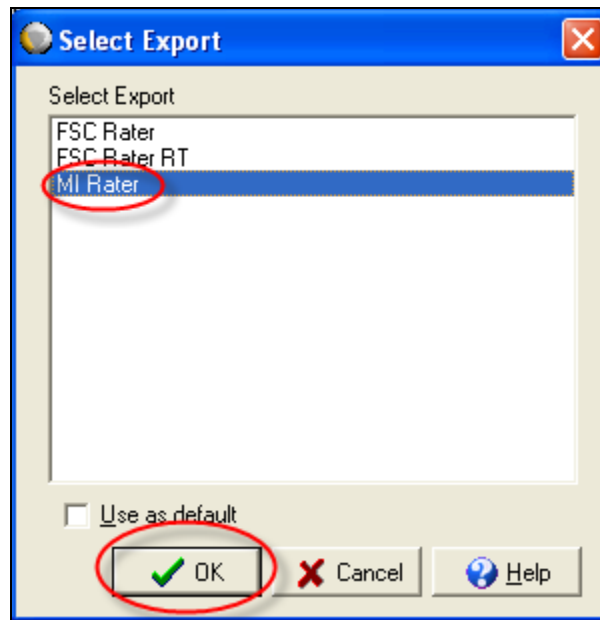


Figure 8: Export Selection screen

6. In the Rater re-quote the policy.

Integrating with the FSC Rater

Setup Requirements

To integrate the policies in FSC Manager with the FSC Rater the FSC Rater must be installed on the computer with the Manager or through an ASP connection if connecting to the Manager through Ajasent. There is setup in both the FSC Rater and FSC Manager that needs to be completed prior to using this feature.

FSC Manager Integration Path Setup

1. Click the *System* button on the banner.
2. Click the *Import/Export* tab.
3. Click the *Add Setup* button.
4. Highlight the Rater to be added and click *OK*.
5. That Rater should now be listed under *Export Name* and the path should be displayed under *Import/Export Options*.

- If you are using this Rater on ASP or in a Terminal Services environment the path may need to be altered to show the correct path to the location of the Rater. (To find the path, right click on the FSC Rater icon and select *Properties*. The path in *Import/Export Options* should match the *Target* in properties.)

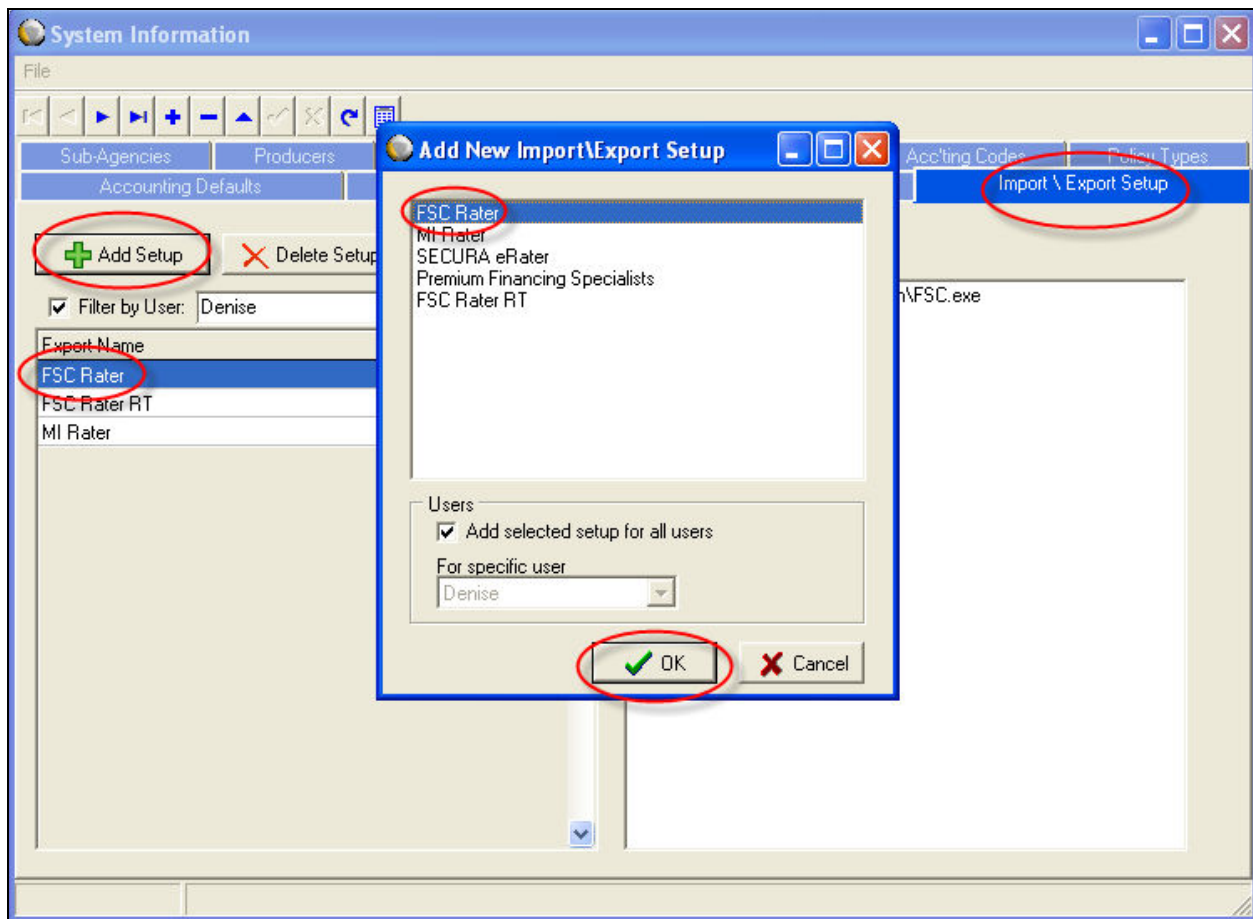


Figure 9: FSC Manager Import/Export tab

If this Rater is networked and used by all Manager users be sure to put a checkmark in Add selected setup for all users.

FSC Rater Integration Path Setup

- Click *Tools*.
- Click *Setup*.

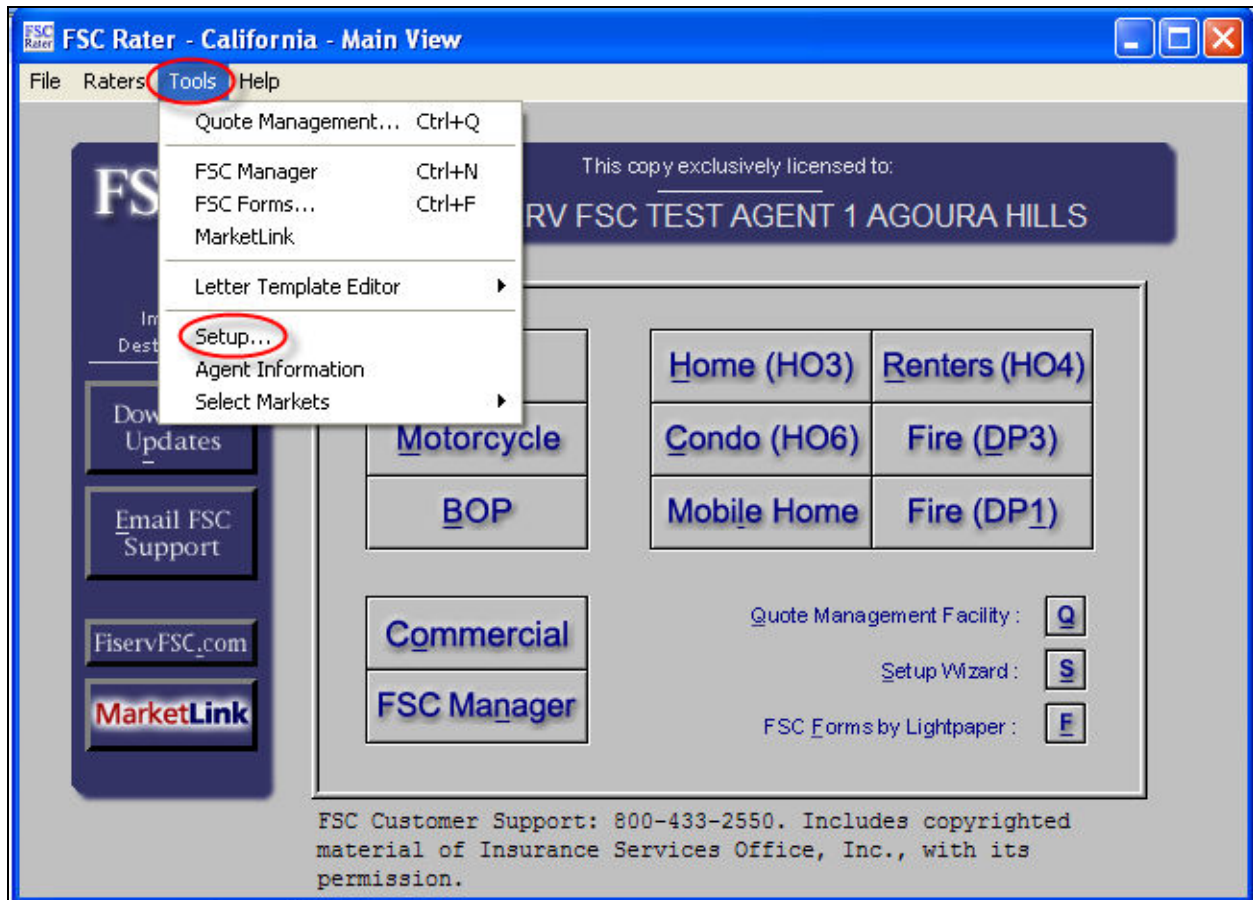


Figure 10: FSC Rater Setup

3. Click the *Management System Exporter* tab.
4. Select *FSC Manager* from the System dropdown list.
5. In Destination browse to the path for the FSC Manager. (To find the path, right click on the FSC Manager icon, select *Properties* and look at the path listed in the *Start in* field.)
6. Click *OK*.

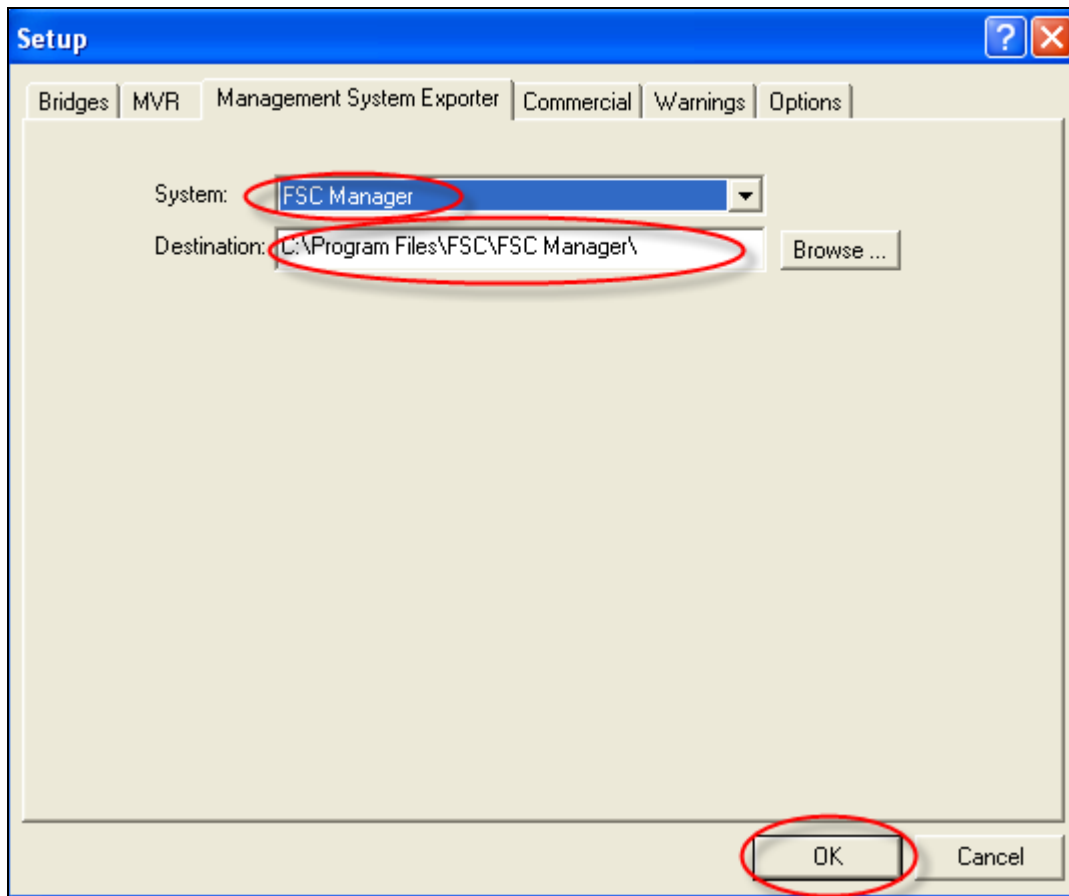


Figure 11: FSC Rater Management System Exporter

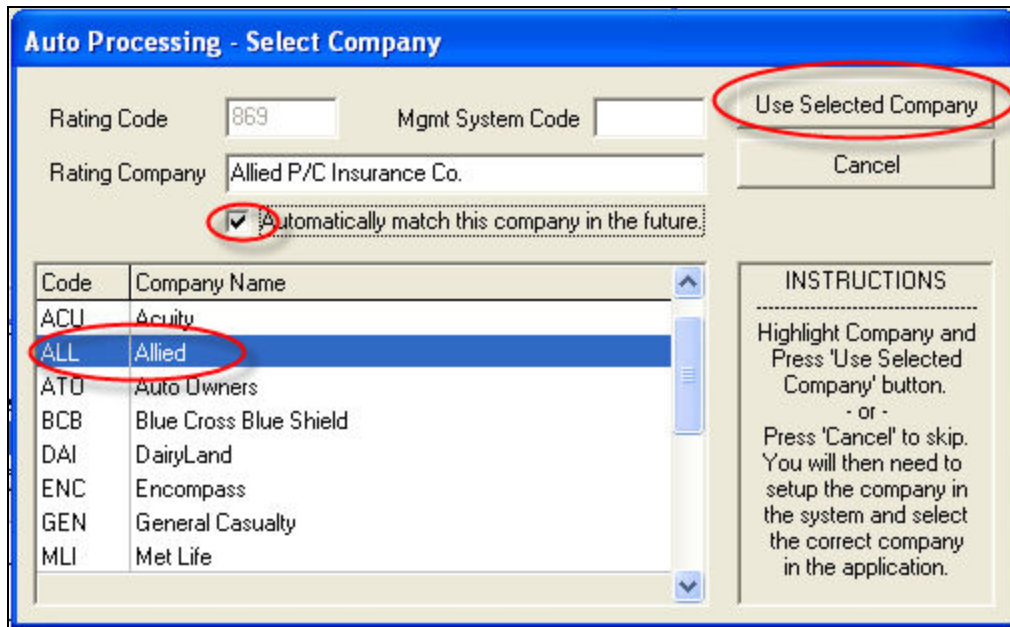
Integrating from the FSC Rater to the FSC Manager

1. Open the policy in FSC Rater.
2. Complete the quote and click the integration button.



Figure 12: FSC Rater Toolbar

3. Save the quote.
4. Match up the companies and click *Use Selected Company*.
5. To match this company in the future put a check mark in *Automatically match this company in the future*.



Auto Processing - Select Company

Rating Code: 869 Mgmt System Code:

Rating Company: Allied P/C Insurance Co.

Automatically match this company in the future.

Code	Company Name
ACU	Acuity
ALL	Allied
ATU	Auto Owners
BCB	Blue Cross Blue Shield
DAI	DairyLand
ENC	Encompass
GEN	General Casualty
MLI	Met Life

INSTRUCTIONS

Highlight Company and Press 'Use Selected Company' button.
- or -
Press 'Cancel' to skip. You will then need to setup the company in the system and select the correct company in the application.

Figure 13: Integration Company Matching screen

6. Click *Add Client*.

Auto Processing - Select Client

Client information for downloaded policy

Full Name: WASHINGTON, GEORGE Address 1: _____
 First Name: GEORGE Address 2: 12345 CHERRY LANE
 Middle Name: _____ City: SAN DIEGO
 Last Name: WASHINGTON State/Zip: CA 92123
 Salutation: _____ County: SAN DIEGO
 Contact: _____ Phone: 715-555-5555

Clients already in the system Automatic Name Format Checking

Existing Clients Filter: WASHINGTON

P/C	Client Name	Home Phone

First Name: _____
 Middle Name: _____
 Last Name: _____
 Salutation: _____
 Address 1: _____
 Address 2: _____
 City: _____
 State / Zip: _____

Figure 14: Integration Client Matching screen

7. In FSC Manager use the Clients Locator to bring up the client file. (See chapter on Clients for instructions on locating a client in the FSC Manager.)

Integrating from FSC Manager to FSC Rater

1. In FSC Manager open a client file.
2. Highlight the policy to quote and click *Copy App* this will create a Future Application.

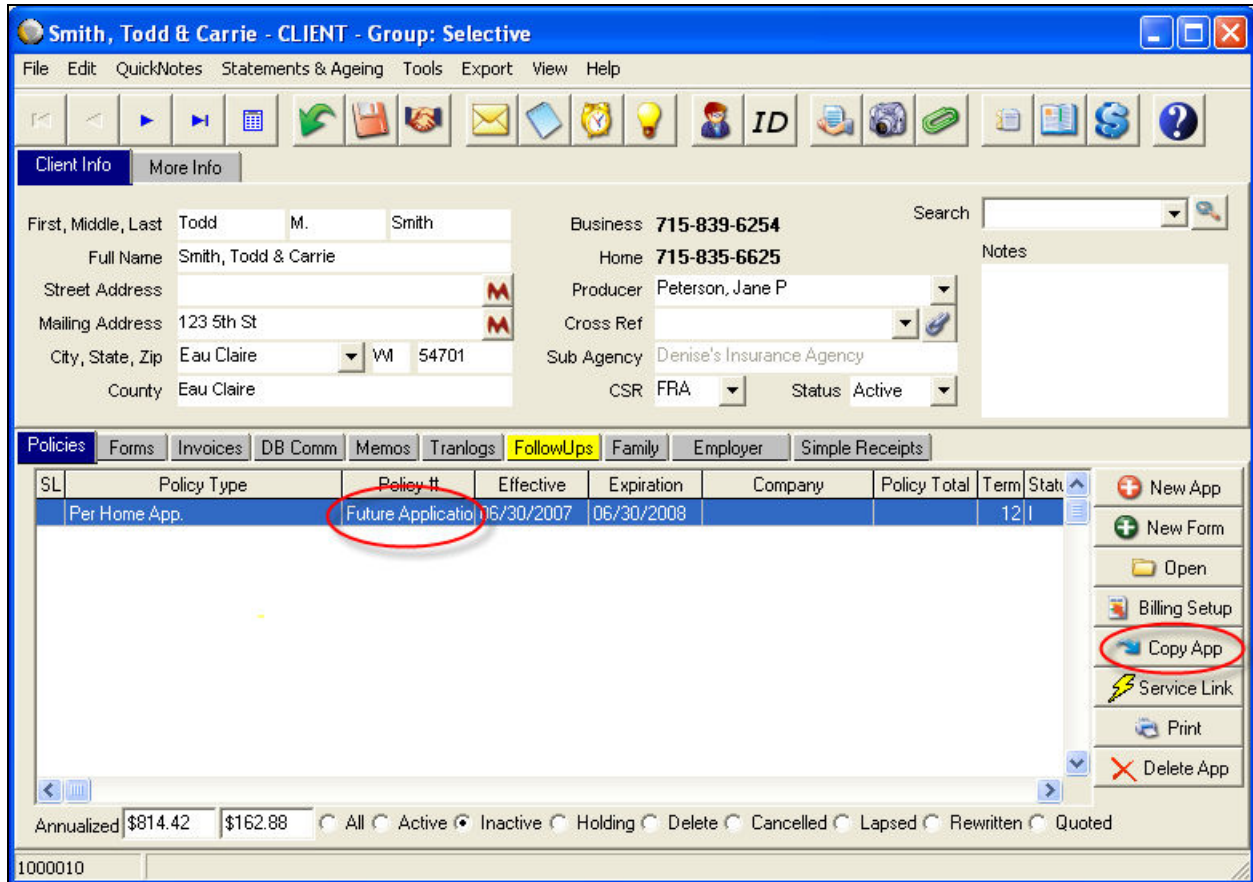



Figure 15: FSC Manager Client screen

3. Open the Future Application.
4. Click the Rater button  (house for home apps/car for auto apps).
5. Select the Rater you are going to export to and click OK.

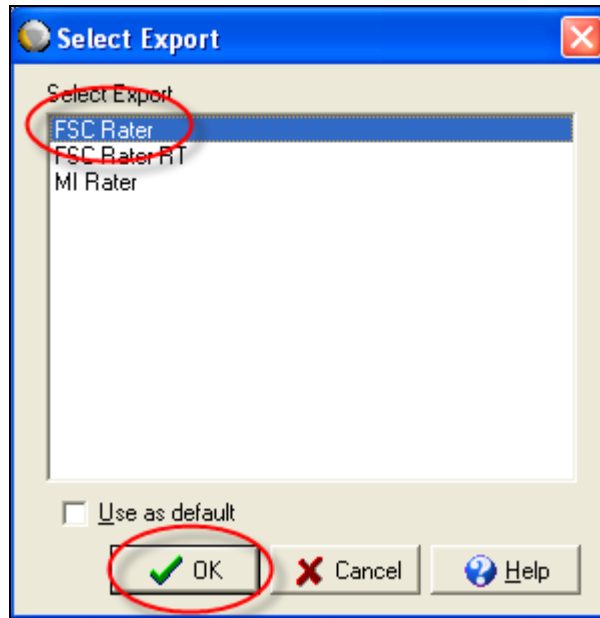


Figure 16: Export Selection screen

6. In the Rater re-quote the policy

Integrating with the FSC RT Rater

FSC Manager Integration Path Setup

1. Click the *System* button on the banner.
2. Click the *Import/Export* tab.
3. Click the *Add Setup* button.
4. Highlight the Rater to be added and click *OK*.
5. That Rater should now be listed under *Export Name* and the path should be displayed under *Import/Export Options*.

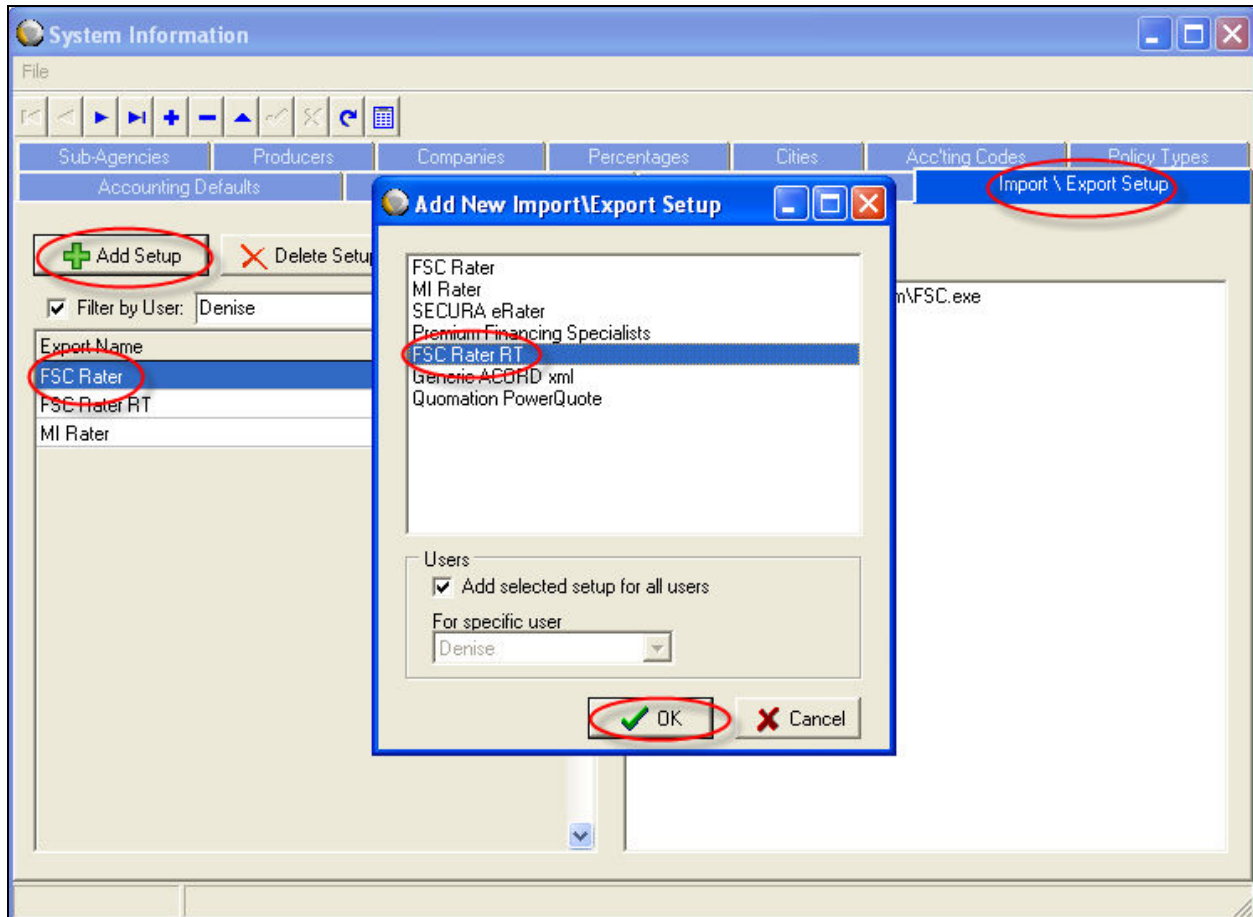


Figure 17: FSC Manager Import/Export tab

If this Rater is networked and used by all Manager users be sure to put a checkmark in Add selected setup for all users.

Integrating from FSC Manager to FSC Rater RT

1. In FSC Manager create a new client or open an existing client. **See the Clients chapter for more information on entering a new client.**
2. Enter a new app (policy) with the information to be sent to FSC Rater RT or open an existing app and click *Copy App* to create a Future Application.

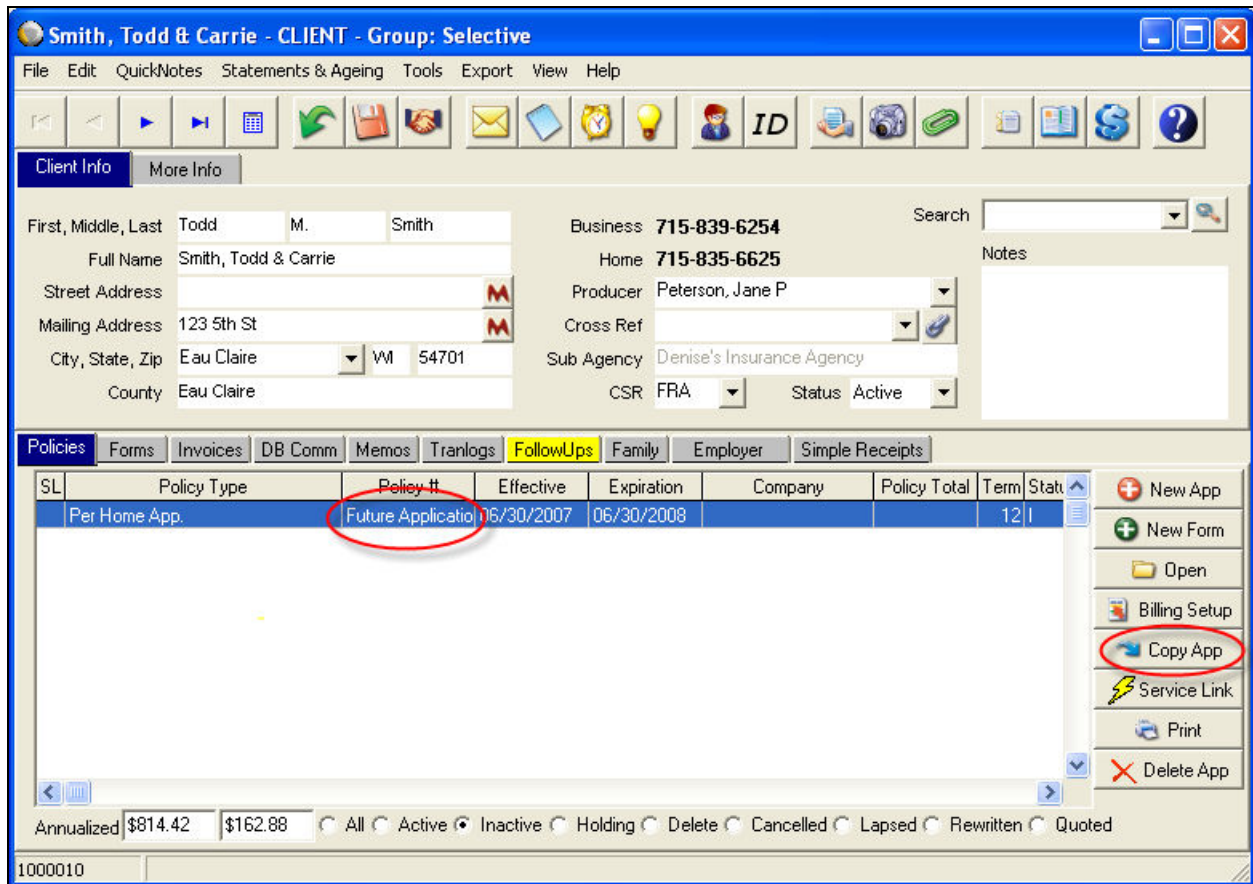


Figure 18: FSC Manager Client screen

3. Open the application.
4. Click the Rater button  (house for home apps/car for auto apps).
5. Select the Rater you are going to export to and click OK.

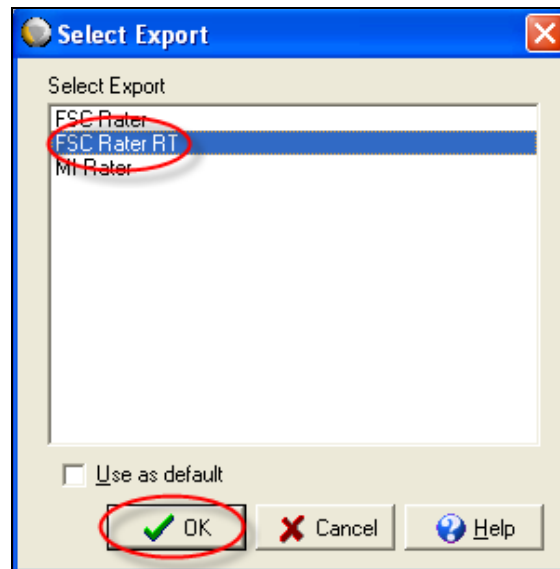
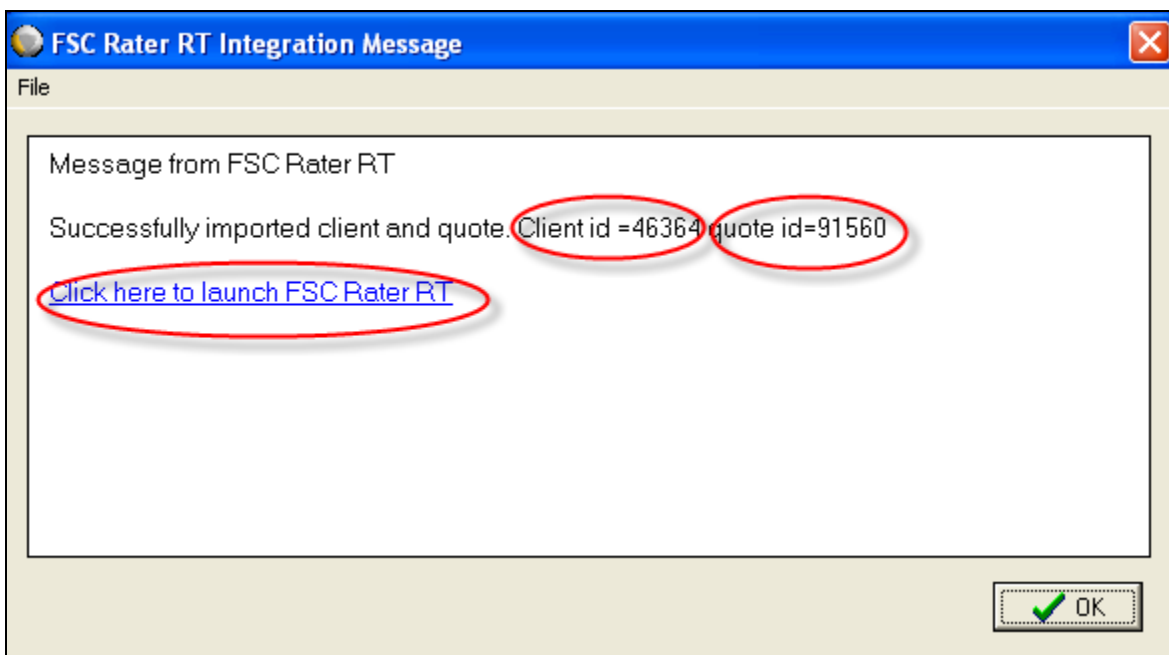


Figure 19: Export Selection screen

- The following message will appear, note the *Client id* or *quote id* and click the link to open FSC Rater RT.



- In the rater quote the policy.



Obtaining Support

If you have any questions about this topic, 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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