

## **FSC Manager**

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## Management System Training

Training is an on-going process. Agencies hire new employees, want to further their current knowledge of the system, and need to learn about new features. FSC will provide free, unlimited, comprehensive online training to your staff.

Agencies may receive individual training on the System Defaults, Download, and Quickbooks/Peachtree setup. Please contact us at 800-401-2895 to schedule individual training. The remaining training will be offered online in a group setting. Trainings are conducted via WebEx which allows the attendees to connect to the trainer's computer to watch the training session and via a toll free teleconference phone line.

Training sessions are held Tuesday through Thursday. Approximately three sessions are offered each day. Most sessions are one hour in length. Attendees must register at least one day in advance. Each attendee should register separately. Attendees will receive an email reminder twenty-four hours before their training session begins.

### How to Register for a Training Session:

1. Click [here](#) to view a complete list of training sessions in date order.
2. Make sure to view the sessions using your zone by clicking on the time zone option and selecting the appropriate zone for your agency.

All training session times in: [Central ST](#)

**Figure 1: Time Zone**

3. Click on the name of a training session to see more information about the training and to register for the training.
4. When you have registered, you will receive an email notification with the toll free number to join the teleconference along with a link to connect to the online training session.

FSC reserves the right to cancel/reschedule training due to insufficient registration, holidays or scheduling conflicts.

## Training Topics

### Clients/Applications

Clients and policies can be added to the system during the download process. However, a percentage of the data will have to be added manually. This training will cover the following:

- » How to add a client
- » Information that is available from the client screen
- » How to add an application/policy

### Tranlogs/Followups

Tranlogs are date and time stamped records which are permanently saved on a customer's file for E&O protection. Tranlogs are also required for an agency to switch to a Transactional Filing system. Follow ups allow users to create a reminder in the system that can be suspended for a future date. This training will cover the following:

- » How to create a tranlog record
- » How to add tranlog categories and default text
- » How to run reports on tranlogs
- » How to make follow ups
- » How to resolve follow ups

### Memos

Memos are correspondence to customers or carriers. Users may make a unique memo each time or use a saved template for commonly used correspondence. Memos can be printed or emailed from the system. This training will cover the following:

- » How to create a memo template
- » How to use a memo template
- » How to print/email a memo

### Forms

Forms include non-application ACORD forms such as changes, binders, claims, certificates, and cancellation requests. These forms are integrated with the policies entered in the system. This training will cover the following:

- » How to create various ACORD forms:
- » How to locate a form that was previously created
- » How to email forms and include a scanned signature

## Tasks

Tasks are important functions that keep the management system up-to-date and help prevent database corruption. This training will cover the following:

- » How to run tasks
- » Detailed descriptions of each tasks function
- » The importance of a backup system

## Reports

Reports allow a user to retrieve information from the management system to learn more about the agency's business. This training will cover the following:

- » Canned reports available in the system
- » How to design custom reports

## Single Letters

Single letters allow users to create form letters with Microsoft Word that will merge with data from the management system. These should be standard letters that do not require modification each time they are printed. This training will cover the following:

- » How to create a new single letter
- » How to modify an existing single letter
- » How to print an envelope/label for an individual client

## Marketing

A marketing letter can be any letter that needs to be sent to a group of people in the management system. These letters are set up as a mail merge between the management system database and a Microsoft Word document. This training will cover the following:

- » How to create a marketing letter
- » How to remove people from the marketing log to reprint letters
- » How to print mailing labels

## Proposals

Proposals are documents that can be created by merging a pre-set Microsoft Word document with application information entered on the client's account. This document can be utilized as presentation for new clients or as a review tool for existing clients. This training will cover the following:

- » How to create a new proposal
- » How to modify the proposal
- » How to modify the proposal templates

## Imaging/Efiling

This training will explain how to link digital photos, scanned documents, and downloaded/emailed documents to a customer file.

- » Discuss the difference between imaging and efile
- » How to efile
- » How to attach an image directly to a client file

## Direct Bill Commissions

This is a new feature available in version 6.2.0.22. This area deals with managing downloaded commissions and manually entering commissions directly from the carrier commission statement. This method can be used by agencies that pay producers on commissions, but **do not** want to reconcile their commission statements. This training will cover the following:

- » How to manage the downloaded commission information
- » How to manually enter a commission statement
- » How to pay producers on direct bill commissions
- » How to run reports on direct bill commissions

## Agency Bill Beginning Balances

This training is for agencies that have never used the policy accounting system or for agencies that have attempted to use the policy accounting system, but need to adjust client balances. This method of adjusting client balances should only be used prior to beginning any integration with Quickbooks/Peachtree. This training will cover the following:

- » How to enter a beginning balance on a customer
- » How to make an adjusting entry to a client that has an incorrect balance
- » How to print a report of all client balances

## Agency Bill and Direct Bill Invoicing

This training is necessary for agencies who wish to track their accounts receivable in the management system. This training is also necessary for any agency who wishes to compare their direct bill invoices to their company statements to reconcile or make certain that the company did not make a mistake on their statements. This training is approximately two hours in length and will cover the following:

- » Review of all fields in Billing Setup
- » How to do first time billing on new policy
- » How to process renewal invoices
- » How to do an endorsement
- » How to enter payments on agency bill policies
- » Review of tasks and reports as they relate to agency and direct bill accounting

### Commission Reconciliation

Pre-requisite: Agency Bill and Direct Bill Invoicing training. Agency must invoice policies for approximately 2-3 months in order to reconcile a commission statement. This training will cover the following:

- » How to reconcile an agency bill or direct bill commission statement
- » How to pay a producer based on reconciled commissions
- » How to run reports on reconciled commissions

### General Knowledge

This training is a review of general knowledge, commonly asked questions, and shortcuts. These tips will help save time throughout the day. This training will include the following:

- » How to move your icons on the Banner
- » How to use the calendar/office notes
- » How to locate a client/policy that is missing
- » How to delete a client
- » How to move an application from one client to another
- » How to view the history of a client/policy
- » How to log someone out of the system
- » How to "jump" from your follow ups into the client/policy
- » How to expand a field for additional data
- » What is the "tag" field commonly used for
- » Where are restaurant and contractors supplements and the professional liability form
- » How to print a list of certificate holders

## Obtaining Support

If you have any questions on registering for training, please contact FSC Customer Support.

### FSC Insurance Solutions

Phone: 800-401-2895

Email: [support@mi-assistant.com](mailto:support@mi-assistant.com)

Hours: 8:00 a.m. to 5:00 p.m. CST