FSC Manager August Newsletter

Coming Soon

New Features under Construction

» **Updated Personal Home ACORD Application**
» **Commercial Business Auto Download** – This feature allows carriers to download commercial auto in the same way that personal auto is downloaded. We are in the process of testing and certifying carriers for this download.
» **Auto Follow-up System from Download** – This feature will allow for follow-ups to be sent to individuals based on a download transaction. (Example: If download receives a cancellation, a follow-up will be created for the CSR on the account.) There will be a setup screen that allows the follow-up to be sent to an individual user, the CSR on the client account, or randomly rotate it between a group of CSRs. There will be a different setup for each type of transaction: cancellation, renewal, new business, etc…

Version 7.1

This version is in the process of being released. Your agency will be notified via email to run the update. Please complete the update as soon as you can after receiving the email notification.

This update includes the following features:

» Updated Auto ACORD form
» New client screen layout
» Unlimited phone numbers for clients
» New fields on client screen: lead, business type, cross reference, secondary name
» Ability to create forms from the client screen in addition to the application screen
» New ACORD forms: Workers Comp First Report of Injury/Illness, SR-22, Agent of Record Change Request
» Search capability on the client screen
» Service Link daily counter and reports

Version 7.1 is a very large update taking between thirty minutes and three hours to process depending on the number of clients and applications in your system. Because of the extra time it may require, plan to run the update at an appropriate time. Running the update directly at the server will significantly speed up processing time.

Training Sessions

FSC will be offering two training sessions per week on version 7.1 for the next month. Please visit our training website to view dates and times and to register. Search for “Version 7.1”

https://fiservfsc.webex.com/mw0304l/mywebex/default.do?siteurl=fiservfsc&service=7

Make sure you are viewing the training sessions for **your** time zone. To change the time zone, click on the underlined words, select the correct time zone and click OK.

All training session times in: Central DT

FSC Rater RT

FSC Rater RT, our web-based, real-time comparative rating platform, is now live in Wisconsin! FSC Rater RT will be replacing MI-Rater in the Midwest over time. This platform provides carrier direct, real-time rates for those carriers that have it available, as well as manufactured rates for carriers that do not yet supply real time rates. Carriers are being added every two weeks, stay tuned for further information about FSC Rater RT!

Communication

Carrier Downloads

Several new carrier/Lines of business have been recently made available for download:
Buckeye Mutual – Personal Auto and Home
Merchants Insurance Group - Personal Auto, Home and Direct Bill Commissions
Preston Mutual – Personal Home
Preferred Mutual Insurance – Personal Auto and Home
Insurance Company of the West – Personal Auto

To add these carriers to your download, contact the carrier first to request the download. Then notify FSC Customer Service that you need the Company Info Setup completed.

We are currently working to certify the following carriers: American Modern, Commerce West, Legacy, Mercury and First American Property.

Service Link

Most agencies have been set up with Service Link. Please contact us if you still need to be set up. Below you will find a list of all the carriers that have Service Link available. If you see a carrier that you are not set up with, please contact us.

AAA of Michigan
Acuity
Allied
Auto-Owners
CHUBB
Cincinnati
EMC
Encompass
General Casualty
Germantown
Grange/Integrity
Great West Casualty
Grinnell
Harleysville
Hartford
Hastings Mutual
Hawkeye/Indiana
MetLife
Ohio Casualty
Pekin
Peerless
Progressive
Safeco
SECURA
State Auto
Travelers
United Fire & Casualty
West Bend
Westfield

Carriers highlighted in yellow are new to Service Link. Carriers highlighted in green indicate that the Service Link feature has been re-written to improve the speed of the inquiry. We are re-writing the Pekin Service Link inquiry now; it will be released by September 1st. Watch your email and the messaging window for further information.

Please jump on board the industry-wide GetRealTime campaign. This campaign is being driven by ACT with a goal to double real time usage in one year. Utilizing real time will encourage carriers and vendors to improve the real time capabilities, benefiting your agency in the long run. Visit GetRealTime.org for further information. Once your agency has updated to version 7.1, you will have the ability to run the Service Link Inquiries report to see how many transactions your agency and individual users are requesting each day, week or month. If Service Link is not working for a particular carrier, please contact FSC Customer Service for assistance.

Resource Groups

Resource Group meetings are regional user group meetings held in the Spring and Fall. These are a great place to learn about the newest features in your management system, meet and share ideas with other agencies using FSC Manager, and give input to FSC on what features are coming next. If you have not attended a Resource Group in the past and are interested in joining, please contact the Resource Group officer nearest you. For further information, click on the link below.

http://www.mi-assistant.com/miassistant/resource+groups/regions++groups/default.asp

Upcoming Meeting Dates:

Western Iowa – Tuesday, October 2nd
Eastern Iowa – Wednesday, October 3rd
Southern Minnesota – Tuesday, October 9th
Northern Minnesota – Wednesday, October 10th
Southern Wisconsin – Tuesday, October 16th
Illinois – Wednesday, October 17th
Western Wisconsin – Wednesday, October 24th
Eastern Wisconsin – Thursday, October 25th

From the Tech Support Archives

After running the 7.1 update, several agencies have called regarding the Client Screen toolbar. It appears that most of their toolbar is missing. What has happened is that a new icon has been added to the toolbar. If your client screen is not wide enough to accommodate the new icon, the whole toolbar disappears. It's a simple fix. Drag the edge of the client screen to make it wider by about half an inch. There's the entire toolbar! See examples of the toolbars below, yours should look like the bottom toolbar.

Peachtree 2008

FSC is currently testing FSC Manager integration with Peachtree 2008. We will notify agents in a future newsletter when testing is complete.

Scanned Signatures

FSC Manager supports inserting a scanned signature into an ACORD application or form. This is especially useful when a user wishes to email a document such as the Certificate or Binder which requires a producer signature. To set up scanned signatures follow the steps below.

1. Sign a piece of paper and scan the document
    a. When signing the paper, use a dark pen, sign in a straight line and keep the letters similar in scale to each other
    b. Scan the document and save as a monochrome bmp. If your scanner doesn't allow for this, scan and save as a jpg. Then open the jpg in Paint and save as a monochrome bmp
2. Load the signature into the FSC Manager. (Must be a level 1 user to do the remaining steps)
    a. Click on the [System] button on the Banner
    b. Go to the System Defaults tab
    c. Click the [Signatures] button

    d. Click the menu item Signature ->Insert from File
    e. Browse to find the bmp file created and saved in step 1 above and open it
    f. The signature will now display in the FSC Manager. Use the mouse to click and drag a box around the signature. Include the entire signature, but as little white space as possible around the signature
    g. Click on [Save Selection]
    h. Give the Signature a name and click [OK]
    i. Click [OK] to save signature
3. Assign the signature to a user(s)
    a. In the System Defaults, click on [Signatures] button
    b. Click the menu item Signatures->Authorization
    c. On the left, highlight the user
    d. On the right, select a signature name from the drop down
    e. Click the + button to add additional signatures to the same user
    f. Click [OK] to save assigned signatures
    g. Click [OK] to save settings

Now the signature is available for use for the authorized individuals. When opening an ACORD application/form, click on the Signature menu to select the appropriate signature to use. It will remember the last signature used on each form.

If you need assistance with setting up your scanned signature, please contact Customer Service.

Contacting Customer Service

Midwest: 800-401-2895
West Coast: 800-433-2550
Email: fscmanagersupport@fiserv.com