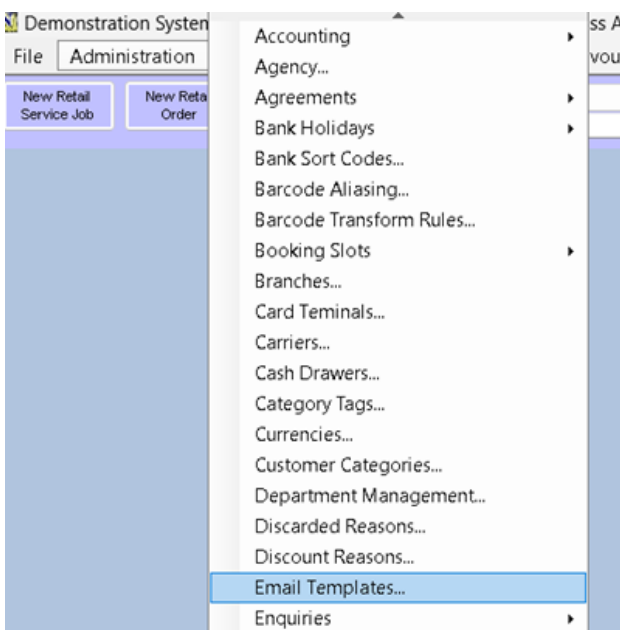


Letter Templates

Configuring Renewal Letters in NCompass Email System

Renewal letters are sent out via the NCompass Email system, the template can be configured in the admin menu.

Navigate to **Administration > Email Templates**.



Assistance

Our Implementations Team will assist you in setting up templates and linking them for you. There is an additional hourly charge for this service.

Adding a New Template

Email Template Administration

Templates

- Example Renewal Letter
- Field Call Changed – Carrier
- Field Call Changed – In House
- Field Call Complete – In House
- Field Call Consignment Sent – C
- Field Call Consignment Sent – C
- Field Call Creation – Carrier
- Field Call Creation – In House
- Item Return Note

☒ Standardise Case
☐ Show Expired

Template Settings

Description: Example Renewal Letter

Subject: Agreement %AGNO% is due for Renewal

Message Attachments

Dear %TITLE% %SURNAME%

Your agreement number%AGNO% is due for renewal on %RENEWALDATE%

This emails is an automitic reminder

Our admin team will contact you to discuss your renewal options

Supported tags:

Tag	Meaning
%CARRIERDESCRIPTION%	Field Call Carrier Description

☐ Expired

1. Click **'New'**.
2. Enter your email template text into the message box.
 - You can add tags from the list. The tags insert customer or agreement information when the email is sent. The list of tags now includes **%RENEWALDATE%** and **%AGNO%**

To attach PDF documents (same document for all customers, e.g., general terms and conditions or promotional documentation):

Click on the **'Attachments'** tab.

Template Settings

Description: Example Renewal Letter

Subject: Agreement %AGNO% is due for Renewal

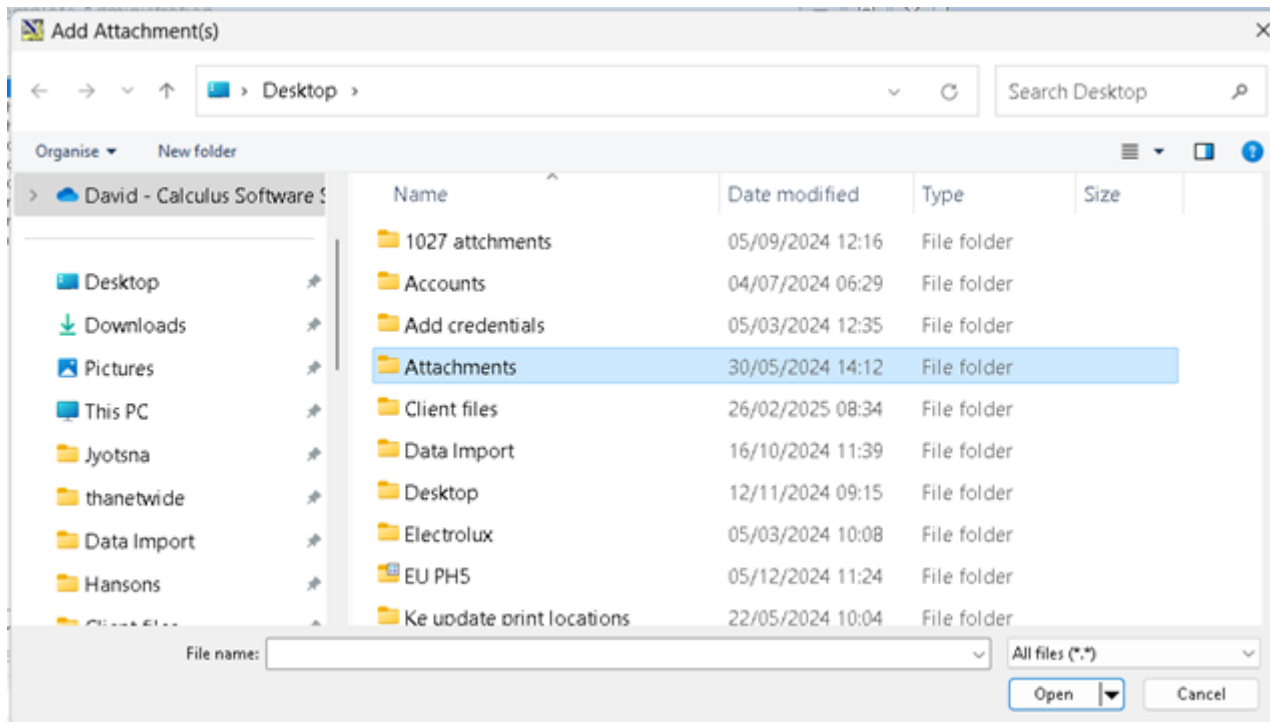
Message Attachments

Please ensure any attachments are in locations accessible to all workstations

C:\Users\David Pinder\Desktop\Desktop\LS2208 scanner
C:\Users\David Pinder\Desktop\Desktop\Crystal Reports
C:\Users\David Pinder\Desktop\Desktop\34_0100_0341_

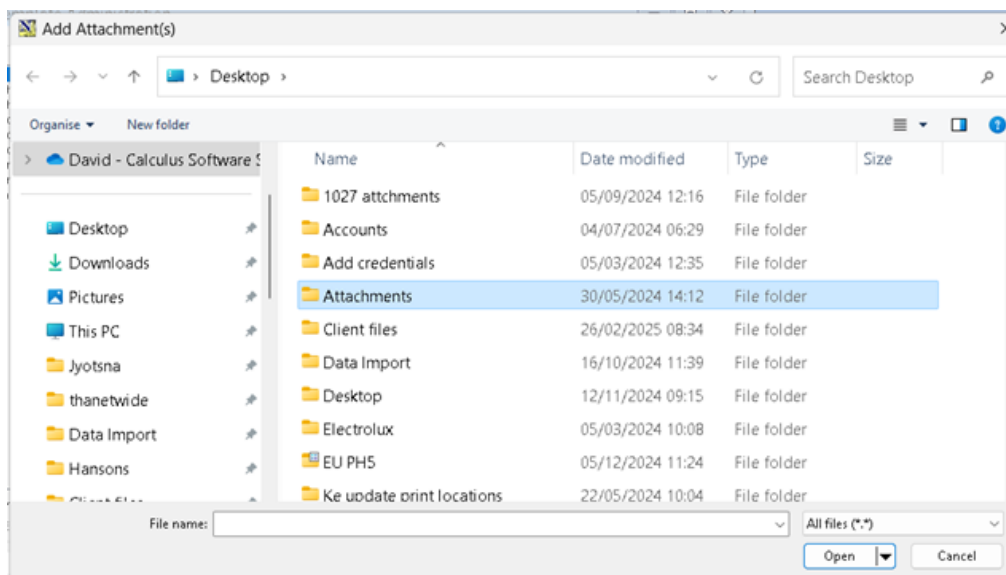
Click **'Add'** to open a file browser and add your PDF documents.

Browse to your file attachment. You can use the normal Windows browsing and selection, including highlighting multiple documents at once.



- Click the **'Open'** button to add them to your list of attachment
- You can add multiple documents by clicking the **'Add'** button again.

Once your message and attachments are complete, click **'Save'**.



Deleting an Attachment

1. Highlight your attachment.
2. Click **'Delete'** to remove the attachment from the list.

Editing a Template

1. Highlight your template from the list.
2. Click **'Edit'**.
3. Amend the template as needed.
4. Click **'Save'**.

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