# FSC Manager

## » Memos

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# Introduction

Memos are correspondence to customers or carriers and can be printed or emailed.  Users may create templates for commonly used correspondence.  Memos are in a rich text format.  They are simple to use and easy to modify.  This chapter will cover how to create a new Memo, retrieve a previously created Memo and change the status of a Memo.  It will also describe how to create a Memo template.

# Memos

## How to Create Memos

Memos can be created from various screens throughout the system: Client, Application and Forms.

1. Click on the Memo  button from the toolbar.
2. The *To*: field on the Memo will automatically populate with the client's name and address.  To change the *To*: field, click the ellipses button.

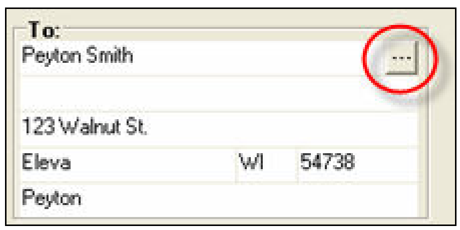


**Figure 1: Change To Field**

Select a different recipient from Clients, Prospects, Companies, General Agencies or the Address Book.  When selecting from the Companies or Address Book, also select a contact if the memo should be directed to that individual.

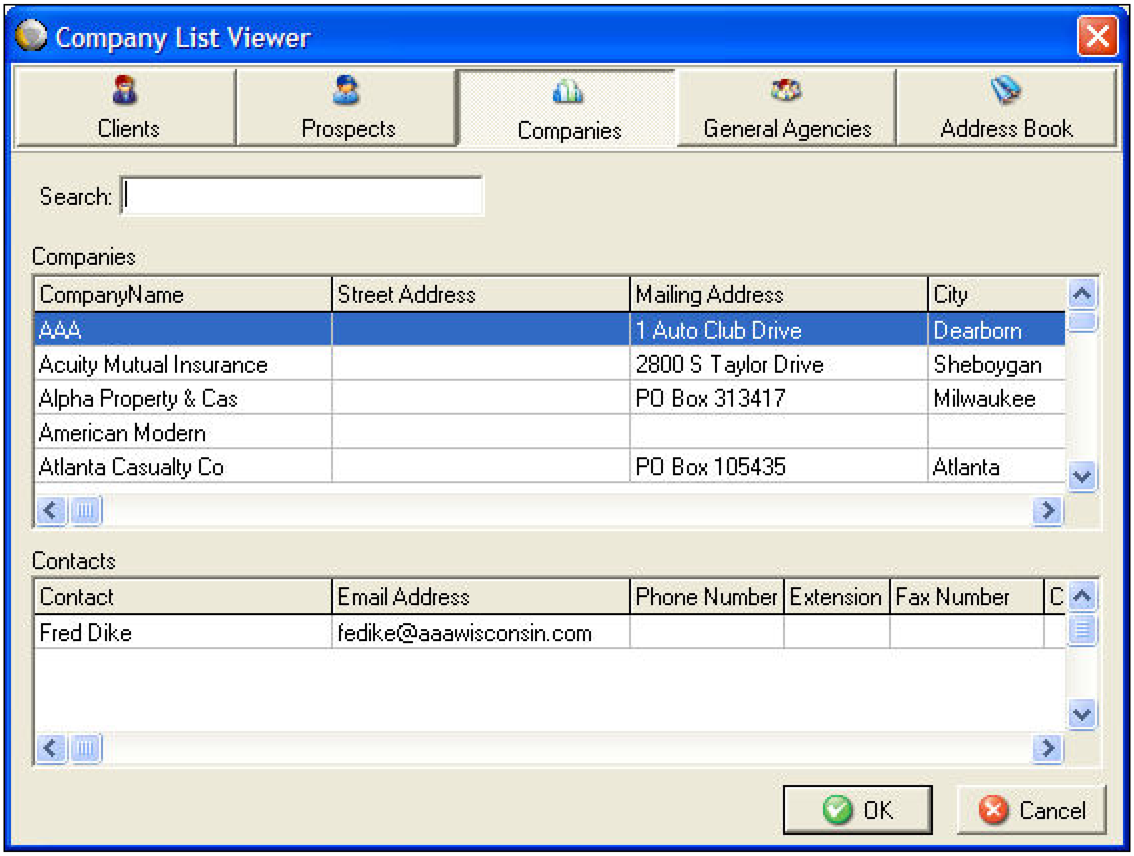


**Figure 2: Clients List Viewer**

3. Enter a *Subject*.
4. Click *Policy Select* button to pull in policy information such as company name, policy number, etc.
5. Select a *Template* from the dropdown list. This will merge all of the information selected above into the memo body. Initially, there is only one memo template – *OldMemoDefault*. Agencies may make custom templates for preferred memo layout or for commonly sent memos.
6. Add or change the memo body. The Memo has a toolbar similar to one found in Word that allows the user to make formatting changes and check spelling.

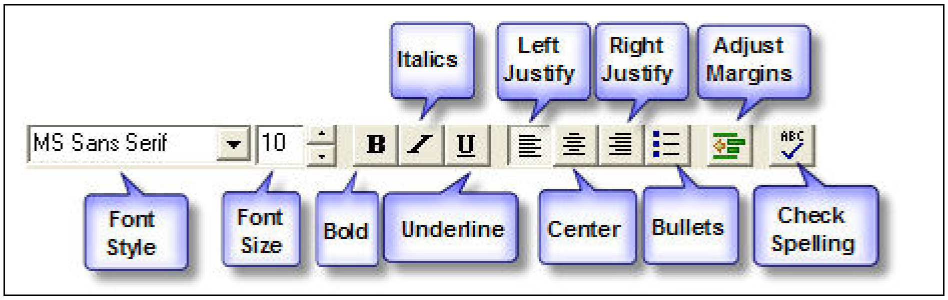


**Figure 3: Formatting Toolbar**

**7.** Select a *Category* that briefly identifies the subject of the memo from the *Category* dropdown.

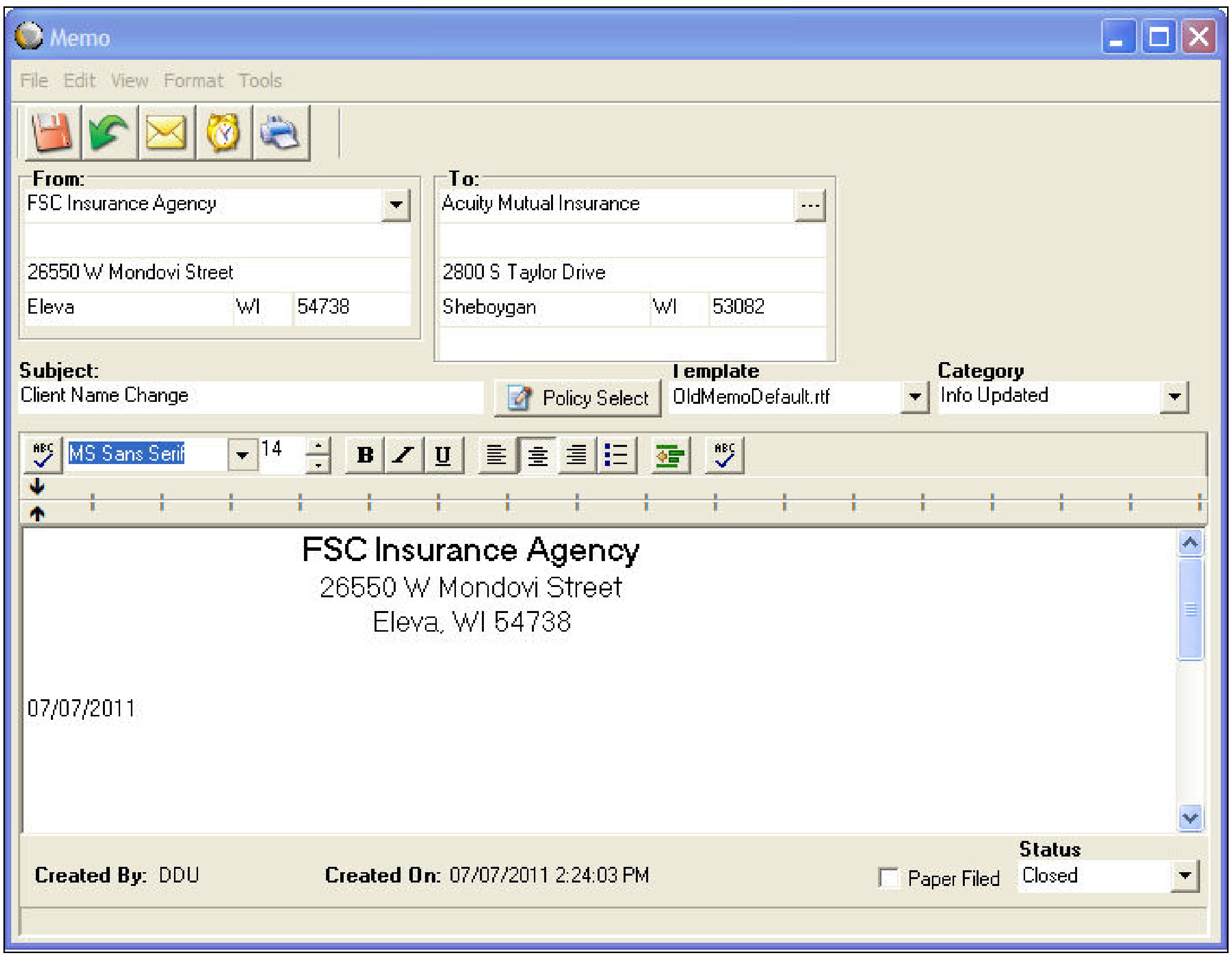


**Figure 4: Memo Screen**

8. Use the *Create Followup* button if a Follow Up is needed.
9. The link button is used to Secure Memos. **See below section How to Secure a Memo.**
10. If there is paper or document regarding this Memo going into imaging or file cabinet, put a check mark in the *Paper Filed* field.
11. The Memo can be saved and closed to complete later or it can be printed or emailed using the icons on the top toolbar of the Memo.
12. The Memo *Status* will automatically change to *Closed* unless a Follow Up has been created. If a Follow Up is created, it will remain at *Open* status until the Follow Up is resolved.

Each Memo linked to a client will automatically create a Tranlog with the Memo details. To view the Tranlog go to the *Tranlog* tab on the Client screen. The *Subject* of the Memo will become the first line of the Tranlog. If a Memo is opened and changed in any way, the entire Memo will record to the Tranlog again.

## How to Retrieve a Memo

There are two ways to retrieve a Memo, from the Client screen Memos tab and from the Main screen *Memos* button on the Banner.

**Client Screen**

1. Go to the Memos tab on the Client screen.
2. The Memo tab defaults to showing *Open* Memos – memos that have an outstanding Follow Up. To view a *Closed* Memo, change the status filter at the bottom to *Closed*.
3. Double click on the Memo to open it.

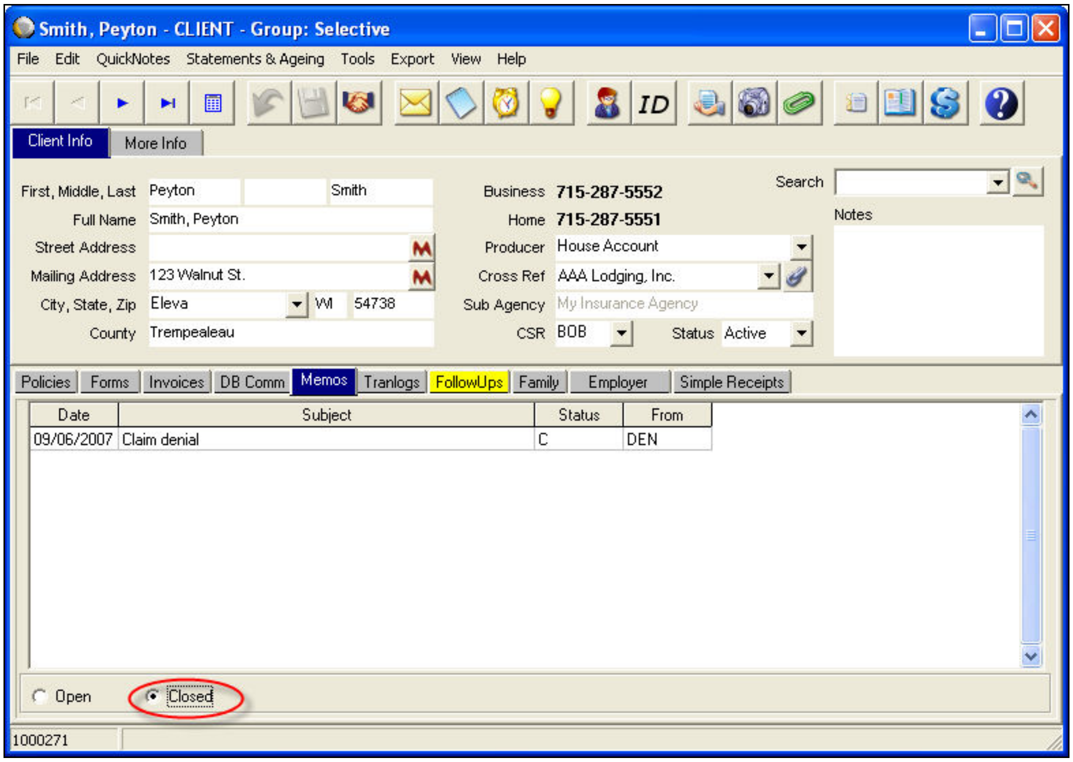


Figure 5: Client Screen/Memos tab

**Main Screen**

1. Click on the *Memos* button on the Banner.

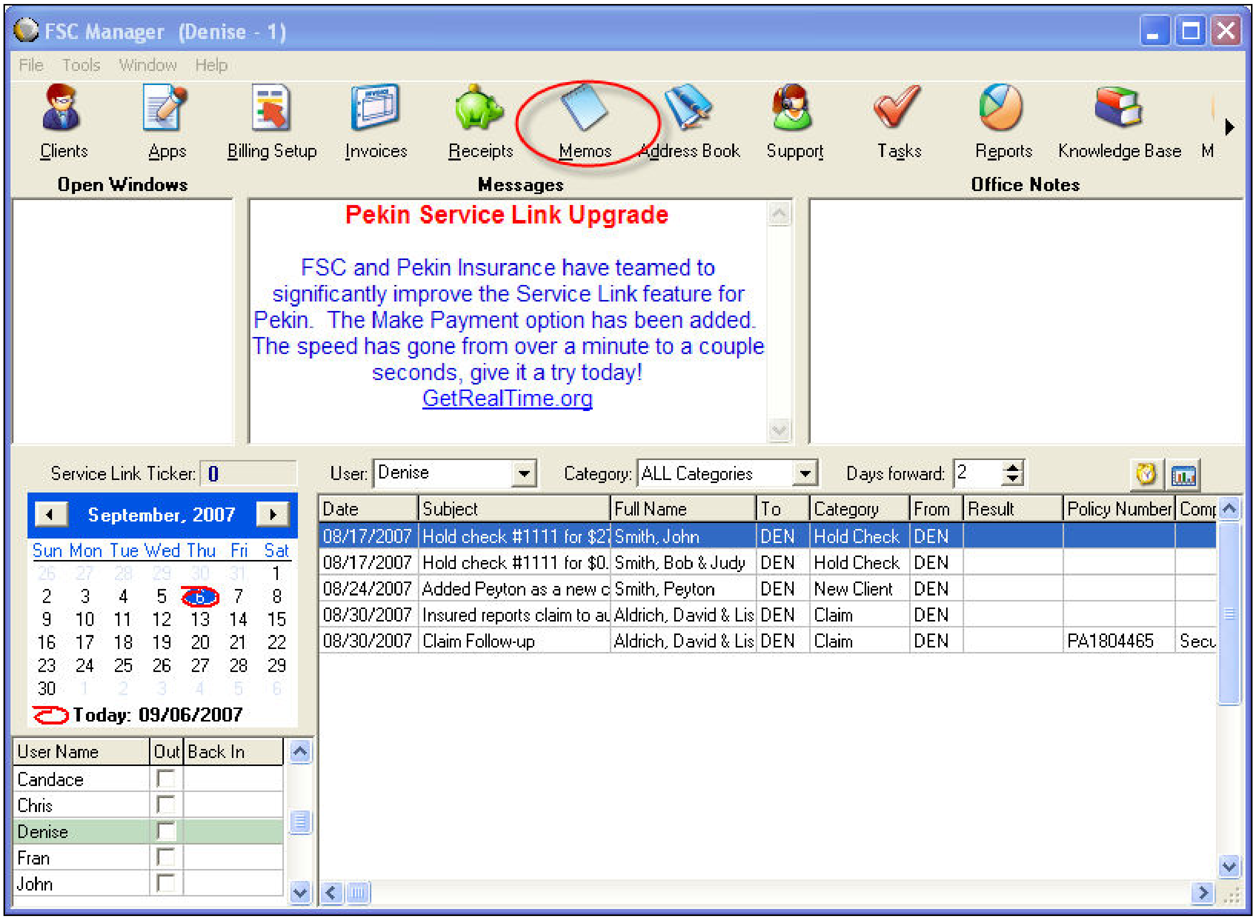


Figure 6: Memo Button on Banner

2. This will bring up the Memos Locater allowing users to search for a Memo. To search in this locater, type in the retrieval (name, subject, date) and hit enter. The wild card of .. will also work in this locater, but the user must hit enter for the search to execute.
3. Highlight the Memo and click *OK* or double click on the Memo to open.

## How to Create a Memo Template

Memo templates pre-designed Memos that can be selected and used by any user in the system. Agencies may want a specific layout or design to their Memo or there may be memos that are commonly used such as a FAX cover sheet or change request to a carrier. It is faster to use a template than to start a memo from scratch. A standard memo template will also make all correspondence sent to clients and carriers have a standard format. Only a level one user may create memo templates. The instructions are below.

1. Open a Memo from a Client screen.
2. Click the *Edit* menu on the Toolbar and select *Template List…*
3. A new box called *Templates* will open to the right of the *TO* field. Click the *New* button to start a new template.
4. In the memo text box, users may type data or insert merge fields. This whole process is similar to creating a mail merge document in Word.

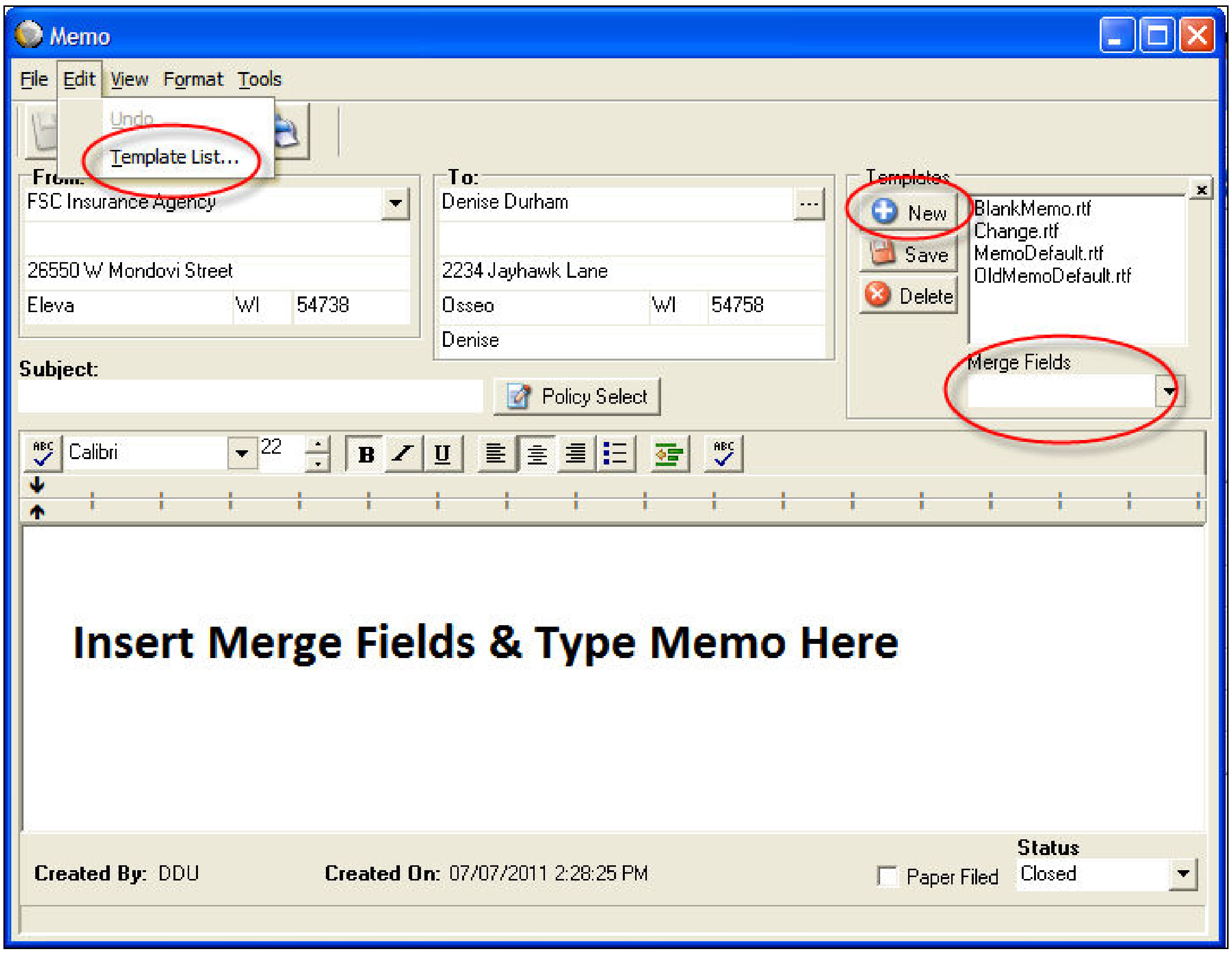


Figure 7: Memo Template Screen

5. To insert *Merge Fields*, place the cursor in the document where the merge field will be inserted. Go to the *Merge Fields* dropdown and select a field. Fields can not be added to the dropdown list by users. A completed template may look something like the example below. Merge fields are indicated by having an asterisk on either side of the field name.

*AgencyName*
*AgencyAddr1*
*AgencyAddr2*
*AgencyCity*, *AgencyState* *AgencyZip*

*ClientFirstName* *ClientLastName*
*ClientAddr2*
*ClientCity*, *ClientState* *ClientZip*

RE: *PolicyNumber*

Dear *ToName*

We are pleased that you have chosen FSC Insurance Agency to service your insurance needs.  Don't forget we also offer full financial planning services as well.  Please call us to find out how we can help you plan for the future.  Thanks again and we look forward to hearing from you

Sincerely

*User*
*AgencyPhone*

Figure 8: Memo body

6. Once the template is completed, click on Save under *Templates* in the upper right corner.
7. Give the template a name and *Save*.

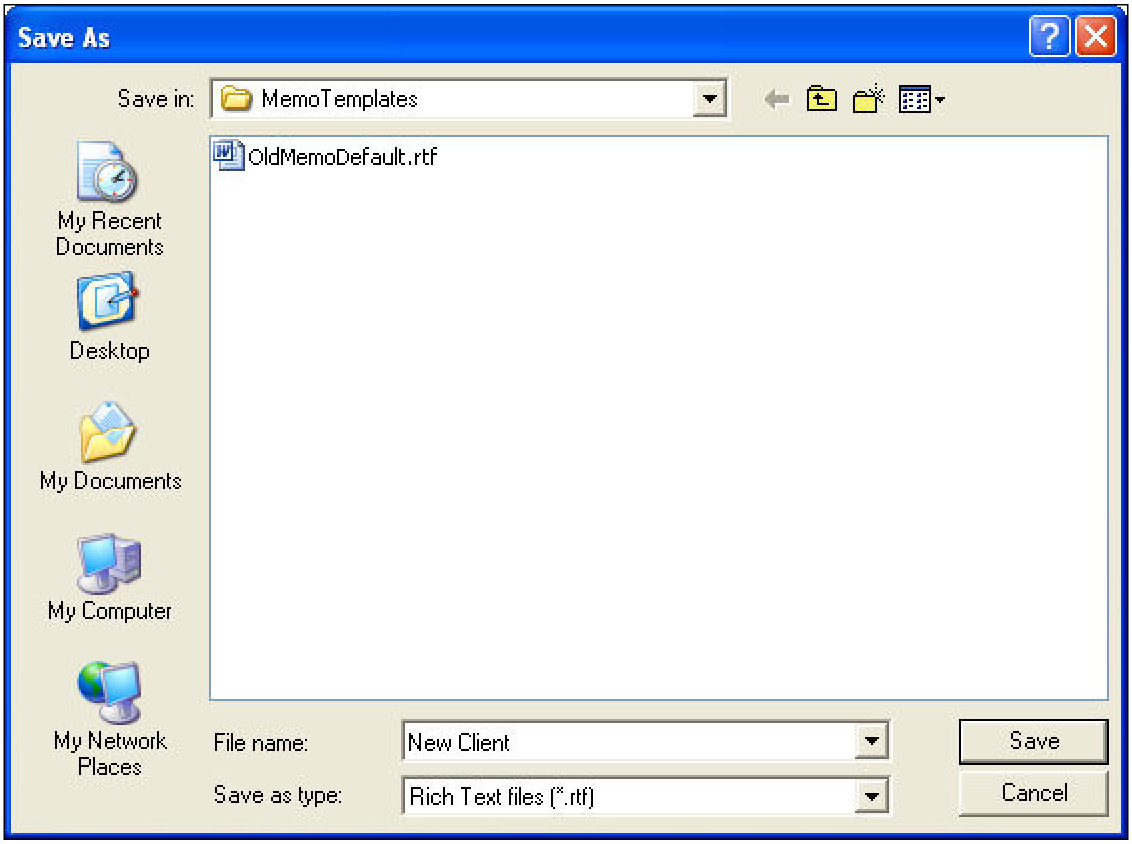


**Figure 9: Memo Save Prompt**

**8.** In the window under *Templates*, the new template will appear listed with the *OldMemoDefault*. It will also appear on the *Template* dropdown when users create new Memos.


**Figure 10: Memo screen/Templates**

## How to Secure a Memo

Users licensed for Life, Health or Securities will be able to secure Memos, so that only licensed users may view Memos related to that line of business. **To set security for Life, Health and Securities see Chapter 2 – System Setup.** Non-licensed users will not have access to secured Memos.

Memos created in the following ways will be secured automatically:

1. Create the Memo directly from the (secured) policy screen
2. Highlight the secured policy before creating the Memo
3. Use the *Policy Select* button in the Memo to select the secured policy

To Manually secure a Memo:

1. Open the Memo to be secured
2. Click the *Secure* icon
3. Select the security relation and click *OK*.

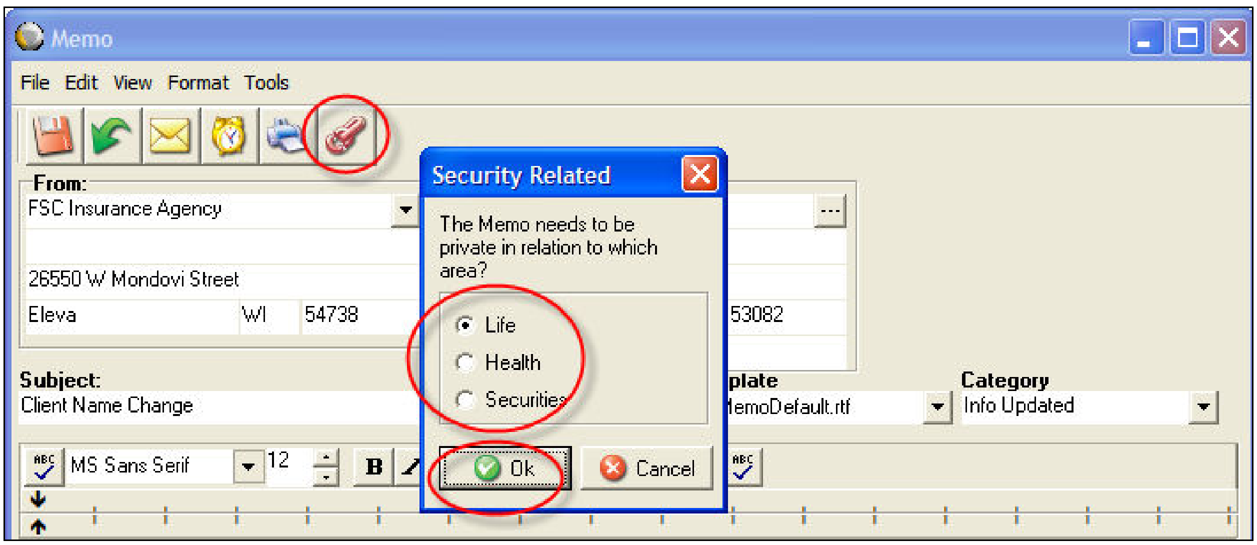


Figure 11: Secure Memo

## System Options

Memos have three *System Defaults*. Go to *System* on the Banner and click on the *System Defaults* tab. These are located in the *Memo Options* box. These defaults apply to all users.

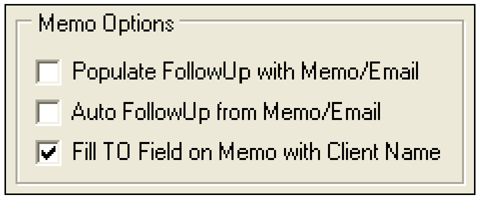


**Figure 12: Memo Options**

*Populate FollowUp with Memo/Email* - This option will generate an auto followup and populate the body of the followup with the body of the Memo that the user just created.

*Auto Followup from Memo/Email* – When this option is check marked, the system assumes that all users will automatically want to do a Follow Up after a Memo. When the user closes the Memo screen, the Follow Up screen will appear automatically. The user can cancel the Follow Up if necessary. This same option is available on the Local Settings tab as a per user setting.

*Fill TO field on memo with client* - When this option is check marked, the system will automatically pull in the client's name and address into the *TO* field of a memo when started from the Client screen.

Two of the options on the *System Defaults* tab are also available on the *Local Defaults* tab. This is so users can turn on the options individually rather than system wide. The two options are: *Auto Followup from Memo* and *Fill TO field on memo with client*.

# Obtaining Support

If you have any questions about this training, please contact FSC Customer Support. Thank you and enjoy using FSC Manager!

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