MS FLEX

STRENGTH. FLEXIBILITY. RESULTS.

MS FLEX - CUSTOMER RELATIONSHIP MANAGER (CRM) - GETTING STARTED

Contents

LOGGING IN

1. Access the system using the provided web-link. If you do not have this link, contact your administrator, or support representative.

The Login screen will show

2. Enter your provided user name (not case-sensitive)
3. Enter your password (case-sensitive)
4. Type in the code shown
5. Click Log In

A prompt may appear asking you to confirm that you accept the Terms and Conditions for the site. You can view these by clicking "I have read and accept the Terms and Conditions".

If you do, click OK

A prompt may appear asking for a code that has been sent to your email address. Check your emails and enter the code sent. If correct you can log in.

The main screen will appear

Note Your password must match certain requirements, namely

- Should have at least 8 characters
- Must not include your user name
- Have at least 1 number
- Have at least 1 upper-case character
- Have at least 1 lower-case character
- Have at least 1 special character from the list below
  #$^,.+=!*()@%&

NOTE your browser Settings > Language should be set to English to ensure that all date fields show dates in a consistent way

MANAGING CLIENTS

Once on the main screen you can search, view, edit and add new clients

SEARCH FOR A CLIENT

1. Enter partial details (name or NIE) in the field "Enter text to search clients..."
2. Press Enter

The client list is filtered based on your search text

Click the required client to select them, their details can be viewed under the various tabs on the right

VIEWING RECENTLY VIEWED CLIENTS

Right-mouse over the Clients grid and choose "Most Recent (Active)"

The list shows the most recently viewed clients, with the most recently viewed at the top.

Select a name and that client will be highlighted in the Clients grid

EDIT A CLIENT'S DETAILS

1. Search for and select the required client
2. Click the "Client Details" tab on the right
3. Change their details as required. Note that the fields with a yellow triangle are required

   Note :

   - NIE must be 1 letter, followed by 7 numbers and 1 letter
   - Email address(es) if supplied must be valid. Separate multiple email addresses with ;
   - If the NIE number has been changed, it cannot equal an existing NIE

4. Click "Update"

To Change a Client's Date Of Birth

To change a client's Date of Birth you can select from the date of birth drop list or simply enter their date of birth directly, e.g. Type in

29 Oct 1962

then tab off the date of birth field.

Note if your browser is set to Spanish enter

29 Oct. 1962

ADD A NEW CLIENT

1. Click the menu item $\boxed{\text{Add New Client}}$ at the top of the screen

2.Enter the new client's details as required.

Note :

- Fields with a yellow triangle are required
- NIE must be 1 letter, followed by 7 numbers and 1 letter
- Email address(es) if supplied must be valid. Separate multiple email addresses with ;
- The new NIE number must not equal an existing NIE

3. Click $\boxed{\text{Save}}$. The "No. Added" count increases by 1

4. Repeat steps 2 and 3 for any additional new clients as needed

5. Click $\boxed{\text{Close}}$.

The client list should now include your newly added client(s).

You could use:

Search (see p.5) to find your new clients

or

Right-mouse over the Clients grid and choose "Group/UnGroup by Date Added" to group clients by the year/month they were added.

See Add New Policy (p.7) to add the new client's policies

To Add a Client's Date Of Birth

To add a client's Date of Birth you can select from the date of birth drop list or simply enter their date of birth directly, e.g. Type in

29 Oct 1962

then tab off the date of birth field.

Note if your browser is set to Spanish enter

29 Oct. 1962

MANAGING POLICIES

Once on the main screen you can search, view, attach documents, add, edit, renew, cancel and un-cancel policies

You can also RENEW, ADD or CANCEL from the Search menu at the top of the screen.

SEARCH FOR A POLICY

Method 1 - For selected client

Once you have selected the required client, their policies are shown under the Polices and Claims tab.

1. Enter partial details in the field "Enter text to search policies…"
2. Press Enter

The selected client's policies are filtered based on your search text

Method 2 for all clients/policies

1. Click the Search menu at the top of the screen
2. Enter text you want to search for in the field "Enter text to search…"
3. Press Enter

The entire active client's details and all policies will be searched.

To search inactive clients

1. Choose the menu ***Configure > Lists > Inactive Clients and Policies***
2. Enter text you want to search for in the field "Enter text to search…"
3. Press Enter

To search all clients (active and inactive)

1. Choose the menu ***Configure > Lists > Search All Clients and Policies***
2. Enter text you want to search for in the field "Enter text to search…"
3. Press Enter

Sorting in the Search screen

Note you can also sort in the Search screen by clicking a column heading. First click will sort the column in ascending order. A second click will sort in descending order.

ADD NEW POLICY

1. On the main screen – "Policies and Claims" tab, for the required client, click Add Policy or Add New Policy. The Add Policy screen appears.
2. Enter the new Policy Number
3. Select the Policy Company
4. Enter the premium (if known)
5. Enter the Effective Date
6. Enter the Expiry Date
7. Enter a Description
8. Enter Notes
9. Click ADD POLICY

To add additional details to the policy, attach documents etc. see "View Policy Details and Attach Document(s)" below.

You can also add a new Policy when you add a new client via "Add New Client" on the toolbar.

CANCEL A POLICY

For active policies…

1. On the main screen, for the required client and required policy click Cancel. The Cancel Policy screen appears.
2. Enter the date of cancellation
3. Enter the reason for cancellation
4. Enter Notes
5. Click CANCEL POLICY

See Reinstate a Policy (p 9) to make a policy active again

RENEW A POLICY

1. On the main screen, for the required client and required policy click Renew. The Renew Policy screen appears.
2. Enter the renewal FROM and renewal TO dates. Note these will automatically show the dates calculated based on the existing expiry date. If these have been calculated based on the existing expiry date the dates are shown in red. You can still change these if required.
3. Enter the new premium as supplied by the policy company
4. Enter any adjustment as a percentage
5. Click CALC to calculate the adjusted premium (Supplied Premium MINUS adjustment)
6. Enter Notes
7. Click RENEW POLICY

MOVE A POLICY

To move a policy from 1 client to another

1. For the client to move FROM, select the policy to move and click View
2. Click Move To …
3. A list of clients is shown, excluding the current client
4. Select the client who should receive the current policy
5. Click Move

The policy is moved to the selected client

RENAME A POLICY

To rename a policy

1. Click "Rename Policy No." on the top menu
2. Select the policy to be renamed. You can filter by typing
3. Enter the policy's new name. You can filter by typing
4. Click Rename

VIEW POLICY DETAILS AND ATTACH DOCUMENT(S)

For the required policy, under the Policies tab click the View link to view further details

You can edit the form and then Save, then choose Close

To attach document(s)

1. Click the "Attached Documents" tab
2. Browse for the file(s) - note only PDFs can be added
3. Click Upload

Note that attached documents contents can also be viewed from the here by clicking the document link

Also, documents can be viewed under the "Documents" tab for the selected client. To view any document, click the relevant link

Note a count of attached documents for each client is shown under the paper clip on the Client list

Make sure that files to be attached are virus-free and are not already encrypted.

Once uploaded verify that the document(s) can be viewed OK.

REINSTATE A POLICY

For cancelled policies you can reinstate these (makes them active again)

1. For the required client and required policy click View
2. Drop the date calendar and Clear the Cancellation Date
3. Clear the Cancellation Reason
4. Choose Save
5. Choose Close

See Cancel a Policy (p 8) to make a policy cancelled

USING THE MERGE AND SEND EMAILS TAB

Note that the standard signature image is always attached at the end of all emails - this is shown on page 2.

To alter this image please contact your Support Representative.

TO SEND A BASIC EMAIL

1. Select the required Client using search etc. (See p 5)
2. Click the "Merge and Send Emails" tab
3. Click New Email if necessary and if you wish to start from a blank email
4. Type in your email text. You can also paste email text into the Email area from Word for example
    1. Click the email area so the cursor is visible
    2. To paste text into the Email area at the cursor position

        Click the "Paste from Word" toolbar button or

        Use Ctrl + V (Windows shortcut for Paste)

5. Verify the recipient's email address at the "To" field is correct. The recipient email is taken from the "Client Details" tab for the selected Client

6. Click Send

TO SEND AN EMAIL BASED ON A TEMPLATE

1. Select the required Client using search etc. (See p 5)
2. Click the "Merge and Send Emails" tab
3. Select the required Email Template from the "Template" drop-list
4. Select the policy that the email relates to under “Policies”. This is so policy related merge fields can be filled-in when you Merge
5. The template text will appear in the Email area. Merge fields are shown surrounded by { and }. For example {ClientName}
6. Click Merge. The merge fields will be replaced. Check the email contents. Note that there may be additional merge fields at the bottom on the email e.g. {AdminLongName}

6. Verify the recipient's email address at the "To" field is correct. The recipient email is taken from the "Client Details" tab for the selected Client

7. Click Send

TO ATTACH FILE(S)

For the selected client, any files attached to the client are shown on the "Merge and Send Emails" tab next to "Attach". These are taken from any documents attached to the client via

- Adding Tracks and Items
- Sub-forms via "Policies" tab, View, Attached Documents
- Or any shared documents that have been configured. (See p 13)

You can select any of the documents and they will be attached to the email (See p 10)

TO ALTER AN EXISTING EMAIL TEMPLATE

To Alter an Existing Template

1. Choose a client using search etc. (See p 5)

2. Click the "Merge and Send Emails" tab

3. Make the template to be altered visible by selecting from the "Template" drop-list.

The template text is shown in the Email area.

Make sure it is in before-merge state (i.e., merge fields such as {ClientName} etc. are visible.

4. Alter the email text formatting, wording etc.

5. Add any additional merge fields where required by choosing from Merge drop-list and clicking the down arrow next to Merge

6. Choose Save Template

The template will be modified

TO CREATE A NEW TEMPLATE

You can create a new Template by:

- Basing it on an existing template
- Typing into the blank email area (click New Email to clear the Email area)
- Pasting email text into the Email area from Word for example
    1. Click the email area so the cursor is visible
    2. To paste text into the Email area at the cursor position

        Click the "Paste from Word" toolbar button or

        Use Ctrl + V (Windows shortcut for Paste)

E.g., Creating a new template based on an existing template

1. Choose a client using search etc. (See p 5)

2. Click the "Merge and Send Emails" tab

3. If basing your new template on an existing template, select a suitable starting template (choose one as close as possible to the new template design) by selecting from the "Template" drop-list.

The template text is shown in the Email area.

Make sure it is in before-merge state (i.e., merge fields such as {ClientName} etc. are visible.

4. Alter the email text formatting, wording etc.

5. Add any additional merge fields where required by choosing from Merge drop-list and clicking the down arrow next to Merge

6. Next to "Template" type in to change the template description

7. Choose Save Template

The new template will be created and is available for selecting

TO VIEW OR RESEND SENT EMAILS

You can view emails you have sent (subject to access rights) via

Configure > Lists > All Sent Emails

You can also resend emails shown on this screen by choosing Resend

Choose “Show Preview” on the toolbar to see the email content as sent

TO CUSTOMISE EMAIL SIGNATURES

Go to ***Configure > Emails***

Enter the name of the image for the signature image. This can be organised by your support representative

Change the test/formatting of the “Privacy and Confidentiality Clause” as required. Choose Save

Emails will show the image and then the Privacy and Confidentiality Clause at the end of each email.

USING DOCUMENTS

Any number of documents (PDFs only) can be attached to client policies.

If you do not have a PDF version of a file that you wish to attach, contact your Support Representative.

Note that previously attached (or shared, if available - see p. 13) documents can also be attached to emails via the "Merge and Send Emails" tab for the required client.

Always verify that the files appear correctly and can be viewed.

TO ATTACH A DOCUMENT TO A POLICY

1. For the required client and required policy on the "Policies" tab, click View

2. The policy details are shown. Select the "Attached Documents" tab. Any previously attached documents are shown listed - you can click each one to view the document contents

3. Choose Browse...

4. Select the file(s) to be attached. Not that only PDF files will be uploaded.

5. Click Upload

6. The file(s) will be uploaded and will show in the list of attached documents

Make sure that files to be attached are virus-free and are not already encrypted.

Verify that the files appear correctly and can be viewed.

TO VIEW ATTACHED DOCUMENTS

You can view attached documents via

- Click the View link on the "Policies" tab for the required client and policy then the "Attached Documents" tab
- Choosing the "Documents tab" for the required client
- Shared documents (see p. 13) can also be viewed via ***Configure > Lists > Shared Documents***

USING SHARED DOCUMENTS

Once a document has been attached to a policy it can be made shared so it can be attached to any client via the "Merge and Send Emails" tab, for example a generic introduction to the company, bulletins etc.

To make an attached document shared

1. For the required client, click the "Documents" tab

2. For the document to be shared, click the paper clip if available. The document is shared and will now be available for all clients via the "Merge and Send Emails" tab as an attachment

To view shared documents

If available, go to ***Configure > Lists > Shared Documents***

MOVING POLICY DOCUMENTS TO A DIFFERENT POLICY

- Click the View link on the "Policies" tab for the required client and policy then the "Attached Documents" tab
- Under the documents grid (with sufficient rights) you see Move all Policy Document(s) To...
- Select the policy to receive the documents
- Choose Move
- The documents will be moved to the selected policy

This can be used to prepare a policy for deletion, or for renaming

RENEWALS

By importing the renewals CSV file from an insurance company, you can process renewals manually or in bulk (automatically), which updates the relevant client's policy record and can email the client with renewal details.

If the client decides not to renew you can cancel the policy with the appropriate cancellation date and add relevant notes. See CANCEL a policy - page 8.

If you want to exclude a policy from automatic renewal see DISABLE/ENABLE a Policy from being automatically renewed - page 15

TO PROCESS RENEWALS MANUALLY

1. Import the latest Renewals CSV file using ***Configure > Import***
   a. You cannot import a file with a name that you have previously uploaded. It is recommended that you suffix the CSV file with today's date e.g. `RENEWALS_2023_09_13.csv`
   b. Supply a meaningful description when you upload so you can identify uploaded records easily.
2. Via ***Renewals > Process Renewals*** work through the list of renewals (shows where Effective Date is greater than or equal to today's date) clicking Policy Renew next to the relevant renewal record
3. On the renewal screen for the single renewal update the policy record complete any gaps and choose Update. This will either update the clients personal details (e.g. Email Address or Language) or the clients policy details e.g. Policy Payment Method)

Once all gaps are (if necessary) completed choose Renew... and choose OK to "Are you sure you want to renew this policy?"

This will update the policy record and add to this client's premium history (see page 16.)

The Email tab becomes enabled where you can see the wording for the renewal email.

Check the wording and the email address and choose Send Email

If no template can be found for the current product and language, then the email wording will say that the template cannot be found. The expected name of the template is shown.

TO PROCESS RENEWALS IN BULK

1. Import the latest Renewals CSV file using ***Configure > Import*** after having imported the latest Policies In Force file
   a. You cannot import a file with a name that you have previously uploaded. It is recommended that you suffix the CSV file with today's date e.g. `RENEWALS_2023_09_13.csv`
   b. Supply a meaningful description when you upload so you can identify uploaded records easily.
2. Via ***Renewals > Process Renewals*** Choose Prepare for Renewal. This sorts the renewals based on Effective Date, excludes renewals where email address is blank and excludes renewals which have already been emailed. The relevant renewals will be ticked and the total shows how many renewals would be processed if you choose Renew All Selected.
3. On choosing Renew All Selected the renewals will be processed where they have been ticked after choosing Prepare for Renewal.

Note there may be 100s of renewals to process. Each one takes about 20 seconds to process so a lot can take several hours.

Instead you can filter the grid then select visible rows only. Process those then refilter etc.

It is important that you do not abandon the renewal and attempt to start again as you risk sending duplicate renewal emails.

IDENTIFYING ISSUES

On ***Renewals > Process Renewals*** any issues found with the renewal data are shown in the "Is Issue" column.

"Is Issue" examples.

"Check Name"

"Check Name" means that the import file name may not match the stored name. This is usually because the stored name contains an apostrophe (e.g. O'Leary) whereas company CSV files do not record apostrophes. Alternatively, it may be because the stored surname has a training space which can be easily remedied by editing the client's name. See Edit Client Details - page 5.

"Policy Not Found"

The policy number in the import file was not found in the system. You may need to add a new person and add the policy. Possibly this can be remedied by importing a "Policies In Force" CSV via ***Configure > Import***

TO VIEW SENT RENEWAL EMAILS OR RESEND RENEWAL EMAILS

Choose the menu ***Configure > Lists > All Sent Email***

All emails are shown. Choose the Show/Hide Preview button to display/hide the email wording exactly as sent (apart from the email signature area)

You can filter the emails using the normal column filters. E.g. to show emails from or to certain addresses

The "Failed Emails" column shows any emails that couldn't be sent to

To resend an email click Resend Email next to the email to be resent. When resent the email "Notes" column shows when the email was resent and by whom.

TO DISABLE/ENABLE A POLICY FROM BEING AUTOMATICALLY RENEWED

To Prevent a policy from being Renewed Automatically (Disable)

1. Locate the policy you want to exclude from automatic renewals
2. If visible, click the link Do Not Renew
3. The check box under "Do Not Renew?" becomes ticked showing that this policy will be excluded from automatic renewals

To Enable a policy to be Renewed Automatically (when already disabled)

1. Locate the policy you want to include in automatic renewals
2. If visible, click the link Allow Renew
3. The check box under "Do Not Renew?" becomes un-ticked showing that this policy will be included in automatic renewals

TO CREATE A NEW TEMPLATE FOR RENEWALS

1. Using SharePoint view the latest template for the relevant Product, Language and Bank/Non Bank and make any changes if necessary.
2. Select all (CTRL+A) the text and copy (CTRL+C) the template text.
3. In the **desktop version** of Word, in a new document paste (CTRL+V) the template text.
4. Select all (CTRL+A) the text In Word and copy (CTRL+C) the template text.
5. In CRM go to "Merge and Send Emails" tab. (The client selected is not relevant)
6. Choose "Paste from Word" from the toolbar or use (CTRL+V) to paste the text into the blank email area.
7. Edit or add the required Template Name next to "Template"
   e.g., "`Home English Bank`".
8. Choose Save Template

Note if you skip steps 3 and 4 and try to paste directly from SharePoint (steps 1,2,5,6,7,8) into CRM then **<u>the template won't merge correctly</u>**.

The Template can then be used to merge Renewal emails and will be automatically found.

Ensure that all merge fields are surrounded with { and } e.g. `{PolicyNumber}` and have no spaces.

See below for merge fields.

Template merge fields

This Merge Field	**Shows This**
`{AdminLongName}`	The current operator's long name. Useful for personal signatures
`{AdminNotes}`	The current operator's notes. Useful to add custom text
`{AdminOfficeDetails}`	The current operator's office. Useful for personal signatures
`{ClientName}`	The client's name
`{CurrentExpiryDate}`	The active policies Expiry Date
`{Description}`	The description for the policy e.g., car registration, Building, Contents etc.
`{ExpiryDate}`	The active policies Expiry Date
`{FirstName}`	The client's first name
`{Greeting}`	The client's first name
`{NoOfPayments}`	The active policies Number of payments per year
`{NumberOfPayments}`	The active policies Number of payments per year
`{PaymentMethod}`	The active policies payment method
`{PersonForename}`	The client's first name
`{PersonName}`	The client's name e.g. John Smith
`{PolicyNumber}`	The active policies policy number
`{Premium}`	The active policies premium
`{ProductType}`	The active policies product type
`{RenewalDate}`	The active policies renewal date

VIEWING PREMIUM HISTORY

Go to ***Reports > Renewals > Premium History*** to see a history of premium changes (and therefore renewals)

IMPORTING GENERAL DATA

Using ***Configure > Import*** you can import a file (CSV type) to add or update details.

TO IMPORT

1. ***Configure > Import.***
2. Enter a description for the import. This is so you can locate records imported later on when viewing what records have been imported.
3. Select the file (must be a CSV file type)
4. Choose Upload and Import

The type of import is determined automatically from the structure of the CSV file (its headings)

Note that the same file name cannot be uploaded more than once. It is recommended that you add a suffix to the filename showing the date.

For example, rename RENEWALS.CSV to RENEWALS_2023_09_14.CSV

A lot of records may take several minutes to upload, Watch for the completion message on the screen.

If an error occurs, the error will be shown on the screen.

If an error occurs in the case of renewals all imports from this file will be undone, pending a re-import.

IMPORT TYPES

The type of import is determined automatically from the structure of the CSV file (its headings)

Renewals Imports

The CSV is identified as a renewal import automatically

After import, you can see what records have been imported via ***Renewals > Process Renewals***

Policies In Force Imports

The CSV is identified as a policies-in-force import automatically

This import can

- Update Personal Details (such as NIE, Telephone number if currently blank, address if currently blank).
- Add New Personnel.
- Add new Policies.
- Update Policies (such changing policy descriptions)

After import, you can see what changes were made during the import via ***Reports > Imports > Policies In Force Changes***.

Some rows will show as INFO such as when a potential surname mismatch is found. Red highlights should be investigated to see what the anomaly is.

APPENDIX 1 – MANAGING GRIDS

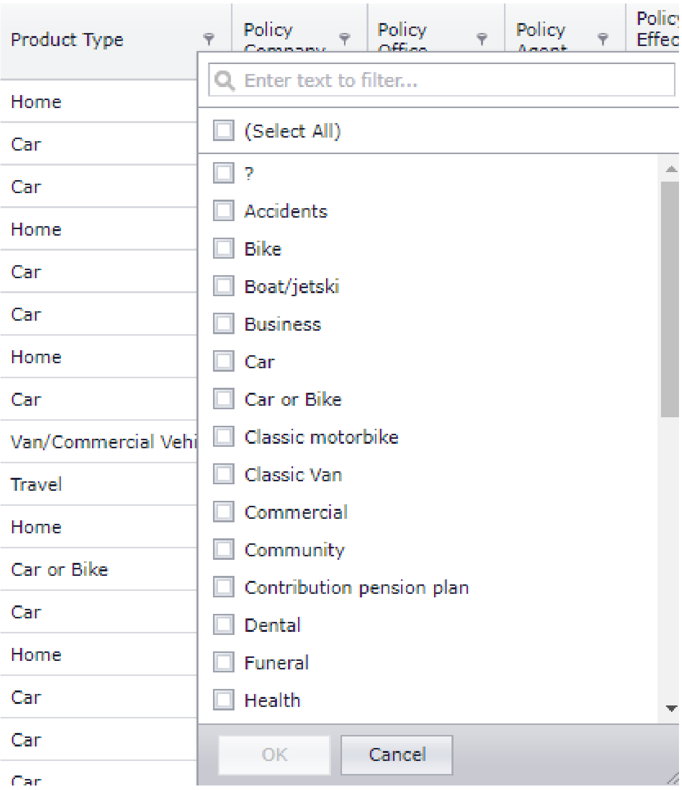
APPENDIX 1 – MANAGING GRIDS - FILTERING DATA

Much information is displayed in a grid layout.

Grids have column headings which describe what the column shows.

On these headings there is generally a filter icon as below

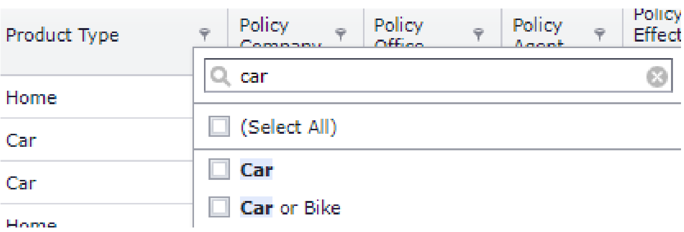
Clicking the filter icon shows a unique list of the contents of the column.



You can then tick one or more of the unique list shown in order to filter the column by those selections

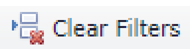
Once a filter is active the filter icon changes to red so you know that the grid is filtered

You can also type directly into “Enter text to filter…” to filter by any text you wish, for example Car might show



If you filter an additional column the filter gets added to the filter in force

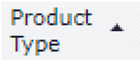
To clear a filter, click the filter icon and choose (Select All) or (if available) click the toolbar button



APPENDIX 1 – MANAGING GRIDS - SORTING DATA

To sort data in grids, click the column heading once to sort in ascending order than again to sort in descending order.

Once clicked you see the sort icon ▲ (ascending order)



Click the heading again to see the descending order sort icon ▼

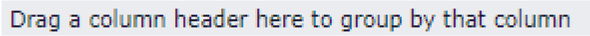
To clear sorts click the toolbar button

APPENDIX 1 – MANAGING GRIDS – REARRANGING COLUMNS

In grids you can rearrange columns by dragging them to the left or right

APPENDIX 1 – MANAGING GRIDS - GROUPING DATA

If a grid shows an area at the top labelled



Then you can drag a column header to this area and the grid becomes grouped by that column

E.g. below Product Type was dragged to the group area

This then shows

Expand any group to see the grid rows that belong to that (in this case) Product Type

The Grouped header can itself be filtered and sorted.

Additional columns can also be grouped to show groups within groups

E.g. below shows grouping by Policy Company THEN BY Product Type

Note that Policy Company and Product Type are also both filtered.

APPENDIX 1 – MANAGING GRIDS – SAVING AND REUSING LAYOUTS

TO SAVE A LAYOUT

Saving a layout saves any current

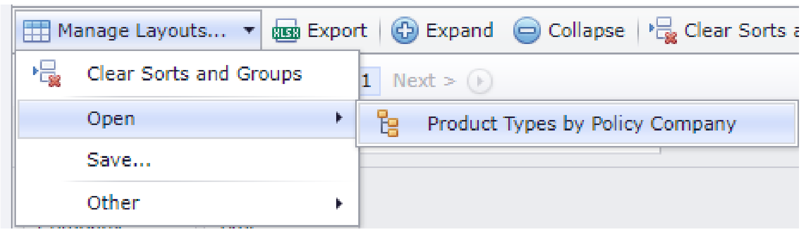
- Filter(s)
- Sort(s)
- Group(s)
- Column order

If you want to save a layout for future use, choose the toolbar menu

Then choose Save and give the layout a name (E.g. "Product Types By Policy Company")

TO OPEN A LAYOUT

To open a saved layout choose Manage Layouts then Open and choose your saved layout as below



OTHER LAYOUT OPTIONS

Under Manage Layouts you can choose Other. You can then:

- Deactivate previously saved layouts.
- Reactivate previously deactivated layouts.
- Deactivate All previously saved layouts.
- Show or Hide columns and save to a layout.