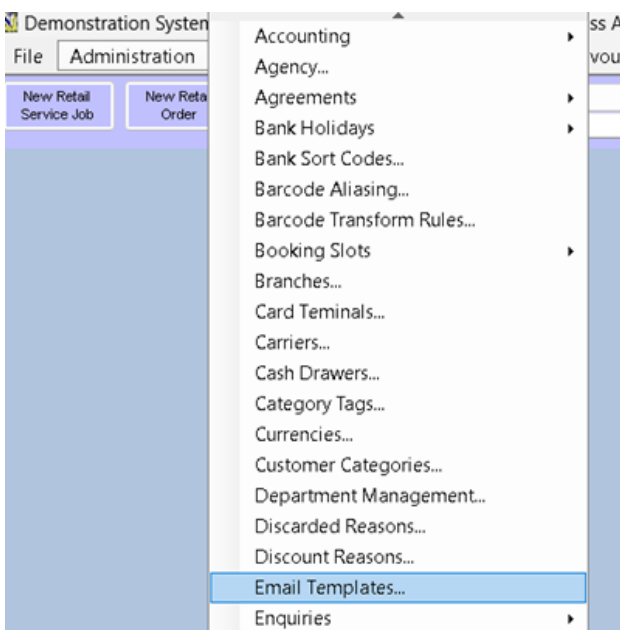


Letter Templates

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.

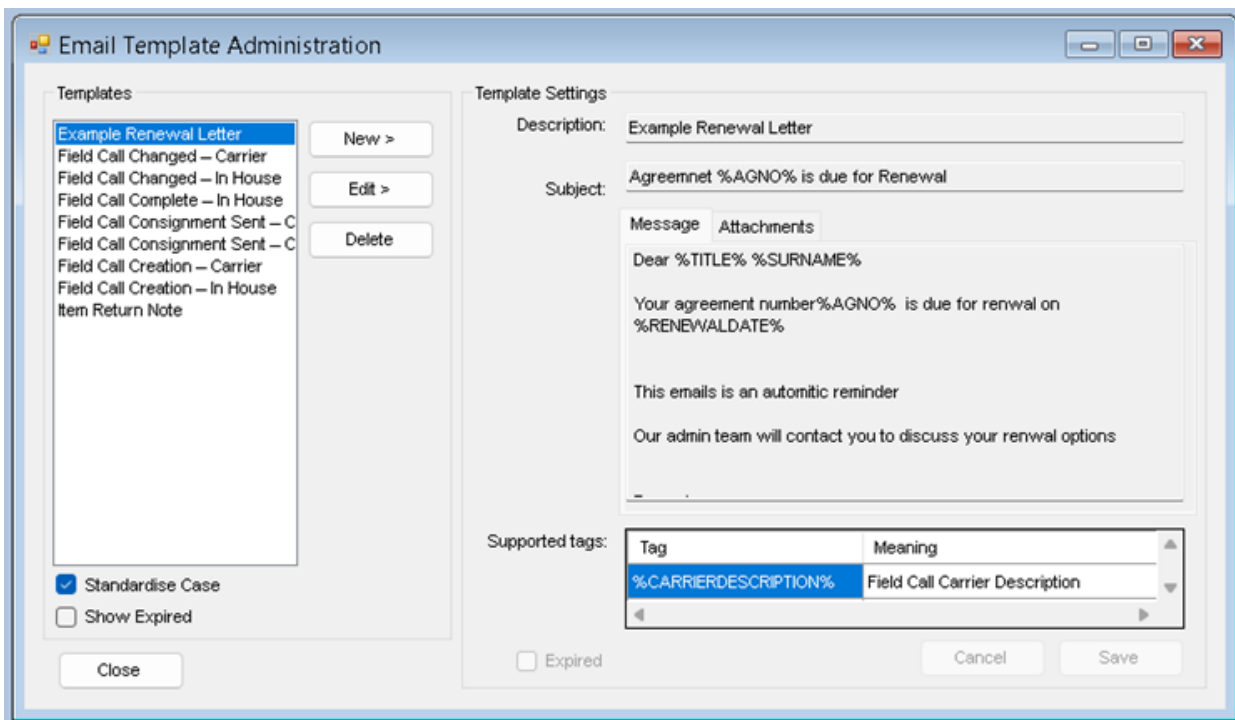
Navigate to **Administration > Email Templates**.



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.

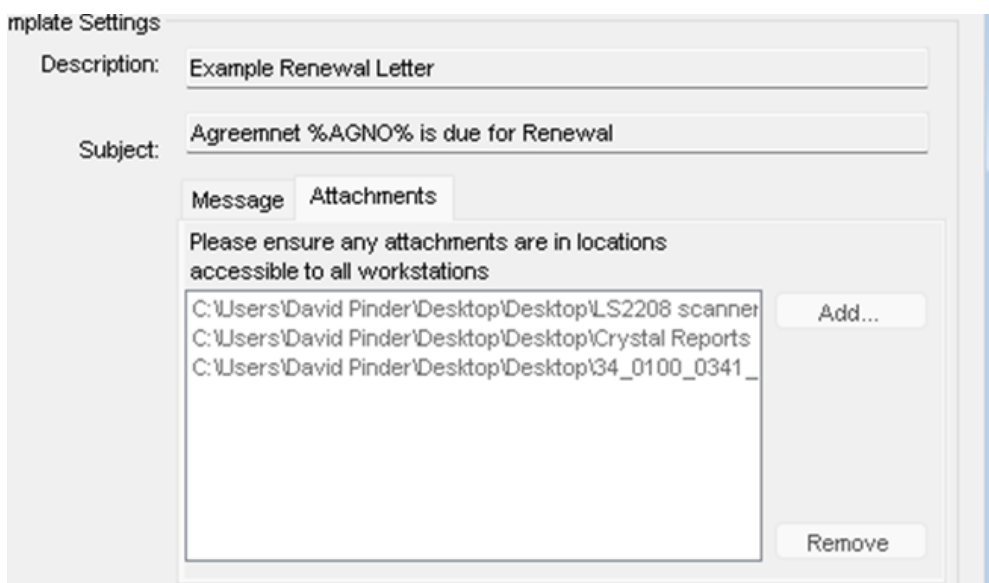
Adding a New Template



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%**

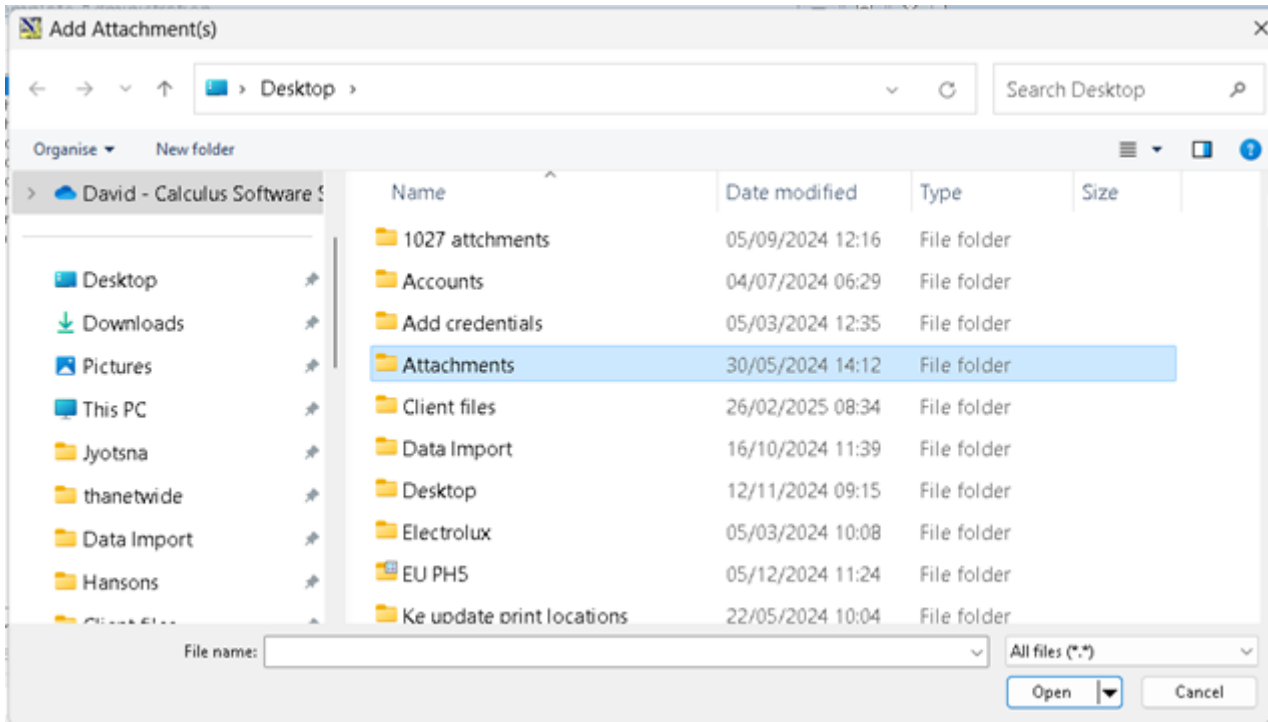
To attach PDF documents (same document for all customers, e.g., general terms and conditions or promotional documentation):

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



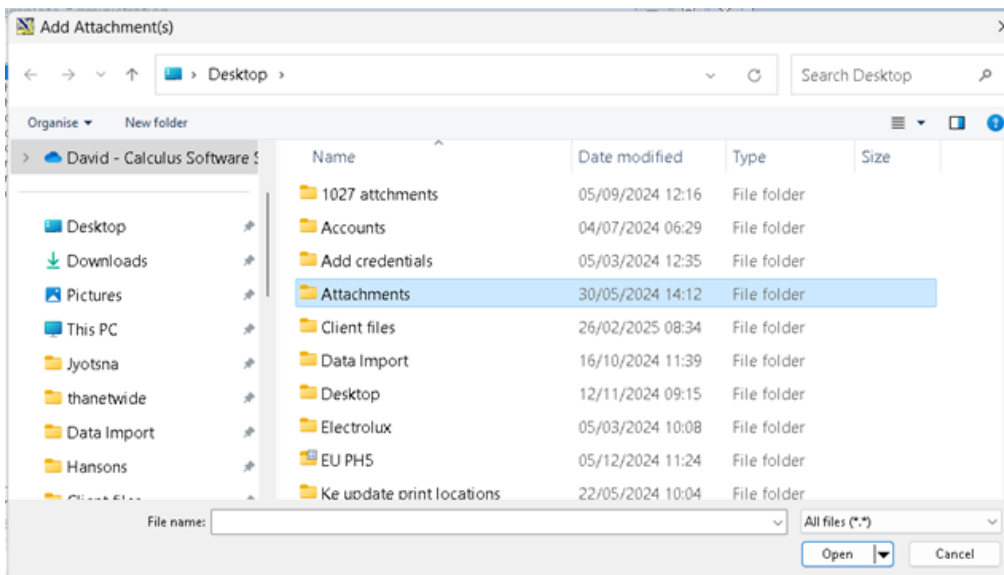
Click **'Add'** to open a file browser and add your PDF documents.

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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Updated 2025-03-10 15:58:51 UTC by Jasmine Richardson