




HUG Resource Library

Correspondence Templates/Lists/Tips & Tricks

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Today's Agenda

- Introduce the Template Library, a HUG shared resource
- Customizing the documents that you copy into your correspondence templates to make them your own

This is a beginner/intermediate class. However, everyone is welcome because we encourage everyone to contribute their knowledge and questions during this session!

What is a Template Library?

There are many areas of CMS that allow you to create templates once that can be used throughout the system - letters, emails, text messages, action lists. Some of these are pre-filled, but can be tailored to your needs, and some are empty.

Instead of having to come up with these all on your own, some of the HUG member users have contributed their template information to a repository on the HUG website for you to use.

How do I access the Template Library

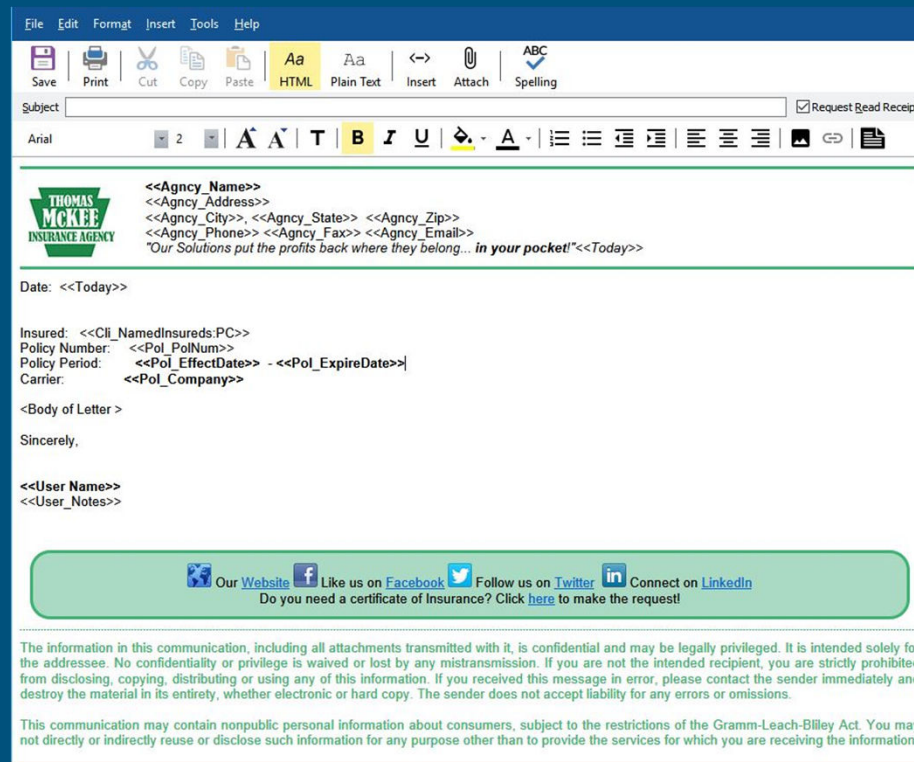
1. To access this information, you must be a member of HUG.
2. You need to create a members-only login (this is per user) on the HUG website and have this be approved by our website administrator
3. Templates are located at www.hawksoftusergroup.org
 - a. Go to the menu Resources -> Members-Only-> CMS Templates
 - b. Click on the button for the type of templates (e.g. Letter and email)




Customizing YOUR templates

- Creating a Base Template for your Agency
 - Make it fancy - inserting images and logos
 - Letter case - do you like your letters saying, "Dear LINDA"?
 - Your John Hancock - getting your own signature into the letters
 - Email disclaimer

Sample Base Email Template



The screenshot displays an email client interface with a menu bar (File, Edit, Format, Insert, Tools, Help) and a toolbar containing icons for Save, Print, Cut, Copy, Paste, HTML, Plain Text, Insert, Attach, and Spelling. The subject line is empty, and the font is set to Arial, size 2. The email body contains the following text:

 <<Agency_Name>>
<<Agency_Address>>
<<Agency_City>>, <<Agency_State>> <<Agency_Zip>>
<<Agency_Phone>> <<Agency_Fax>> <<Agency_Email>>
"Our Solutions put the profits back where they belong... in your pocket!"<<Today>>





Date: <<Today>>

Insured: <<Cli_NamedInsureds.PC>>
Policy Number: <<Pol_PolNum>>
Policy Period: <<Pol_EffectDate>> - <<Pol_ExpireDate>>|
Carrier: <<Pol_Company>>

<Body of Letter >

Sincerely,

<<User Name>>
<<User_Notes>>

 Our [Website](#)  Like us on [Facebook](#)  Follow us on [Twitter](#)  Connect on [LinkedIn](#)
Do you need a certificate of Insurance? Click [here](#) to make the request!

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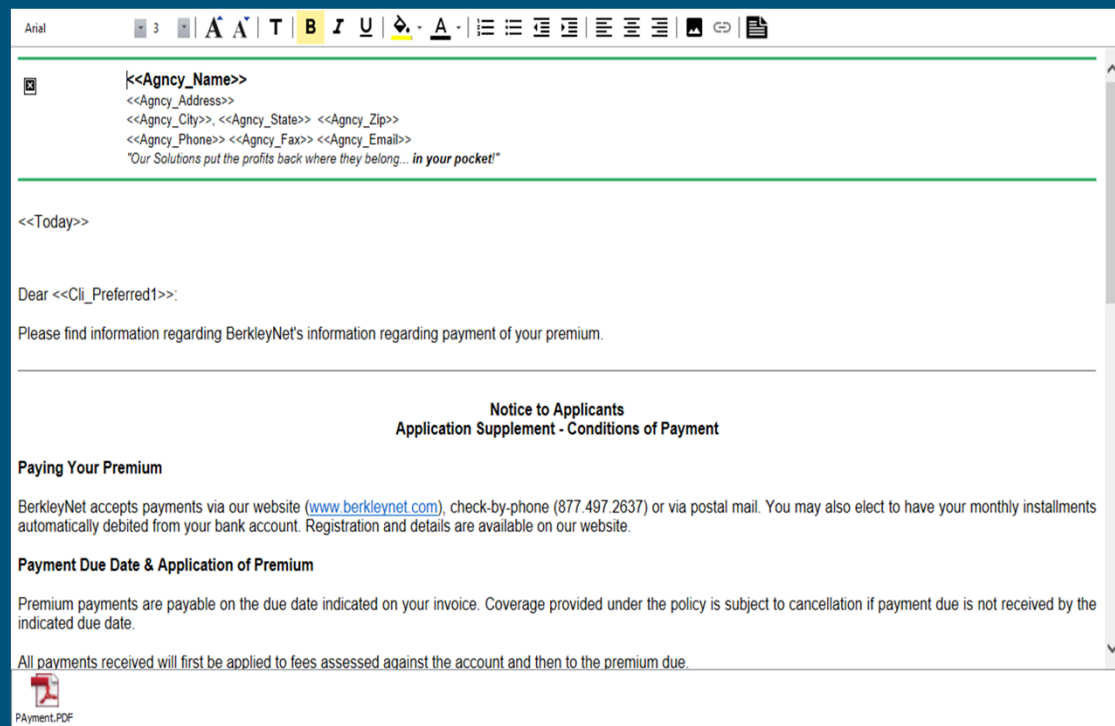
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Customizing YOUR templates

- Merge fields
 - Merge field list
 - Merge field not available? Make your own! Or get inventive (e.g. User_Notes as Title)
 - Inserting reports into letters - driver list, vehicle list, etc.

- Other tips

- Fake check boxes []
- Hyperlinks
- Automated attachments



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- Creating Categories for Correspondence Templates
 - See video on categories [here](#).
 - Batch emailing

Other Templates

Esignature Templates

Text Message Templates

Customized List Templates

How can I contribute to the Template Library?

