Introduction to Legacy HawkSoft Help Documentation

Version 5 of the HawkSoft Management System has reached its end of support. The following documents are an offline copy of the legacy Version 5 online help portal, provided as a courtesy to your agency, which has elected to remain on HawkSoft version 5.

Please keep the following in mind as you navigate this help documentation:

- To prevent issues with size, portability, and navigability, the Version 5 help documentation has been split into nine PDF files (including this one). If a help topic contains a link to a different topic which does not seem to function properly, it most likely links to a topic contained in a different PDF file. In that case, try searching the other PDF files for the topic named in the link.
- While some topics may mention contacting Product Support for assistance, **please note that HawkSoft Product Support assistance of any kind is no longer available for this version of HawkSoft**.
- While we have done our best to remove any topics relating to online features that are no longer functional, this help documentation may still contain references to features which are no longer functional due to HawkSoft 5's end of support.
- Help and training videos are not available in this help documentation. However, you may still occasionally see references to help or training videos in this documentation.

Communications Overview

HawkSoft CMS provides a variety of ways in which users can correspond with customers, prospects, and other contacts entered into the CMS database.

Emails, letters, memos, proposals, and text messages can be created, and then printed and/or sent from the client files using the Action menu. Data from client files can be inserted into correspondence using merge fields.

These correspondences will be documented and attached to the client file. This is important for future reference, as well as Errors & Omissions concerns. See Correspondence Setup Overview for more information.

Some template setup is necessary to get the most from these correspondence features. See Correspondence Setup Overview for more information.

Text Messages

If your agency is looking to deliver real-time customer service to your clients, it's hard to beat the convenience of text messaging. HawkSoft offers two options for text messaging:

- **HawkSoft Text Messaging**: Enables real-time text message conversations with clients from CMS. The feature is included as part of your HawkSoft subscription and enabled through the Marketplace.
- **Email-to-SMS:** Sends text messages to clients via email in CMS. Replies from clients are sent back to an email address. This option requires a paid subscription from a supported Email-to-SMS provider.

  Text Messaging Overview

Form Letters

Form letter templates are created by the agency for specific purposes, for example, notices of pending cancellation. Merge fields are used to pull information from client and policy files.

Form Letters

Microsoft Word Form Letters

Merge Field Descriptions

Batch Mailing

Batch mailing using Report Generator enables your agency to send a mass mailing to all (or selected) clients from a report.

Batch Mailing (Print)

Mailing Labels

CMS provides address labels that make use of form letter templates and Avery® label styles 5160 and 8160. One default Avery label template is addressed to the named insureds. The other is addressed to the named insureds or "current resident".

Mailing Labels

Memos

Memos are one-time communications mailed to recipients that do not need a prepared form letter template. They are generally configured to pull basic name and address information from a client file. A user can then edit the message as needed.

Memos

Proposals

Proposals are created for marketing purposes and can consist of cover and post letters, line of business descriptions, and any attachments or photos that the user chooses to include. Multiple policies can be included within the same proposal package.

Proposals

Policy Overview Summaries

Policy summaries are documents that describe the policies in varying levels of detail. The Policy Overview is a simplified summary with carrier, term, and coverage information.

Client, Policy, and Claims Summaries

Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)

HawkSoft CMS enables you to make formatting changes and insert merge fields, signatures, and other elements into your letters, memos, proposals, and the Policy Overview.

Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)

Email

Whether using prepared templates or not, email can be sent directly from a client file in CMS. This action creates a log note in the client file that includes the content of the email. When items from the policy Attachments list are added to an email, a record of the attachment is included in the log note.

Email

Batch Emailing

This article describes how to use the CMS Batch Email feature to send a form email to a large list of customers or prospects.

Batch Emails

Modifying Email

HawkSoft CMS enables you to make formatting changes and insert merge fields, logos and other elements to your emails.

Modifying Email

Merge Field Descriptions

The HawkSoft CMS Letter Editor enables you to create form letters and other types of correspondence. You can add CMS merge fields that pull information from client and policy files into CMS templates and letters.

This article describes each CMS merge field used in the letter editor. Each merge field represents the information that appears in the finished letter.

Merge Field Descriptions

Text Messaging Overview

If your agency is looking to deliver real-time customer service to your clients, it's hard to beat the convenience of text messaging.

HawkSoft offers two options for sending text messages from within CMS:

HawkSoft Text Messaging	Email-to-SMS Services
• Available through HawkSoft Marketplace at an additional cost of $20 per month per agency	• Requires a paid subscription from a supported Email-to-SMS provider
• Requires Data Syncing	• Sends text messages to clients via email. Text messages appear to come from the agency's existing phone number
• Enables real-time text message conversations with clients from a central phone number, different from the agency's existing phone number • Upon request, and for a one-time fee of $99, HawkSoft can use the agency's existing phone number with HawkSoft Text Messaging. See Purchasing HawkSoft Text Messaging for more information.	• Sends text messages to clients via email. Text messages appear to come from the agency's existing phone number
• Each client's full text message history is viewable directly from within their client file	• Replies from clients are sent back to an email address
• Users can send a text from the Action	• Users can send a

HawkSoft Text Messaging	Email-to-SMS Services
menu, main toolbar, and various texting views	text from the Action menu
• Users are notified in CMS when a text is received	
Learn More: About HawkSoft Text Messaging	**Learn More:** Text Messaging with Email-to-SMS Services

About HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This topic provides links to additional articles to help you set up text messaging as well as everything you need to know to use the text messaging feature.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to a third-party *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.
>
> See Text Messaging Overview for more information.

Notes about HawkSoft Text Messaging

- **Opt in required**
  Federal law requires your customers to opt in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act. HawkSoft automates this opt in process with the click of a button. Learn more.
- **Texting is not for marketing purposes**
  HawkSoft Text Messaging is only for informational texts. You may be in violation of federal

and/or state regulations if you use texting for marketing purposes. You can read more about best practices for text messaging and maintaining TCPA compliance on our blog.

- **Your agency receives one text messaging phone number**
  Your agency is assigned one central text message phone number. Even if multiple staff members are texting a client, that client will see text messages arriving from a single phone number.

Purchasing HawkSoft Text Messaging

To take advantage of this feature, your agency must first enable . Once Data Sync has been enabled, a billing contact for your agency can purchase Text Messaging through the Marketplace.

See Purchasing HawkSoft Text Messaging for detailed steps on how to purchase the text messaging feature.

Text Messaging Opt in Workflow & Compliance

FCC requires all clients opt in to receive text messages from your agency. HawkSoft simplifies this requirement with an automated opt-in workflow.

Text Messaging Opt-In Compliance

Viewing & Sending Text Messages

HawkSoft makes it easy to view client text messages and send replies from a variety of locations within CMS. Available views and options depend on your texting permissions.

Viewing & Sending Text Messages

Processing Text Messages

Once you have taken action as a result of the text conversation, you can copy the relevant texts into a log note to document history and mark the texts as "processed." This guide details our recommended workflow for processing text messages.

Processing Text Messages

Unmatched Texts

When a text message is received from a number that does not match a client file, those texts are collected in the "Unmatched Texts" view. Learn how to match text messages with a client file in this guide.

Unmatched Texts

Text Message Notification Settings

HawkSoft CMS keeps your team updated on incoming text messages through real-time notifications and text counts.

You can receive text notifications and number of incoming texts for:

- Clients for which you are listed as a policy CSR or producer.
- Clients you choose to follow.
- Any unmatched text messages.

Text Message Notifications

Cancelling HawkSoft Text Messaging

If your agency no longer wishes to use HawkSoft Text Messaging, agency administrators can download your agency's texting history and attachments and cancel your subscription through the HawkSoft Marketplace.

Cancelling HawkSoft Text Messaging

Purchasing HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This guide walks you through the steps to purchase and set up Text Messaging for your agency. Since HawkSoft Text Messaging is a Data Sync feature, you must first enable HawkSoft Data Sync from the Marketplace.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file.
>
> See Text Messaging Overview for more information.

In this topic:

Notes on HawkSoft Text Messaging

- **Opt in required**
  Federal law requires your customers to opt-in to receive text messages from your agency. This is mandated by the FCC’s Telephone Consumer Protection Act. HawkSoft automates this opt-in process with the click of a button. Learn more.
- **Texting is not for marketing purposes**
  HawkSoft Text Messaging is only for informational texts. You may be in violation of federal and/or state regulations if you use texting for marketing purposes.
- **Your agency receives one text messaging phone number**
  Your agency is assigned one central text message phone number. Even if multiple staff members are texting a client, that client will see text messages arriving from a single phone number.

Before you begin

Before purchasing HawkSoft Text Messaging, you must first register for the HawkSoft Marketplace and enable HawkSoft Data Sync so the application can access your HawkSoft data.

Your email address must be listed on the HawkSoft License Agreement as a main contact.

Register for the HawkSoft Marketplace

The HawkSoft Marketplace offers agency managers the option to enable HawkSoft Data Syncing, purchase and configure HawkSoft products, and integrate with third-party applications.

1. Click the **Settings** icon on the the HawkSoft CMS toolbar, and then select **Marketplace**.
2. Click **Register Now**.
3. Enter your **Email Address**, and then click **Submit**.

   Your email address must be listed on the HawkSoft License Agreement as a main contact. If you receive an error indicating your email address is not listed as a main contact, or your current email address is different than the one used for the HawkSoft License Agreement, please have your agency owner contact billing@hawksoft.com to update your information, and then try again.

   An **Authentication Code** is sent to your email address.
4. Copy the code from the email and paste it into the corresponding field on the Marketplace registration window.
5. Check the box below the Authentication Code field stating you agree to the **Terms and Conditions for HawkSoft Marketplace**.
6. Click **Submit**.

   A confirmation message appears.
7. Close the HawkSoft Marketplace Registration screen.

   You are ready to enable additional HawkSoft products and third-party applications.

Enable HawkSoft Data Sync

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > General Configuration Settings
>
> See Setting User Permissions for more information.

1. Click the ⚙ **Settings** icon, and then select **Marketplace**.

   If you haven't registered for the Marketplace, see HawkSoft Marketplace for detailed instructions.

2. Click and read the **HawkSoft Terms and Conditions** in the *HawkSoft Data Sync* section, and then check the box to accept the Terms and Conditions.
3. Click **Activate**.

   The **HawkSoft Cloud Confirmation** window opens.

4. Click **Confirm**.

   A confirmation message appears.

5. Click the **Return to Marketplace** button.

Purchase HawkSoft Text Messaging

Once Data Sync is enabled, you can register for Text Messaging through the Marketplace.

1. Click the ⚙ **Settings** icon, and then select **Marketplace**.
2. Under HawkSoft Text-Messaging, click **Activate**.

   Important HawkSoft Text Messaging Information displays.

3. Review the opt-in requirements, rules regarding use for marketing purposes, information about your phone number, read the terms and conditions, and then click **Next**.
4. Determine if your agency will require users to opt-in before sending messages, allow users to skip the opt-in process, or if HawkSoft's opt-in process will be disabled for your agency.

   > ⚠ Federal regulations require that agencies receive opt-ins from clients before sending text messages. If you choose to disable opt-ins, or allow agents to skip opt-ins, you agree to receive opt-ins from clients through other means. HawkSoft is not responsible for any fines or penalties imposed by telecom carriers for non-compliance.

   See Text Messaging Opt-In Compliance to learn more.

5. Enter a phone number for clients with questions to call in the **"Help" Response** section.

   When a client sends the phrase 'HELP' to your texting number, an automated message will direct the customer to call this number.

6. Enter an **Area Code** *or* **Zip Code** to generate a localized phone number to be used by your agency for text messaging, and then click **Finish**.

> In some metropolitan areas, your desired area code may be unavailable. If you receive this error message, use a zip code to generate your phone number.

7. Check "**I understand my agency will be charged $20.00 per month starting on my next HawkSoft invoice.**"

8. Read the **Additional Required Information**.

   This section explains that additional information will be required on the next page in order to register your agency with The Campaign Registry (TCR). Telecom carriers require that all businesses sending text messages register their business with TCR.

9. Click **Finish** to complete your order.

   A **Congratulations** page appears, which shows the status of your HawkSoft texting number and lists the next steps towards enabling HawkSoft Text Messaging.

Complete required information to start registration process

Additional information is required to register your agency with The Campaign Registry (TCR) before HawkSoft Text Messaging can be enabled. Telecom carriers require that all businesses sending text messages register their business, or "brand", with TCR.

If this information is not filled out by the agency, a HawkSoft representative will contact your agency to gather this information.

> If you are interested in using your agency's main phone number as your HawkSoft Texting number, you can request to enroll in Main Number Texting through the Required Information Form. See Purchasing HawkSoft Text Messaging for more information.

1. Open The Campaign Registry Required Information Form in your web browser.
2. Fill out the information requested in the form.
3. Click **Submit Information** to send this information to HawkSoft.

   HawkSoft will use this information to register the agency in The Campaign Registry.

4. Close the Marketplace window and return to HawkSoft CMS.

HawkSoft submits this information to The Campaign Registry. After registration is complete within TCR, HawkSoft will activate Text Messaging for your agency.

HawkSoft will send an email to your agency's main contacts once Text Messaging is activated.

If your agency previously used a different text messaging integration (such as Bulk SMS or Message Media), HawkSoft Text Messaging will be automatically set as the default texting tool within all User Settings after activation. If the additional text messaging service is no longer needed, you may cancel the service.

> Once your agency receives notification that HawkSoft Text Messaging is activated, all users must restart CMS in order to begin using HawkSoft text messaging.

Your texting number

Once you complete your HawkSoft Text Messaging order, HawkSoft begins creating and registering a new texting number from your agency, using the area code provided on the previous page.

It can take up to five minutes for HawkSoft to register your new phone number. You can click the refresh button after waiting, or view your number at a later time by re-opening the Marketplace and clicking **Manage** under HawkSoft Text Messaging.

Main Number Texting

Upon request, HawkSoft can set up your agency's main phone number as your HawkSoft Text Messaging number. There is a $99 one-time fee for enabling Main Number Texting.

> Not all phone numbers are able to be used for Main Number Texting. Your agency will not be charged the one time fee until your requested phone number has been successfully enrolled in Main Number Texting.

> HawkSoft Text Messaging setup must be completed before the process for enrolling in Main Number Texting can begin. Your agency will use the separate texting number ordered through the Marketplace until the enrollment is complete.

1. Complete and submit The Campaign Registry Required Information Form in your web browser.

> If your agency already submitted the form but selected not to enroll in Main Number Texting, and you would now like to switch to your agency's main number, contact Product Support for assistance.

a. Within the Required Information Form, select **Yes** next to "**Do you wish to enroll in Main Number Texting?**"

b. Complete the additional fields that appear with your main number, your phone service provider, the business name you use with your phone service provider, and the service address you use with your phone service provider.

Once HawkSoft is notified of intent to enroll, the agency principal will receive an email from HawkSoft staff containing a Letter of Authorization and signing instructions. If your agency did not complete the additional Main Number Texting fields within the TCR Required Information Form, you will be asked to provide additional information.

2. Complete the **Letter of Authorization**.

3. Reply to the email from HawkSoft with the completed Letter of Authorization attached. Provide any additional information needed within your reply, if requested to do so by HawkSoft.

Upon receipt, HawkSoft informs all agency main contacts that HawkSoft will now attempt to get the requested phone number for Main Number Texting, and will notify the agency when the process is complete.

You will receive an email from HawkSoft confirming that your agency is now signed up for Main Number Texting, using the number you requested.

> Once Main Number Texting is enabled, all old messages and opt-ins will remain, however your previous HawkSoft Text Messaging number will no longer be active, and any texts sent to the old texting number will not be received going forward. Make sure to inform your clients of the changed texting number.

If HawkSoft is unable to get the requested number, HawkSoft will inform the agency's main contacts, and you may request to try a different number.

Text messaging administration

Once HawkSoft Text Messaging is enabled, all users can begin sending outgoing text messages to client files they have access to. Administrators can disable text messaging for certain users within User Permissions.

Available Texting Permissions:

- **Client File > Allow Sending Text Messages**: Grants permission for CMS users to send outgoing texts to clients.
- **Setup > Texting Administration**: Allows users to view all text messages, regardless of client file permissions, via the All Unprocessed Text Menu.

Permissions are not required to *view*text messages, so long as the user has permissions to access the client's file.

See About HawkSoft Text Messaging for more information on HawkSoft Text Messaging workflows.

Related Topics

Processing Text Messages
Text Message Notifications
Text Messaging Opt-In Compliance
Viewing & Sending Text Messages

Text Messaging Opt-In Compliance

Federal law requires your clients to opt in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act.

As part of setting up HawkSoft Text Messaging for your agency, you are given the option to automatically require clients to opt in before receiving text messages from your agency.

In this topic:

	Configuring Opt-In Settings	Sending an Opt-In Request
Verify Client Opt-In Status	Manually Opt-Out a Phone Number	Resend Opt-In Texts

This guide walks you through the steps to change the opt-in requirement setting after setup is complete.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.
>
> See Text Messaging Overview for more information.

Configuring opt-in settings

During setup, HawkSoft provides three options to address opt-in requirements:

Use HawkSoft's automated opt-in process – This option requires that all users send an automated opt-in message to clients. Clients must reply "yes" to this message before outgoing texts can be sent. This is the recommended option as it helps your agency maintain compliance with federal regulations.

Allow users to accept legal liability for my agency and skip the opt-in process – This option allows HawkSoft users to skip the opt-in process for individual phone numbers. This is helpful if your agency collects opt-ins through another method and certain clients have already given their permission to receive text messages.

Accept legal liability on behalf of my agency and disable the automatic opt-in process - This option removes the opt-in process for all client files.

You can change your selection at any time by returning to **Marketplace**.

1. Click the **Settings** icon, and then select **Marketplace**.
2. Scroll down to the Text Messaging section.
3. Click **Manage**, and then click **Next** to change your Opt-in selection.
4. Click **Save**.

Each user must restart CMS for the new opt-in workflow to take effect.

Regardless of which method you select, if a client opts out of text messages by sending "Stop," you are required to complete the HawkSoft opt-in process and receive a "yes" in reply to resume text communication.

To send an opt-in request

If Automatic Opt-In is enabled, HawkSoft CMS will not allow you to send an outgoing text message until the client has opted in for text messages.

The opt-in request is sent as a text message. Once a client replies with "Yes," they will be opted in and ready to receive future texts.

Send an opt-in request from the Action menu

HawkSoft recommends using the Action menu to send the initial opt-in request, to create a log note.

1. Retrieve the client file, and then select the Client tab.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Send Text Message**.
   The **Text Message Recipients** dialog opens to display all cell phone numbers associated with the client file, as well as their opt-in status.
4. Select one or more phone numbers by checking the box next to the number, and then click **Send Opt In**. The opt-in status for each phone number will change to Pending.

   > If your agency does not require automatic opt-in, you will see the option to skip sending this message.

5. Click **Finish** on the Text Message Recipients dialog.
6. Click **Finish** on the Action menu.

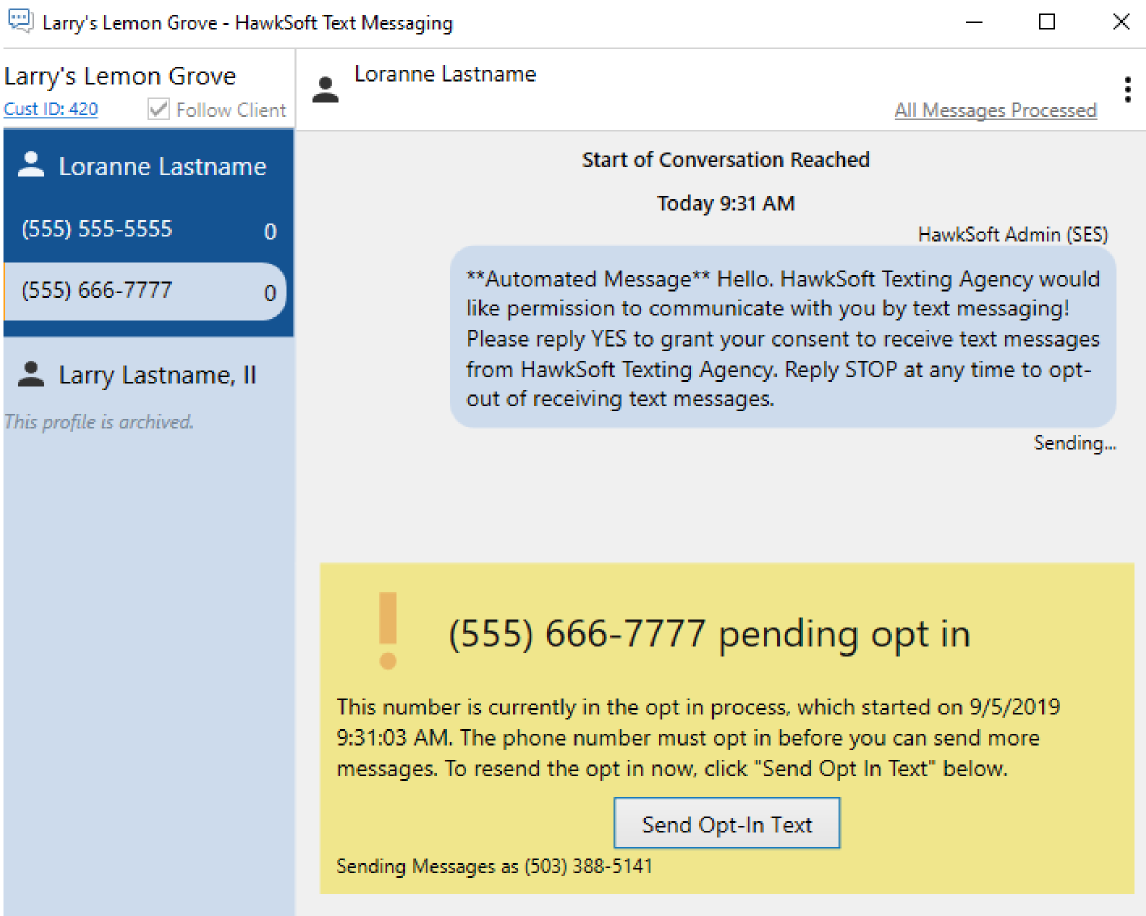
HawkSoft creates a log note to document the opt-in request.

Send an opt-in request from a texting view

1. Select a phone number from the side-bar of the Client Texts, My Texts, or Unmatched Texts view.
2. Click **Send Opt-In Text**.

   > If your agency does not require automatic opt in, you will see the option to skip sending this message.

Once the opt-in request is sent, it remains Pending until the client accepts.



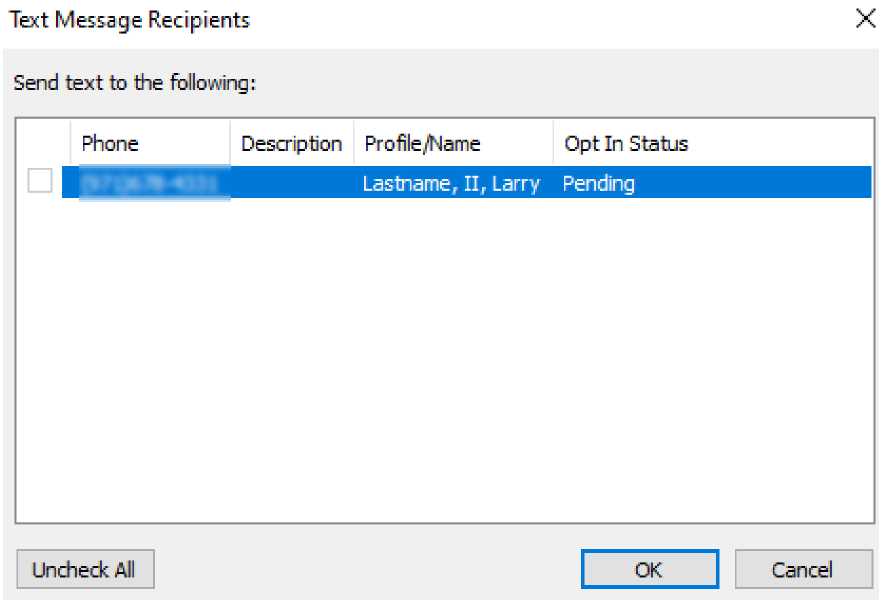
Once the client replies "Yes" to the automatic opt in message, you can begin sending text messages.

Clients can opt out of text messaging anytime by texting "Stop."

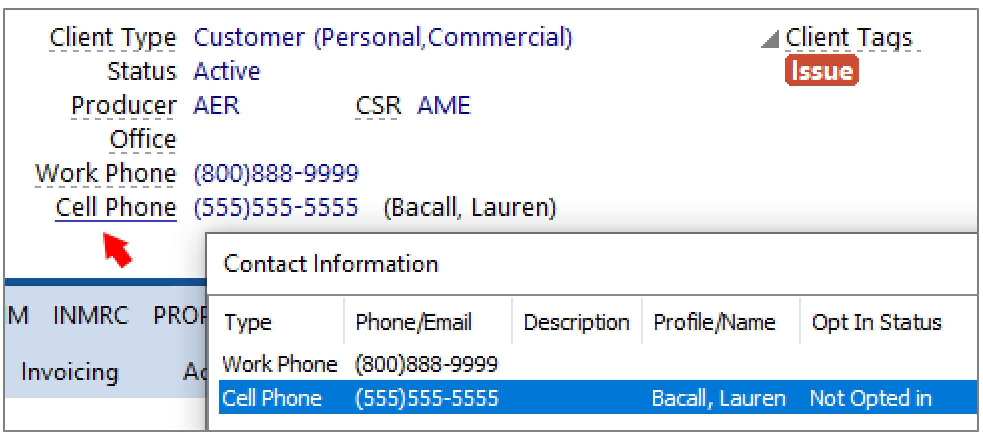
To verify client Opt-In Status

You can verify the client's opt-in status from a few places in CMS:

- Click the ⋮ icon on the **Text Messaging** dialog, to view the client's **Opt-In Status** at any time.
- View the status from the **Text Message Recipients** dialog when using the **Action** menu to initiate a text.



- Click on the Cell Phone link on the client file to open the Contact Information dialog.



To manually Opt Out a phone number

Clients can automatically opt out of text messaging anytime by texting "Stop." In addition, if a client expresses verbally or otherwise that they do not wish to receive text messages from your agency, you can manually opt out their phone number.

1. Retrieve the client file, and then select the Client tab.
2. Click **Action**, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Change Client**.

---

4. Select a phone number within the Contact Info box, and then click **Edit**.
5. Click **Opt Out Phone Number**.

   A confirmation message appears.

If you wish to send a text message to the client in the future, you will have to initiate the opt in process.

To resend Opt-In Texts

Occasionally you might need to resend the opt-in message to a client. Some agencies might want to renew opt-in statuses yearly, or a client might acquire a different phone number.

1. Retrieve the client file, and then select the Client tab.
2. Click on **Client Texts**.
3. Click on the ⋮ icon in the right-hand corner of the Texting window, then select **Opt-In Status**.

   A message appears confirming the number has already been opted in.

4. Click **Send Opt-In Text**.

   HawkSoft will not allow any outgoing text messages to the client's number until they have replied "Yes" to the opt in text message.

Related Topics

About HawkSoft Text Messaging
Text Message Notifications
Purchasing HawkSoft Text Messaging
Viewing & Sending Text Messages

Viewing & Sending Text Messages

HawkSoft makes it easy to view client text messages and send replies from a variety of locations within CMS. Available views and options depend on your texting permissions.

This topic is applicable to the built in HawkSoft Text Messaging feature. See About HawkSoft Text Messaging to learn how to register and configure this feature.

As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an*email-to-text messaging*service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.

See Text Messaging Overview for more information.

In this topic:

View a Text Message	Text Message Information	Send a Text Message
Watching a Conversation	Archived Phone Numbers and Profiles	

To view a text message

There are several options within HawkSoft CMS where you can view and reply to texts.

Required Permissions:
To perform this task, no specific CMS user permissions are required.

Text Message View	Accessibility & Contents
Client Texts  	Accessible from the toolbar while viewing the client's file. Clicking on a popup text notification will also bring you to the Client Texts view if you are on that client file. This view shows the texts only for a particular client. You can also initiate the opt-in process from this screen. If you have permissions to access the client's file, you can *view* the entire text history from this window, even if you do not have permissions to send text messages.
My Texts 	Accessible from the HawkSoft CMS menu bar and the "My Text" link on the left side-bar of CMS. Displays all conversations that have unprocessed text messages on any client file which has you listed as a CSR or Producer, or for clients you

	choose to follow.
Unmatched Texts	Accessible from the "Unmatched Texts" link on the left side-bar of CMS. Displays all text messages received from phone numbers not found within HawkSoft CMS. SeeUnmatched Texts for more information.
All Unprocessed Texts	Viewable by Texting Administrators only. Displays all conversations for your agency that are not yet marked as processed. See Processing Text Messages for more information.

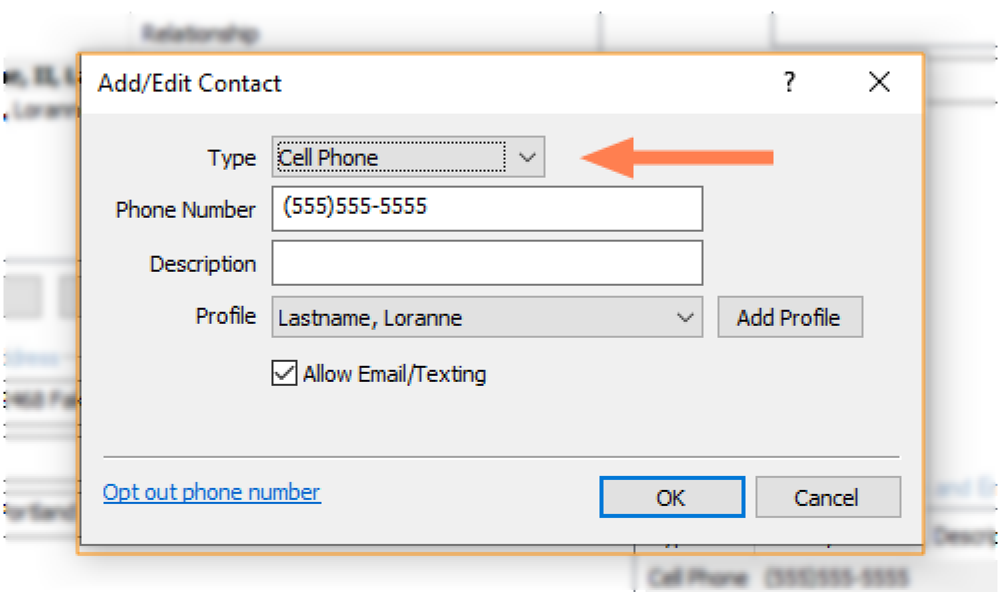
Text message information

Hover your mouse near a text message and click the down arrow icon to view more information about a text message, including the client file(s) the phone number is matched to, date and time the message was received, and whether or not the message has been processed.

If the text message contains an image, additional options for processing the image appear.

Helpful Tip

Be sure to select Cell Phone when entering a cell phone number on the Contact Information for your clients. Other phone types will not appear as options for text messaging.



To send a text message

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Client File > Allow Sending Text Messages
>
> See Setting User Permissions for more information.

We recommend the following workflow for texting to simplify processing and minimize E&O exposure:

> To learn how to text an ID Card to the Insured, see Auto ID Card or State Specific ID Cards.

1. Retrieve the client file, and then select the policy if needed.

   You will be able to insert data from the selected client or policy when composing the text message.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Send Text Message**.
4. Select the recipient(s) from the **Text Message Recipients** dialog, and then click **OK**.

   If the client has not yet opted in to receive text messages, you will need to send an opt-in request before contacting the client via text message.

   ## To send the initial opt-in message

   a. Retrieve the client file, and then select the Client tab.

   b. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.

   c. Select **Send Text Message**.
   The **Text Message Recipients** dialog opens to display all cell phone numbers associated with the client file, as well as their opt-in status.

   d. Select one or more phone numbers by checking the box next to the number, and then click **Send Opt In**. The opt-in status for each phone number will change to Pending.

If your agency does not require automatic opt-in, you will see the option to skip sending this message.

e. Click **Finish** on the Text Message Recipients dialog.

f. Click **Finish** on the Action menu.

HawkSoft creates a log note to document the opt-in request.

It is also possible to send an opt-in request from a texting view. See Text Messaging Opt-In Compliance for more information.

5. Select a template to begin the conversation or select **No Template** and click **OK**.

When using a template that contains policy level merge fields such as the Company Name or Policy Number, be sure to select a policy. See Text Message Templates for information on setting up a template.

6. Compose your message and click **Send**.

Optional: Click **Insert Field** to include information from the selected client or policy.

We suggest keeping text messages under 160 characters to prevent the message from being divided into multiple texts, which can cause confusion.

7. Click **Finish** on the Action menu.

The Add Log Entry Comments dialog opens.

8. Add comments as needed, and then click **OK**.

Your text message is documented in the log note.

Moving forward, you can copy and paste the entire conversation in an appended log note.

Append the Log Note with additional messages

Once you have finished exchanging text messages with the client for one conversation, you can copy and paste the remaining text messages into an appended log note.

1. Hover your mouse to the left of the first text in the conversation, and then select the box that appears.

2. Select the box next to the last text in the conversation.
3. Click **Copy Text to Clipboard** at the top of the Texting window.

   A message appears confirming that all texts between your two selections will be copied.
4. Click **OK**.

> For E&O purposes, HawkSoft will not allow you to skip messages between the beginning and end of your selection.
>
> - To copy a conversation, select the first and last message, and then click **Copy Text to Clipboard**.
> - To copy only one text, rather than a conversation, simply select one check box.

5. Return to the client file and right-click on the original log note, and then select **Append Log**.
6. Press **Ctrl-V** on your keyboard to paste the text conversation into the log note or right-click and select Paste.

See Processing Text Messages and Appending a Log Note for more information.

Watching a conversation

When you are actively texting with a client, you will likely keep the client texting window open. When this occurs, HawkSoft considers you to be "watching" the conversation and will mute notifications for other users following the client. This prevents fellow users from receiving a rapid secession of notifications as the client replies to you, and prevents other users from replying to the client at the same time.

However, if another user opens the Client Texting view for that client, they will receive notifications.

Be sure to close the Client Texting view when you are ready for other users to receive notifications of the client's replies.

Archived phone numbers and profiles

If you remove a phone number or archive a profile from the client file, the text messaging history for the number will continue to display within the Client Texts view with a note that "This profile is archived." Users will not be able to send text messages to the phone number from that client file.

New messages from the number will not display - they will be sent to the Unmatched Texts view or to any other client file the number is associated with.

Related Topics

- Auto ID Card
- Processing Text Messages
- State Specific ID Cards
- About HawkSoft Text Messaging
- Text Message Notifications
- Text Messaging Opt-In Compliance
- Purchasing HawkSoft Text Messaging
- Unmatched Texts

Processing Text Messages

A text message is considered processed once appropriate action is taken on the client/policy and the conversation has been added to a log note.

This guide covers the recommended workflow for processing text messages using the built-in HawkSoft Text Messaging tool.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.
>
> See Text Messaging Overview for more information.

You can process text messages from any texting view: Client Texts, My Texts, Unmatched Texts, All Unprocessed Texts. See Viewing & Sending Text Messages for more information.

We do not recommend processing unmatched text messages until they have been associated with a client file. See Unmatched Texts for more information.

HawkSoft keeps a record of each client's full texting history, including processed and unprocessed text messages, within the Client Text window.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Client File > Access to Client Types (You must have permission to the Client Type you want to access.) > Action Menu

See Setting User Permissions for more information.

Suggested workflow for processing text messages

HawkSoft keeps a record of each client's full texting history within the Client Text window.

HawkSoft recommends that you copy and paste text messages into a log note and/or attach a PDF of the conversation to a log note for the following reasons:

- Record an action or policy change that resulted from the text message
- Provide context for the conversation and maintain E&O accountability
- Enable log notes containing text messages to be exported, should an agency leave HawkSoft CMS (the full text log found within the Client Texts window is not available for export.)

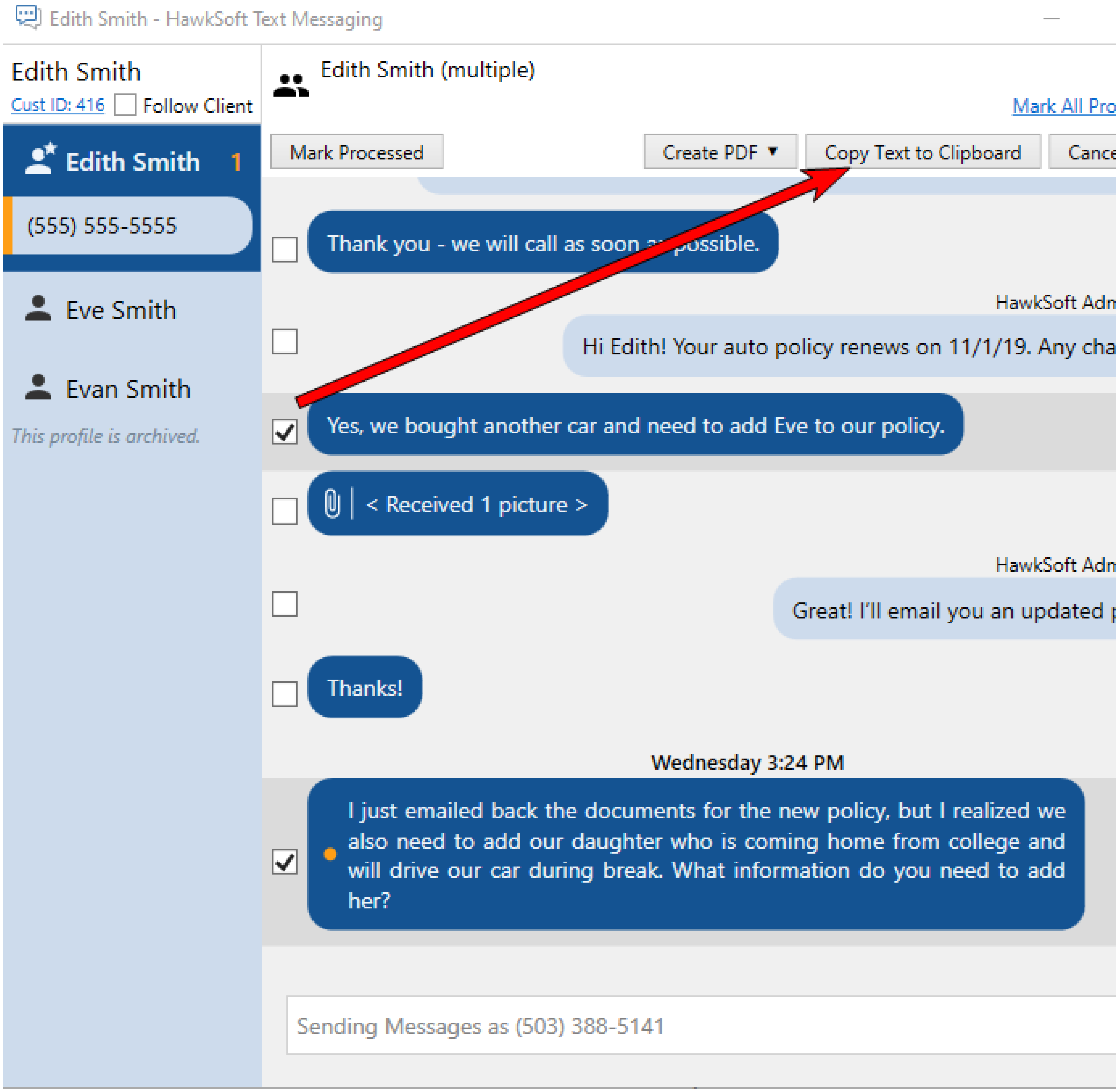
After saving the log note, you can mark the corresponding texts as processed using the steps below.

Copying text messages to your clipboard

1. Open a text messaging view, click to the left of the first text in the conversation, and then select the check box that appears.

2. Select the check box next to the last text in the conversation.

3. Click **Copy Text to Clipboard**.



For E&O purposes, HawkSoft will not allow you to skip messages between the beginning and end of your selection.

- To copy a conversation, select the first and last message, and then click **Copy Text to Clipboard**.
- To copy only one text, rather than a conversation, simply select one check box.

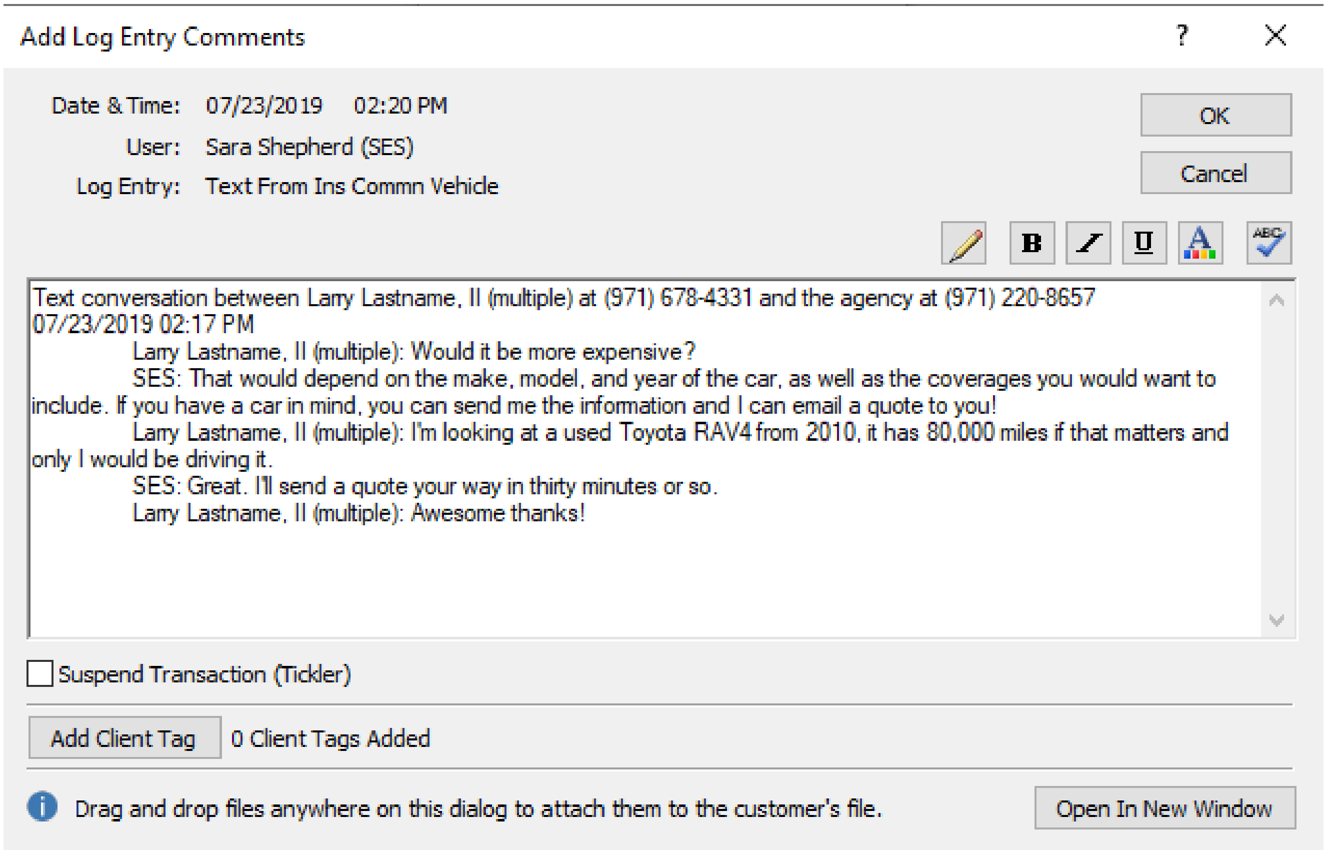
4. Click **OK**.

Adding Text Messages to a log note

Once you have copied the text messages to your clipboard, return to the client file.

1. Click **Action**, and then select one item in each of the first three lists to describe what prompted this transaction.
2. Select an action to perform or select **Log** from the fourth list on the Action menu.

   The **Add Log Entry Comments** dialog opens with the date and time, username, and the Action menu thread that created the log.
3. Right-click in the **Add Log Entry Comments** dialog, and then select **Paste**.
4. The selected text messages appear in the log note, as well as which agent was texting, text numbers used, and the time and date of the text messages.



5. Add comments as needed, and then click **OK** to save the log note.

Append the log note with additional messages

Once you have finished exchanging text messages with the client for one conversation, you can copy and paste the remaining text messages into an appended log note.

1. Hover your mouse to the left of the first text in the conversation, and then select the box that appears.
2. Select the box next to the last text in the conversation.
3. Click **Copy Text to Clipboard** at the top of the Texting window.

   A message appears confirming that all texts between your two selections will be copied.
4. Click **OK**.

For E&O purposes, HawkSoft will not allow you to skip messages between the beginning and end of your selection.

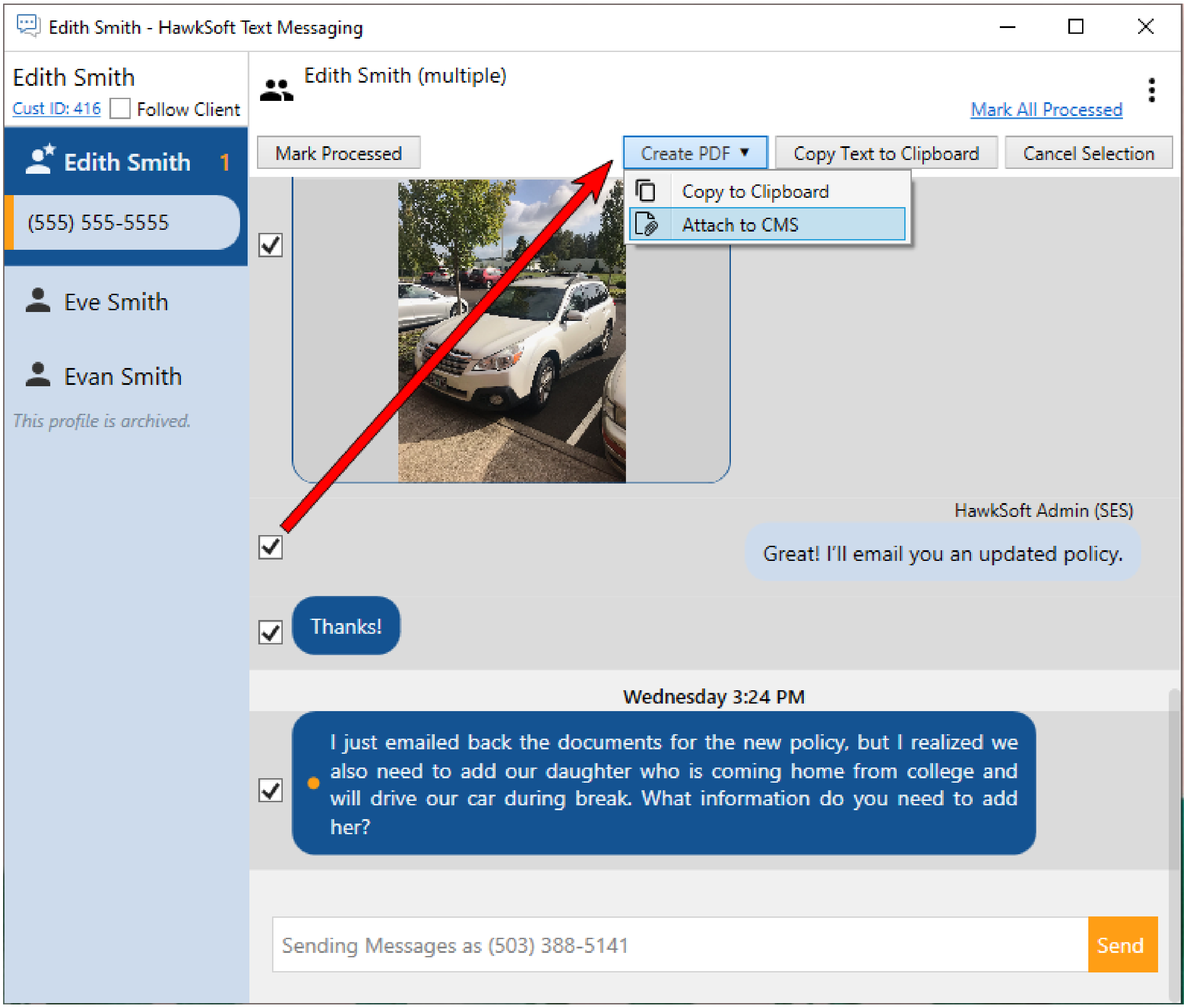
- To copy a conversation, select the first and last message, and then click **Copy Text to Clipboard**.
- To copy only one text, rather than a conversation, simply select one check box.

5. Return to the client file and right-click on the original log note, and then select **Append Log**.
6. Press **Ctrl-V** on your keyboard to paste the text conversation into the log note or right-click and select Paste.

Saving text messages to PDF

HawkSoft can generate a PDF file from selected text messages to create a record of the conversation. This PDF file can be copied to your clipboard or attached to a log note using the HawkSoft Virtual printer.

The PDF method can be done in addition to or instead of copying and pasting the text into a log note.



1. Open a texting view, click to the left of the first text in the conversation, and then select the check box that appears.
2. Select the check box next to the last text in the conversation.

For E&O purposes, HawkSoft will not allow you to skip messages between the beginning and end of your selection.

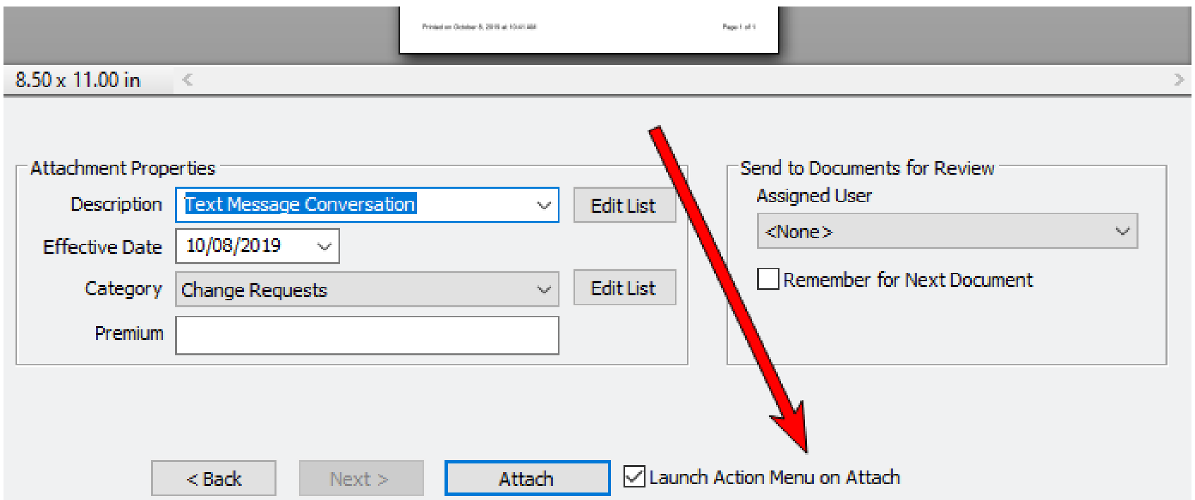
- To copy a conversation, select the first and last message, and then click **Create PDF**.
- To create a PDF of only one text, rather than a conversation, simply select one check box.

3. Click **Create PDF** and select one of the two options from the drop-down menu:

    Copy to Clipboard - Creates a temporary PDF file which is saved on your computer's clipboard. You can paste this file to your computer or into another program.

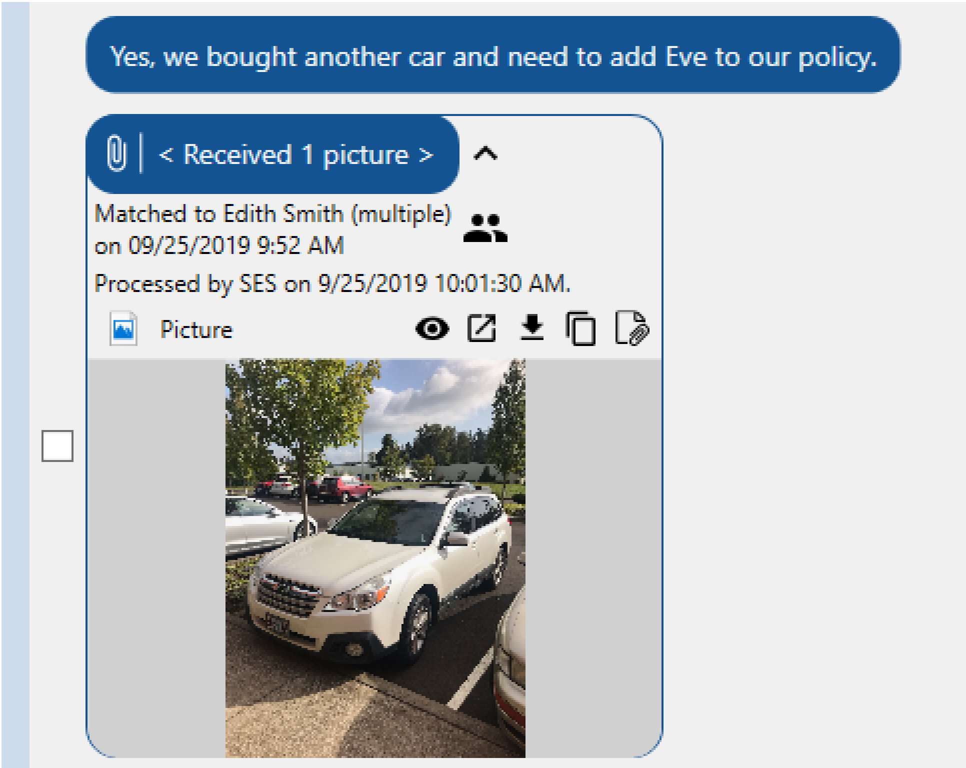
    Attach to CMS - launches the HawkSoft Virtual Printer, enabling you to add additional information about the PDF file. The PDF will be attached to the client file.

    If you select the "Use Action Menu" check box from the HawkSoft Virtual Printer, a log note will be created. As the content of the selected text messages is also copied to your clipboard, you can paste the text messages into the log note if you wish.



Processing attachments

Incoming text messages that contain attachments are designated with a paperclip icon. Hover your mouse near the message and click the down arrow to preview the attachment, view details about the message, and access available options for saving and processing the file.



Expand the message via the down arrow icon and select one of the following options:

- Drag and drop the attachment directly into the client's file
- View the attachment in an external window
- Download the attachment to your computer
- Copy the attachment to your clipboard
- Attach the document to the client's file within HawkSoft CMS.

  Selecting to attach the document to the client's file launches the HawkSoft Virtual Printer, enabling you to attach the image to the client or a specific policy with additional information.

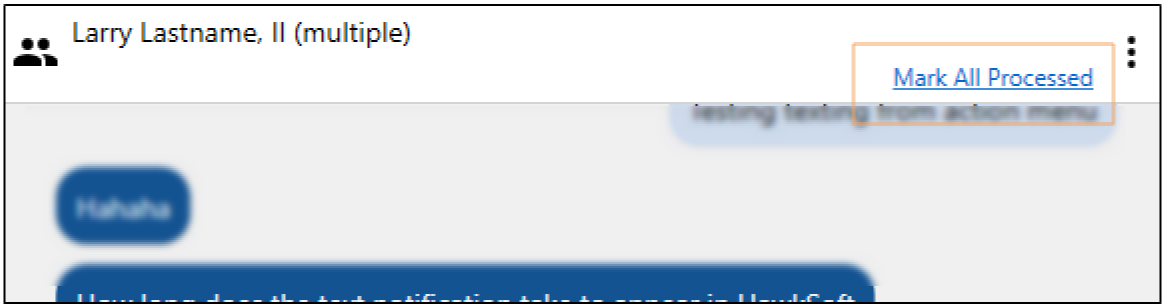
Once you've finished with the file, mark the text as processed.

Marking text messages as processed

Once you have taken any needed action on the client/policy and a log note from the conversation has been saved to the client file, return to the Texting window to mark the text messages as processed.

1. Open a texting view.
2. Select the check boxes on the left-hand side of the messages you want to process, and then click **Mark Processed** at the top of the Texting dialog.

   OR If all unprocessed texts are already recorded into a log note, you can click **Mark All Processed**.



Once processed, text messages are removed from the **My Texts** and **All Unprocessed Texts** views and text message counts. The text messages will always remain in the **Client Texts** window.

Related Topics

About HawkSoft Text Messaging
Text Message Notifications
Text Messaging Opt-In Compliance
Purchasing HawkSoft Text Messaging
Viewing & Sending Text Messages

Unmatched Texts

When your agency receives a text message from a number that does not match a cell number in a client file, the text is sent to the Unmatched Texts.

Your agency should monitor Unmatched texts and determine the identity of the texter so that their phone number can be added to the appropriate client file.

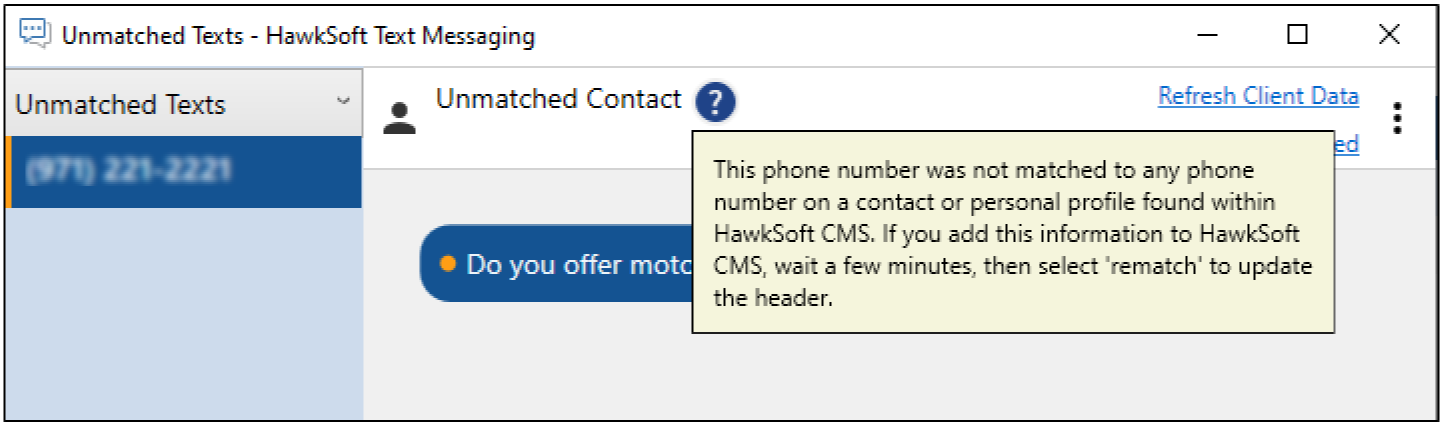
This topic explains how to match texts to a client file when using the HawkSoft Text Messaging feature.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text

messages directly from a client file. This feature enables you to use your existing mobile number.

See Text Messaging Overview for more information.

Matching texts to a client file



1. Establish the identity of the person sending the text. Since you are not able to reply to the number with a text message (unless they have opted in), the quickest method is likely to call the number.
2. Open the corresponding client file and use the **Action** button add the mobile number. Alternatively, if the individual does not yet have a client file, create one and add the number to the new file.
3. Return to the Unmatched Text message for the client and click **Refresh Client Data**.
4. If HawkSoft is able to match the phone number to a client file, the conversation will update with the matched client info but stay in *Unmatched view* until you exit the view. All text messages will now be associated with the client's file and appear in that client's *Client Text view*.
5. Close the Unmatched Texts view. You may process the texts from the Client Texts view. See Processing Text Messages for more information.

If you send a text message immediately after adding or updating a client file, the text message might temporarily appear in the Unmatched view. Wait a few minutes for the data to sync between HawkSoft CMS and HawkSoft Data Syncing, then click **Refresh Client Data**. The issue should resolve.

Related Topics

Processing Text Messages

About HawkSoft Text Messaging

Text Message Notifications

Text Messaging Opt-In Compliance

Viewing & Sending Text Messages

Text Message Notifications

HawkSoft CMS keeps your team updated on incoming text messages through real-time notifications and text counts.

This article explains how texting notifications work.

In this topic:

Notifications	Total Number of Unprocessed Text Messages	Follow a Client's Text Messages
Mute Notifications	Watching a Conversation	

As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.

See Text Messaging Overview for more information.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Search and Client Access > Access to Client Types > Access to Customer Types

See Setting User Permissions for more information.

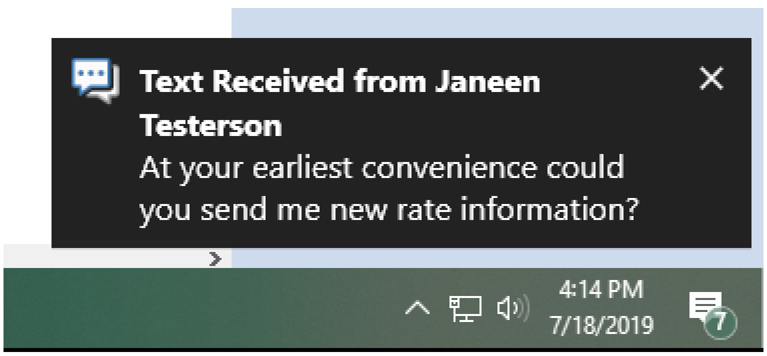
Notifications

Text message notifications are triggered for:

- Clients for which you are listed as a policy CSR or producer
- Clients you choose to follow
- Any unmatched text messages

Notifications appear as pop-ups on the bottom of your Window's screen and remain for a few seconds before disappearing. You must have notifications enabled from within your User Preferences panel for these to appear.

The notification's sound is determined by your Windows setting.



You can click on a notification to launch the text in one of the following windows:

- **My Texts** window with the most recent text message at the top of the queue
- **Client Texts** window if you are currently viewing that client
- **Unmatched Texts** window if the notification is for an unmatched number

Total number of unprocessed text messages

The **My Texts** icon  displays the number of unprocessed text conversations at the top of the HawkSoft CMS menu bar and next to the **My Texts** link on the left CMS side-bar. Text counts are updated every 60 seconds.

The text count will remain until you've marked text messages as processed. See our guide on Processing Text Messages for more information.

If you are a Texting Administrator, you will also see text counts accumulate next to the **All Unprocessed Texts** link on the left side-bar of HawkSoft CMS.

When you are actively texting with a client, you will likely keep the client texts window open. When this occurs, HawkSoft considers you to be "watching" the conversation and will mute notifications for other users following the client.

This prevents fellow users from receiving a rapid secession of notifications as the client replies to you, and prevents other users from replying to the client at the same time.

Be sure to close the client texting view when you are ready for other users to receive notifications of the client's replies.

To follow a client's text messages

If you want to stay updated on texts from clients for which you are *not* listed as a CSR or Producer, you can "follow" the client and receive text notifications.

You must have User Permissions to the client file to follow the text messages.

1. Open a client file.
2. Click **Client Texts** from the toolbar.
3. Check the **Follow Client** box in the top left of the text message window.

Future text messages from that client will appear in your **My Texts** view, and also appear as pop-up notifications.

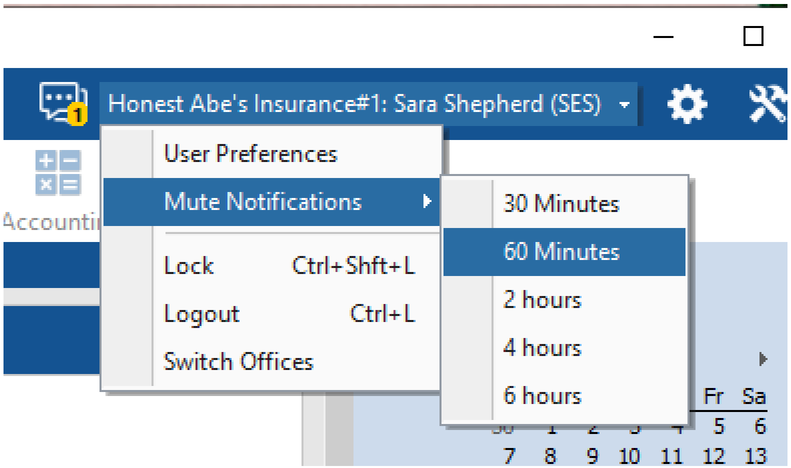
Multiple HawkSoft users can follow the same client. The client's texts will appear in each individual’s **My Texts** view.

If you are listed as a producer or CSR on a client’s policy, you cannot *unfollow* the client file text messages.

To mute notifications

You can temporarily mute pop-up notifications using the drop-down next to your user name.

1. Click on your user name at the top-right of the HawkSoft CMS window.
2. Select **Mute Notifications** and your desired mute period.



A muted icon  appears at the top of the CMS window until the muted time selected is over, or until you click the icon to end the mute early.

Texting counts will still update as normal while notifications are muted.

Watching a conversation

When you are actively texting with a client, you will likely keep the client texting window open. When this occurs, HawkSoft considers you to be "watching" the conversation and will mute notifications for other users following the client. This prevents fellow users from receiving a rapid secession of notifications as the client replies to you, and prevents other users from replying to the client at the same time.

However, if another user opens the Client Texting view for that client, they will receive notifications.

Be sure to close the Client Texting view when you are ready for other users to receive notifications of the client's replies.

Related Topics

About HawkSoft Text Messaging

Text Messaging Opt-In Compliance

Purchasing HawkSoft Text Messaging

Viewing & Sending Text Messages

Text Messaging with Email-to-SMS Services

HawkSoft CMS users who subscribe to a supported Email-to-SMS service and have completed Text Messaging Setup in CMS can send messages directly from a client file to a client's cell phone number.

This guide is for email-to-SMS texting integrations. For information about HawkSoft's built-in text messaging feature, see About HawkSoft Text Messaging.

See Text Messaging Setup (Email-to-text) for detailed steps to configure text messaging for each user.

Text messages are limited to 160 characters. Messages exceeding this limit may be cut off, or sent as separate messages by the SMS provider.

In this topic:

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Client File > Action Menu > Allow Sending Text Messages
>
> See Setting User Permissions for more information.

Creating and sending a text message using the Action menu

1. Retrieve the client file, and then select the **Client** tab or a policy within the file.

   > When using a template that contains policy level merge fields such as the Company Name or Policy Number, be sure to select a policy. See Text Message Templates for information on setting up a template.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Send Text Message**.

The **Text Message Recipients** dialog displays cell phone numbers that have been entered on the Client Name and Address Information screen for the selected client.

4. Select the cell phone number(s) for this message, and then click **OK**.

   OR

   To proceed without selecting a cell phone number, click **Skip**. This option allows you to manually enter a cell phone number in the **Send Text Message (SMS)** dialog.

   > If you have one or more Text Message Templates saved, the **Select Text Message (SMS) Template** dialog opens. Select a text message template, or **No Template**, and then click **OK**.
   >
   > See Text Message Templates for more information.

   The **Send Text Message (SMS)** dialog opens.

5. Edit the message as needed, and then click **Send**.

   > If the phone number was skipped in step 4, enter it in the **To** field.

6. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog box opens.

7. Add comments as needed, and then click **OK**.

Your text message is sent and a log note is created to document the text message in the client file.

Creating and sending a text message from the Client View screen

1. Retrieve the client file, and then select the **Client** tab or a policy within the file.

   > When using a template that contains policy level merge fields, such as the Company Name or Policy Number, be sure to select a policy. See Text Message Templates for information on setting up a template.

2. Click the underlined **Cell Phone** link in the Client Information pane of the client file view.

   The **Contact Information** dialog opens.

> Only the first few contact numbers or email addresses may be visible from the Client Information pane. To view additional contact information, click the **More** link.

3. Select the cell phone number for this message, and then click **Send Text**.

> If you have one or more Text Message Templates saved, the **Select Text Message (SMS) Template** dialog opens. Select a text message template, or **No Template**, and then click **OK**.
>
> See Text Message Templates for more information.

   The **Send Text Message (SMS)** dialog opens.

4. Edit the message, as needed, and then click **Send**.
5. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog box opens.

6. Add comments as needed, and then click **OK**.
7. Click **Close** to exit the **Contact Information** dialog.

Your text message is sent and a log note is created, documenting the text message in the client file.

Troubleshooting

The following error message has been encountered by new MessageMedia users:

"The messaging gateway could not process your request"

This error is typically a result of MessageMedia not having the user's email whitelisted in their system.

Contact MessageMedia at (866)751-8337 to work with them to whitelist the email address for the user profile in question.

Related Topics

Text Messaging Overview
Text Message Templates
Text Messaging Setup

Form Letters

HawkSoft CMS enables you to merge client and policy information from the client file into a letter, modify the letter as needed, and attach a copy for documentation purposes.

Once a letter is attached to the client file, you can perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

This article explains how to create and edit a letter from a client file using a previously created form letter template.

See Form Letter Templates for information on creating templates using the HawkSoft CMS Letter editor.

See Batch Mailing (Print) for information on creating and sending a form letter to a list of clients.

See Microsoft Word Form Letters for letters created using Microsoft Word.

In this topic:

Creating a Form Letter	Editing a Saved Copy

Required Permissions:
In order to complete this task, user permissions must be set to include:

Client File > Action Menu

See Setting User Permissions for more information.

Creating a form letter

1. Retrieve a client file, and then select the **Client** tab or a policy within that file.

> When using a template that contains policy level merge fields such as the Company Name or Policy Number, be sure to select a policy, not the **Client** tab.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create** > **Letter**.

   The **Form Letter** dialog opens.
4. Select a letter template.

   > Use the **Select Category** drop-down to filter the template list.
5. Click **OK**.

   A preview of the letter displays in the CMS Letter Editor.
6. Modify the letter, as needed.

   See Modifying Correspondence to learn about available editing options.
7. Optional: Save an editable copy to the Attachments List that can be opened and modified in the future.

   Click **File**, and then check **Save Editable Copy On Close**.

   When the letter is printed or attached, an editable copy as well as a PDF are saved to the client file..

   > Once a user selects **Save Editable Copy On Close**, that feature is enabled for all future letters and memos. Uncheck this option to turn this setting off for future letters.
8. Use the **File** menu to print and/or attach the letter.

   Print and Close – Select to print the letter. A PDF of the letter is attached to the log note and client file.

   The Print dialog opens. Modify settings as needed, and then click **Print**.

   Attach and Close – Select to attach a PDF to the log note and client file without printing.
9. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog opens.
10. Add comments as needed, and then click **OK**.

The letter is attached to the client file as a PDF and can be accessed from within the log note or from the Attachments tab. If **Save Editable Copy on Close** was selected, a second copy that can be edited, is also attached.

See Working with Attached Documents Overview to perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

Editing a saved copy

When an editable copy of the letter is saved and attached to the Attachments list, the letter can be modified and saved as a new attachment.

1. Retrieve the client file, and then select the appropriate policy, or the **Client** tab.
2. Select the **Attachments** tab.
3. Locate the editable copy of the letter.

   The Attachment **Type** column identifies the editable copy as a **Letter**. The PDF version is identified as an **Adobe Acrobat Document**.
4. Double-click the editable copy.

   The letter opens in the CMS Letter Editor.
5. Edit the letter, as needed.

   See Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview) to learn about available editing options.
6. Use the **File** menu to print and/or attach the letter.

   Print and Close – Select to print the letter. A PDF of the letter is attached to the log note and client file.

   The Print dialog opens. Modify settings as needed, and then click **Print**.

   Attach and Close – Select to attach a PDF to the log note and client file without printing.
7. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog opens.
8. Add comments as needed, and then click **OK**.

The modified letter is attached to the client file as a PDF. The original copy is still attached for future modifications. See Working with Attached Documents Overview to perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

Related Topics

Communications Overview
Form Letter Templates
Microsoft Word Form Letters
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Working with Word Documents

Microsoft Word Form Letters

This article explains how to edit form letters created in HawkSoft CMS, prior to version 3.04 and using Microsoft Word®.

This article does not apply to form letters created using the CMS Letter Editor.

See Form Letters and Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview) for more information.

In this topic:

Editing a Microsoft Form Letter	Adding a Merge Field	Deleting Unwanted Merge Fields

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Letter/Email/Proposal Templates

See Setting User Permissions for more information.

CMS supports form letter integration with Microsoft (MS) Word 2007, 2010, 2013, and 2016 "Professional" or "Home & Business". CMS does not support integration with MS Word academic versions, or any versions of MS Word older than 2007.

Editing a Microsoft Word form letter

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens with the **Form Letters** tab open.

2. Select the form letter you want to modify, and then click **Edit**.
3. MS Word launches the selected form letter.
4. Edit the letter as needed (see below).
5. When finished, **Save** the letter and close it.

> Exact steps vary depending on the version of MS Word being used. Please refer to MS Word's Help instructions for steps specific to your version of Word.

Adding a merge field

Place your cursor where the merge field should appear, and then click **Insert Merge Field** (a menu item or toolbar icon, depending on your version of Word).

See Merge Field Descriptions for definitions of each available merge field.

Formatting a merge field

1. Select the entire merge field, including the chevrons **<< >>**.
2. Right-click the highlighted field to access menu options for formatting.
3. Format the merge fields as desired, including punctuation and spacing.

Inserting user input fields

A user input field provides a way to insert information into a form letter that cannot be merged from CMS. For instance, if a client needs to relay information by a specific date for underwriting purposes, add a **Need By** user input field. When the letter is opened for printing, the user is prompted to insert the information before printing the letter.

1. Place your cursor where the input field should appear, and then:
    - **For MS Word 2003**, click **Insert Word Field** on the toolbar, and then select **Fill-in**.
    - **For MS Word 2007** and later, click the **Mailings** tab, click **Rules**, and then select **Fill-in**.

    > Exact steps vary depending on the version of MS Word being used. Please refer to MS Word's Help instructions for steps specific to your version of Word.

2. In the **Prompt** box, type a description of what the user will need to insert, for example, a **Need By** date.

    This prompt tells the user what information is needed to complete the letter.

    The **Default** fill-in text box is generally not used because it will automatically populate the field, rather than allow the user to enter the required information.

3. Finish adding the field according to MS Word's instructions.

Deleting unwanted merge fields

Select the entire field, including chevrons **<< >>**, and then press the **Delete** key.

Related Articles

Form Letter Templates
Merge Field Descriptions

Batch Mailing (Print)

HawkSoft CMS batch mailing enables your agency to send the same letter to all (or selected) clients from a report.

For example, you might want to create a Renewal Letter to all insureds renewing next month, or a Cancel Letter to all insureds who canceled last month.

If you have not already done so, create a template for your form letter. See instructions in the Form Letter Templates article.

In this topic:

Reports	Printing Letters	Printing Labels

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Sales & Retention (optional) > Create New Reports (if needed)

See Setting User Permissions for more information.

Reports

You can use the batch mailing feature with any of the following CMS reports:

Advanced Customized Reports

Agency Intelligence Reports

Sales and Retention Reports

Helpful hints for creating a customized Advanced report to generate batch mailings

- Select **Report By > Client (At least one policy must match criteria)**. This setting will minimize duplication of client files.
- **Add reporting fields** for any merge field used in your intended form letter. This will be helpful to determine clients and policies with missing information while reviewing the report and prior to printing the form letter.
- **Sort the report** by clicking on the column headers to look for any empty fields.

- **Reduce the number of letter recipients** by summarizing the report, for example by line of business, and then double-click on the group you are sending the letter to. Then batch print the letters from the summarized report.

  See Working with Report Data for information on summarizing the report.

Helpful hints for batch mailing from an Agency Intelligence or Sales & Retention report

- **Select a predefined report**

  For example: Sales & Retention report: No Active Auto, to target customers renewing in the next 60 days.

- **Double-click** in the cell with the customer count to drill-down to the customer information you need for creating the batch mailing.
- **Reduce the number of letter recipients** by summarizing the report, for example by line of business, and then double-click on the group you are sending the letter to. Then batch print the letters from the summarized report.

  See Working with Report Data for information on summarizing the report.

Printing letters

1. Once your letter template and report are created, open the report to select the clients you want to send letters to.
   - To select the entire report:

     Click **File** > **Print** > **Form Letters**.

   - To select specific items:

a. Press and hold the **Ctrl** key and select specific entries.

OR

To select a range of line items, select the first item, and then press the **Shift** key to select the last item to be included.

b. Click **File** > **Print** > **Form Letters**.

2. Complete the **Print Form Letters** dialog.

   a. **Form Letter** – Select the letter template that you want to print from the drop-down list.

   b. **Print Form Letter for** – This setting defaults depending on the selection made in step 1.

      - Defaults to **All**, if you did not select specific items
      - Defaults to **Selected Item(s)** if you selected specific line items

   c. Optional: Click **Preview** if the selected letter is a CMS form letter, to view the first fifty letters prior to printing.

   d. Optional: Check **Create log entry on each client printed** if you would like to create a log entry for each client receiving the letter.

      - Enter text in the box provided.
      - Optional: Create a suspense for each log entry.

   e. Click **OK**.

3. **Print** the batch of letters.

> You can print all letters to a single PDF file by selecting the Virtual Printer. This is useful when sending the letters to a 3rd party for printing.

- **CMS Form Letter** – If the selected letter was a **CMS Form Letter**, the **Print** dialog opens.

  Select your printer, and then click **Print**.

> A copy of the letter is attached to the client's log entry, if a log entry was created.

- **Microsoft Word Document** – If the selected letter was a **Microsoft Word Document**, Word will launch and display the merged letters.

  Print according to your version of Microsoft Word.

> A copy of the letter will not attach to the client's log entry.

Printing labels

For more information on downloading and customizing labels, see Mailing Labels.

1. Once your report is created, open the report to display the list of those clients you want to print labels for.
   - To select the entire report:

     Click **File** > **Print** > **Form Letters**.
   - To select specific items:
     a. Use the **Ctrl** key to select specific line items.

        OR

        To select a range of line items, select the first item, and then press the **Shift** key to select the last item to be included in the section.
     b. Click **File** > **Print** > **Form Letters**.
2. Select the label template from the **Form Letter** drop-down menu.
3. **Print labels for** – This setting defaults depending on selection made in step 1.
   - Defaults to **All**, if you did not select specific items
   - Defaults to **Selected Item(s)** if you selected specific line items
4. Optional: Create a log entry for each client printed, and suspend the log entry for follow-up, if needed.
5. Click **OK**.

MS Word opens and displays the data merged into the label template.

6. Click **File** > **Print**, and then follow on-screen prompts.

Related Topics

Advanced Customized Reports
Agency Intelligence Reports
Mailing Labels
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)
Sales and Retention Reports
Working with Report Data

Mailing Labels

HawkSoft CMS has the ability to print mailing labels through CMS Agency Reports. Templates for the most commonly used labels, Avery 5160 and Avery 8160, come installed with CMS as of version 3.04. The label templates contain merge fields for client name and address information.

To verify whether label templates are installed, or have already been downloaded, click **Setup** > **Correspondence Templates** from the main CMS menu bar. Mailing label templates are listed on the **Form Letters** tab.

In the event you need to download these templates, two versions are available from the download center:

- Avery 5160 or 8160 – Or Current Resident

  (Appends the addressee field with *Or Current Resident*)

- Avery 5160 or 8160

For instructions, see Mailing Labels, below.

Custom templates can be created for other labels as well.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports (Optional: Agency Intelligence or Sales and Retention Reports) > Create New Reports

Reports > Output of Reports > Allow Exporting, Printing, and Saving of Reports (You can select Only Allow Printing of Form Letters, Envelopes, Invoices, and Statements instead, as this permission also works for the basic task of creating and printing mailing labels.)

See Setting User Permissions for more information.

Microsoft Word® Integration must be enabled in General Settings in order to use label templates. Microsoft Word 2002 or newer must be installed on the computer used to generate labels.

Customizing Avery 5160 or 8160 labels

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   Mailing label templates are located on the Form Letters tab.

2. Right-click on the Avery label template you want to edit, and then click **Copy**.
3. Right-click anywhere in the **Title** list, and then click **Paste**.
4. Right-click on the copy, and then click **Rename**.
5. Rename the template as needed, and then click **OK**.

For example, *Policy Renewal Mailing Labels*.

6. Double-click the label template.

   MS Word opens the template as a Word document.

7. Edit the template as needed.

   > Exact steps may vary depending on the version of MS Word being used. Refer to MS Word Help instructions for steps specific to your version of Word.
   >
   > CMS merge fields are available in the MS Word **Insert Merge Field** drop-down list.

8. **Save**, and then close the document.

Downloading Avery 5160 or Avery 8160 labels

1. Visit the HawkSoft Download Center.

   > You can also visit http://download.hawksoftinc.com/ using your preferred web browser.

2. Enter *labels* (all lower-case) in both the **Username** and **Password** fields.

3. Click **Submit**.

   The **Save File** dialog box opens.

4. Select one of the label templates, and then click **Download File**.

5. Optional: Change the file name, and then click **Save**.

6. Click **Close** when the download is complete.

Using labels other than Avery 5160 or Avery 8160

For labels other than Avery 5160 or 8160 labels, you can create your own template in MS Word, and then add it to CMS. The CMS merge fields are then inserted in the template after it has been imported into CMS.

Exact steps may vary, depending on the version of MS Word being used. Refer to MS Word Help instructions for steps specific to your version of Word.

1. Open a new blank Word document.
2. Create a new label template.
3. Click **File** > **Save As**, and then browse to **[network drive]:\haw\letters** folder.
4. Name the new template, using the default file extension, and then click **Save**.

   For example, Holiday Mailing Labels.docx.

   To determine the correct path, click the **Help** icon, and then select **System Information** from the main CMS toolbar. Note the path for the HAW folder.

   The blank template is now installed in CMS.
5. Close the template file in MS Word.
6. Return to HawkSoft CMS.
7. Click Click the **Settings** icon, and then select **Correspondence Templates**.
8. Locate the new label template, and then double-click to launch it in Word.
9. Click the **Table Tools Layout** ribbon, and then click **View Gridlines** so the label fields are visible.

   HawkSoft, Inc. recommends using the Step-by-Step Mail Merge Wizard (found on the **Mailings** ribbon, under **Start Mail Merge**) to complete this process. See Microsoft Word Help for instructions.
10. Insert merge fields, and format the first label for final output, including font, size, spacing, and punctuation.

    CMS merge fields are available in the MS Word **Insert Merge Field** drop-down list.
11. **Save** and close the file.

Printing labels

1. Click **Reports** from the main CMS menu bar, and then select a report to create the list of clients you are mailing to.

   See Business Agency Reports Overview to determine which report to use.

   > If using Advanced Customized Reports, select **Report By > Client (At least one policy must match criteria)** when creating a mailing list report. This setting will minimize duplication of client files.

2. Optional: Select specific line items to generate labels for specific clients.
3. Click **File** > **Print** > **Form Letters** from the Report menu bar.
4. Select the label template from the **Form Letter** drop-down menu.
5. Select **All**, **Selected Items**, or enter a **Range of Items** (line item numbers) to determine the labels to be printed.
6. Optional: Create a log entry for each client printed, and suspend the log entry for follow-up, if needed.
7. Click **OK**.

   MS Word opens and displays the data merged into the label template.

8. Click **File** > **Print**, and then follow on-screen prompts.

Related Topics

Form Letters
Form Letter Templates
Microsoft Word Form Letters
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Advanced Customized Reports

DYMO Label Writer

Agencies can download a Microsoft Word® label template compatible with DYMO™ labels and then use it to print to a DYMO LabelWriter™. First, you must install the DYMO LabelWriter software. Please see the DYMO website for more information.

In this topic:

In order for HawkSoft CMS to integrate with the DYMO LabelWriter, MS Word needs to be installed on the computer to which the DYMO LabelWriter is connected. Please see HawkSoft CMS System Requirements for compatible versions of MS Word.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Form Letters

See Setting User Permissions for more information.

Downloading the DYMO Label template

1. Click **Utilities** > **Download Center** from the main CMS menu bar.
2. Type ***labels***, using lower-case letters, in the **Username** and **Password** fields.
3. Click **Login**.
4. Click DYMO Label Template, and then click **Download File**.

   The **Downloading File** dialog box opens.
5. Click **Close** when the download is complete.
6. Click the **X** in the upper right corner of the **Download Center** dialog box to close it.

Creating a custom DYMO LabelWriter template

1. Click **Settings** > **Correspondence** from the main CMS menu bar.
2. From the **Form Letters** tab, select the **DYMO Label** template.
3. Right-click, and then select **Copy**.
4. Right-click anywhere in the template list, and then click **Paste**.
5. Click the **Properties** button, rename the template, and then click **OK**.
6. Click the **Edit** button.

   CMS launches MS Word with the template open for editing.
7. Replace the default name and address fields with name/address fields of your choice.
8. Close the Word document.
9. Click **Yes** when prompted to save your changes.

Using the DYMO LabelWriter

Print a single label

1. Retrieve a client file, and then select a policy within that file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print**, and then select **Letter**.
4. Select **DYMO LabelWriter Template** (or a custom template if you have created one), and then click **Print**.

   MS Word opens the label template.
5. In the MS Word document, click the **DYMO** icon on the MS Word toolbar to print the label to the DYMO LabelWriter.

Print multiple labels

HawkSoft CMS allows you to print multiple labels at once from a report. For more information on printing labels from a report, see Mailing Labels.

Related Topics

Mailing Labels

Email

The HawkSoft CMS email feature provides the tools needed to create and send emails from within a client file or policy, and keep a documented history of those emails.

When emails are sent using CMS, a log note is created documenting the date, time, sender, recipient, and content of the email. Emails are automatically attached to the selected client file or policy, and can be accessed from the Attachments list as well as from the log note.

> For emails to automatically attach to log notes and to the Attachments List, you must have the **Auto Attach Sent Emails** setting selected in General Settings. The instructions in this article assume that you have the setting turned on. See Email.

In this topic:

Setup and Configuration	Drag and Drop Emails into a Client File	Sending an Email from the Action Menu
Sending an Email from the Client File View	Emailing Files from the Attachments List	Replying to or Forwarding an Attached Email

> Required Permissions:
> To perform this task, no specific CMS user permissions are required.

Setup and configuration

You can configure CMS to automatically attach a copy of an email to a log note, as well as to the Attachments list.

Optional: To configure CMS to automatically attach:

1. Click the **Settings** icon, and then select, **General Configuration**.

   The **General Settings** screen opens.

2. Select the **Auto Attach Sent Emails** setting.

See General Settings for more information.

Prior to creating and sending emails, CMS needs to be configured with your email provider. See User Email Setup for setup instructions.

CMS also enables you to create Email Templates for composing standardized emails to send to clients. See Email Templates for more information.

Drag and drop emails into a client file

Although emails are not received by CMS, you can drag and drop emails from your email program, into the Attachments list on a client or policy.

> Web-based email programs do not enable you to drag and drop emails.

Once the email is in the Attachments list, you can open the email for viewing, and reply to or forward the email. See Email below.

Sending an email from the Action Menu

You can create and send emails from within a client file or policy using the Action menu. A copy of the email will be attached to both the log note and to the Attachments List.

> For emails to automatically attach to log notes and to the Attachments List, you must have the **Auto Attach Sent Emails** setting selected in General Settings. The instructions in this article assume that you have the setting turned on. See Email.

To attach a document to your email, you can drag and drop a file from your *computer* to your new email, or use the Attach button in the Email editor. To send a document directly from a *client file*, see Email below, rather than using the Action menu.

1. Retrieve a client file, and then select the **Client** tab or a policy within that file.

> When using a template that contains policy level merge fields such as the Company Name or Policy Number, be sure to select a policy. See Email Templates for information on setting up a template.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.

> If selecting the Internal option, you will need permissions to Internal Print/Blank ACORD Forms/Send Email.

3. Select **Send Email**.

   The **Email Recipients** dialog opens.

4. Select or enter the recipients of the email.

Email Recipients

To display email addresses from your CMS database, select any of the available check boxes for the recipient types. The email addresses entered in your CMS database will be included in the list for each recipient type selected.

First Check box – Select this check box to include all email addresses entered for the client file.

The first check box is determined by the Client Type selected on the Name and Address screen in the selected client file. For example, if the selected client file is a Vendor, you will see a Vendor check box.

> This check box will display Lead or Prospect if the Client Type is set to Customer and the Status is set to Prospect or Lead.

See Client Name and Address Information for instructions on entering client contact information.

Policy Carrier – Select to include all email addresses for the carrier on the selected policy. If the Client tab is selected, you will see carrier email addresses for each policy on the Client/Policy bar.

See Policy/Company Setup: Company Info for instructions on entering contact information for the carrier.

Policy Agent(s) – Select Policy Agents to include all email addresses for Agent 1, 2, and 3 listed on the policy, as well as the customer Producer and CSR.

All Users – Select to include email addresses for all email Users in CMS.

Client Type – Select this check box, and then select the type of client from the drop-down. When a client type is selected, all email addresses from your entire database are listed for that client type.

See User Contact Information for instructions on entering user contact information.

Select a recipient from the list, and then click **To**, **Cc**, or **Bcc**, to insert the address in that field.

To manually enter a recipient, type the email address in the **To**, **Cc**, or **Bcc** field. Use a **;** semicolon to separate multiple entries.

5. Click **OK** once you have finished selecting recipients.

   The **Select Email Template** dialog box opens.

6. Select an email template from the list or select ****No Template****.

   Selecting a template:

   Optional: Select a template category from the available **Select Category** drop-down to filter the list of templates.

   See Email Templates for instructions on setting up templates.

> If a user’s email integration is set to use MAPI and an email template containing HTML or the **No Template** option is chosen, all HTML formatting is removed because MAPI does not support HTML emails.
>
> For more information see Email Templates.

7. Optional: Select the **Add customer/policy information to Subject line** check box.

   When checked, the customer name and policy number will display in the subject line of the email, unless the selected template contains a subject line.

8. Click **OK**.

   The **New Message** window launches.

9. Complete the body of the email.

   See Modifying Email for instructions on adding elements and making formatting changes to emails created in the CMS Email Message window.

   > For **Outlook** Email users, CMS makes it is easy to modify your email templates in Correspondence Setup. See Modifying Email Templates for details. If you need to modify an email outside of the templates, you need to refer to Outlook's Help for options.

10. Optional: To attach a document to your email, you can drag and drop an attachment from your *computer* to your new email, or use the **Attach** button in the Email editor.

11. Click **Send**.

    If your email integration is set to MAPI, you might need to click **Allow**.

12. Click **Finish** to close the Action menu.

    The Add Log Entry Comments dialog box opens.

13. Add comments as needed, and then click **OK**.

    The body of the email and a link to open the email are included in the log note.

    The email is also listed in the Attachments list for the selected client or policy.

Sending an email from the client file view

You can create and send an email directly from the Client Information Pane when viewing a client. The client file view displays email addresses entered in the **Contact** section of the Name and Address screen when adding or modifying a client.

See Tour of the Client File for more information on the client view.

A copy of the email will be attached to both the log note and to the Attachments list.

1. Retrieve a client file, and then select the Client tab.

   Email addresses are listed in the Client Information Pane.

2. Click on the underlined email type (Home, Work, Other) to open the **Contact Information** viewer.

   If additional email addresses can't fit in the panel, click the underlined **More** link to view all email addresses.

3. Click the **Email** button.

   The **Email Recipients** dialog opens.

4. Select or enter the recipients of the email.

   ## Email Recipients

   To display email addresses from your CMS database, select any of the available check boxes for the recipient types. The email addresses entered in your CMS database will be included in the list for each recipient type selected.

   > ***First Check box*** – Select this check box to include all email addresses entered for the client file.
   >
   > The first check box is determined by the Client Type selected on the Name and Address screen in the selected client file. For example, if the selected client file is a Vendor, you will see a Vendor check box.
   >
   > This check box will display Lead or Prospect if the Client Type is set to Customer and the Status is set to Prospect or Lead.

See Client Name and Address Information for instructions on entering client contact information.

Policy Carrier – Select to include all email addresses for the carrier on the selected policy. If the Client tab is selected, you will see carrier email addresses for each policy on the Client/Policy bar.

See Policy/Company Setup: Company Info for instructions on entering contact information for the carrier.

Policy Agent(s) – Select Policy Agents to include all email addresses for Agent 1, 2, and 3 listed on the policy, as well as the customer Producer and CSR.

All Users – Select to include email addresses for all email Users in CMS.

Client Type – Select this check box, and then select the type of client from the drop-down. When a client type is selected, all email addresses from your entire database are listed for that client type.

See User Contact Information for instructions on entering user contact information.

Select a recipient from the list, and then click **To**, **Cc**, or **Bcc**, to insert the address in that field.

To manually enter a recipient, type the email address in the **To**, **Cc**, or **Bcc** field. Use a **;** semicolon to separate multiple entries.

5. Click **OK** once you have finished selecting recipients.

   The **Select Email Template** dialog box opens.

6. Select an email template from the list or select ****No Template****.

   Selecting a template:

   Optional: Select a template category from the available **Select Category** drop-down to filter the list of templates.

   See Email Templates for instructions on setting up templates.

If a user’s email integration is set to use MAPI and an email template containing HTML or the **No Template** option is chosen, all HTML formatting is removed because MAPI does not support HTML emails.

For more information see Email Templates.

7. Optional: Select the **Add customer/policy information to Subject line** check box.

   When checked, the customer name and policy number will display in the subject line of the email, unless the selected template contains a subject line.

8. Click **OK**.

   The **New Message** window launches.

9. Complete the body of the email.

   See Modifying Email for instructions on adding elements and making formatting changes.

   For **Outlook** Email users, CMS makes it is easy to modify your email templates in Correspondence Setup. See Modifying Email Templates for details. If you need to modify an email outside of the templates, you need to refer to Outlook's Help for options.

10. Optional: To attach a document to your email, you can drag and drop an attachment from your *computer* to your new email, or use the **Attach** button in the Email editor.

11. Click **Send**.

    If your email integration is set to MAPI, you might need to click **Allow**.

12. Click **Finish** to close the Action menu.

    The Add Log Entry Comments dialog box opens.

13. Add comments as needed, and then click **OK**.

    The body of the email and a link to open the email are included in the log note.

    The email is also listed in the Attachments list for the selected client or policy.

14. Click **Close** to close the Contact Information viewer.

Emailing files from the Attachments List

You can select documents from the *Attachments list* to send an email with the documents attached. To email a document from your *computer* (not from the Attachments list), see Email.

1. Retrieve a client file, and then select the **Client** tab or a policy within the file.
2. Click the **Attachments** tab.
3. Select the attachment(s) you want to email.

   To select multiple attachments, hold down the CTRL key, and click on each item you want to send.

   > Most email providers limit the size of an email to 20 MB or less. If too many attachments are selected, you might not be unable to send the email.

4. Right-click on any of the selected items, and then click **Email** > **Send as Attachment**.

   The **Email Recipients** dialog opens.

5. Select or enter the recipients of the email.

Email Recipients

To display email addresses from your CMS database, select any of the available check boxes for the recipient types. The email addresses entered in your CMS database will be included in the list for each recipient type selected.

First Check box – Select this check box to include all email addresses entered for the client file.

The first check box is determined by the Client Type selected on the Name and Address screen in the selected client file. For example, if the selected client file is a Vendor, you will see a Vendor check box.

> This check box will display Lead or Prospect if the Client Type is set to Customer and the Status is set to Prospect or Lead.

See Client Name and Address Information for instructions on entering client contact information.

Policy Carrier – Select to include all email addresses for the carrier on the selected policy. If the Client tab is selected, you will see carrier email addresses for each policy on the Client/Policy bar.

See Policy/Company Setup: Company Info for instructions on entering contact information for the carrier.

Policy Agent(s) – Select Policy Agents to include all email addresses for Agent 1, 2, and 3 listed on the policy, as well as the customer Producer and CSR.

All Users – Select to include email addresses for all email Users in CMS.

Client Type – Select this check box, and then select the type of client from the drop-down. When a client type is selected, all email addresses from your entire database are listed for that client type.

See User Contact Information for instructions on entering user contact information.

Select a recipient from the list, and then click **To**, **Cc**, or **Bcc**, to insert the address in that field.

To manually enter a recipient, type the email address in the **To**, **Cc**, or **Bcc** field. Use a **;** semicolon to separate multiple entries.

6. Click **OK** once you have finished selecting recipients.

   The **Select Email Template** dialog box opens.

7. Select an email template from the list or select ****No Template****.

   Selecting a template:

Optional: Select a template category from the available **Select Category** drop-down to filter the list of templates.

See Email Templates for instructions on setting up templates.

> If a user's email integration is set to use MAPI and an email template containing HTML or the **No Template** option is chosen, all HTML formatting is removed because MAPI does not support HTML emails.
>
> For more information see Email Templates.

8. Optional: Select the **Add customer/policy information to Subject line** check box.

   When checked, the customer name and policy number will display in the subject line of the email, unless the selected template contains a subject line.

9. Click **OK**.

   The **New Message** window launches with the item(s) already attached.

10. Complete the body of the email.

    See Modifying Email for instructions on adding elements and making formatting changes.

    > For **Outlook** Email users, CMS makes it is easy to modify your email templates in Correspondence Setup. See Modifying Email Templates for details. If you need to modify an email outside of the templates, you need to refer to Outlook's Help for options.

11. Click **Send**.

    If your email integration is set to MAPI, you might need to click **Allow**.

12. Click **Finish** to close the Action menu.

    The Add Log Entry Comments dialog box opens.

13. Add comments as needed, and then click **OK**.

    The body of the email and a link to open the email are included in the log note.

    The email is also listed in the Attachments list for the selected client or policy.

Replying to or forwarding an attached email

CMS enables you to open, and reply to or forward, an email from the Attachments list or from a log note.

From the Attachments list

1. Retrieve a client file, and then select the **Client** tab or a policy within the file.
2. Click the **Attachments** tab.
3. Right-click on an attached email, and then select one of the following options:
   - **Email** > **Reply** – Select to reply to the sender of the selected email.
   - **Email** > **Reply All** – Select to reply to the sender, as well as all recipients of the selected email.
   - **Email** > **Forward** – Select to forward the selected email to a new recipient.
   - **Email** > **Send as Attachment** – Select to create a new email with the selected email attached.

   The New Message window opens.
4. Select or enter recipients.
5. Complete the body of the email.

   See Modifying Email for instructions on adding elements and making formatting changes.

   > For **Outlook** Email users, CMS makes it is easy to modify your email templates in Correspondence Setup. See Modifying Email Templates for details. If you need to modify an email outside of the templates, you need to refer to Outlook's Help for options.
6. Click **Send**.

Depending on your email settings, you might need to click **Allow**.

7. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog box opens.

8. Add comments as needed, and then click **OK**.

   The body of the email and a link to open the email are included in the log note.

   The email is also listed in the Attachments list for the selected client or policy.

   > For emails to automatically attach to log notes and to the Attachments List, you must have the **Auto Attach Sent Emails** setting selected in General Settings. The instructions in this article assume that you have the setting turned on. See Email

From a log note

When replying to an email attached to a log note, a new log note is created and linked to the original log note.

1. Retrieve a client file, and then select the **Client** tab or a policy within the file.
2. From the Log Notes window, double-click on the log note that contains the attached email.
3. From the **View Log** window, click on the attached email.

   The email opens in the CMS Email viewer.

4. Select **Reply**, **Reply All**, or **Forward**.

   The New Message window opens.

   > If the new message window does not open, click your Email icon in your taskbar to open the viewer.

5. Select or enter recipients.

Email Recipients

To display email addresses from your CMS database, select any of the available check boxes for the recipient types. The email addresses entered in your CMS database will be included in the list for each recipient type selected.

> ***First Check box*** – Select this check box to include all email addresses entered for the client file.
>
> The first check box is determined by the Client Type selected on the Name and Address screen in the selected client file. For example, if the selected client file is a Vendor, you will see a Vendor check box.
>
> > This check box will display Lead or Prospect if the Client Type is set to Customer and the Status is set to Prospect or Lead.
>
> See Client Name and Address Information for instructions on entering client contact information.
>
> **Policy Carrier** – Select to include all email addresses for the carrier on the selected policy. If the Client tab is selected, you will see carrier email addresses for each policy on the Client/Policy bar.
>
> See Policy/Company Setup: Company Info for instructions on entering contact information for the carrier.
>
> **Policy Agent(s)** – Select Policy Agents to include all email addresses for Agent 1, 2, and 3 listed on the policy, as well as the customer Producer and CSR.
>
> **All Users** – Select to include email addresses for all email Users in CMS.

Client Type – Select this check box, and then select the type of client from the drop-down. When a client type is selected, all email addresses from your entire database are listed for that client type.

See User Contact Information for instructions on entering user contact information.

Select a recipient from the list, and then click **To**, **Cc**, or **Bcc**, to insert the address in that field.

To manually enter a recipient, type the email address in the **To**, **Cc**, or **Bcc** field. Use a **;** semicolon to separate multiple entries.

6. Complete the body of the email.

   See Modifying Email for instructions on adding elements and making formatting changes.

   > Pasting images into the CMS Email Editor is not currently supported.

7. Click **Send**.

   Depending on your email settings, you might need to click **Allow**.

8. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog box opens.

9. Add comments as needed, and then click **OK**.

   The body of the email, and a link to open the email are included in the log note. The original log note and original email are also included in the new log note.

   See Linking Log Notes for more information.

   The email is listed in the Attachments list for the selected client or policy.

For emails to automatically attach to log notes and to the Attachments List, you must have the **Auto Attach Sent Emails** setting selected in General Settings. The instructions in this article assume that you have the setting turned on. See Email.

Related Topics

Drag and Drop Documents
Email Templates
Modifying Email
Modifying Email Templates

Modifying Email

HawkSoft CMS enables you to make formatting changes and insert merge fields and logos into your emails when using the CMS Email Message window.

For **Outlook** Email users, CMS makes it is easy to modify your email templates in Correspondence Setup. See Modifying Email Templates for details. If you need to modify an email outside of the templates, you need to refer to Outlook's Help for options. This article applies only when creating an email using the CMS New Message window.

See Communications Overview and Correspondence Setup Overview for more information about the different types of correspondence in CMS, and how to create and use templates.

- **Letters, Memos, Proposals, and the Policy Overview** – To modify correspondence, see Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview) for details about editing.
- **Text Messaging** – To format a text message, see Text Messaging with Email-to-SMS Services.

This article describes the various formatting options available when modifying emails within CMS.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

How do I get here?

See Email for the different options and required permissions for sending an email. During the process of sending an email, you can make modifications, as described in this article, in the CMS Email message window.

Adding merge fields

Merge fields are used to insert information from client or policy files into emails at the time it is generated. For example, you can insert a merge field to include a policy number or carrier name in correspondence.

Some field selections activate the **Merge Field Properties** dialog. Follow on-screen prompts to insert the field.

1. With the Email message window open, position your cursor where the merge field information should appear, and then click **Insert** > **Field** from the editing menu bar.

   The **Select Merge Field to Insert** dialog opens.

2. Select a field from the list.

   Use the **Filter Fields** and **Filter Category** to quickly find a field name.

3. Optional: If available, select a capitalization format for the field from the **Formatting** drop-down list.
    - **Proper Case** – The first letter of each word is capitalized.
    - **Upper Case** – All letters are capitalized.
    - **Lower Case** – All letters are lower case.
4. Click **Insert**.

    The merge field is inserted and the dialog stays open to add more fields if necessary.
5. Reposition your cursor to insert another merge field, as needed.
6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all fields have been inserted.

Formatting merge fields

Edit the font, font size, or color

1. Highlight the entire field, including chevrons: <<text>>.
2. Modify the field, as needed.

    Use the Format menu or toolbar icons to apply formatting and edit the font, font size, or color.

Delete a merge field

1. Highlight the entire field, including chevrons: <<text>>.
2. Press **Delete** on your keyboard.

Adding images/logos to email

Inserting an image into an email does not insert the actual image. The image URL (address) is added to the email. When the email is received, the computer must access the Internet and download the image into the email. Images stored on a computer or internal intranet will not be seen by the email recipient.

Pasting images into a CMS Email is not currently supported.

1. With the Email message window open, position your cursor, and then click **Insert** > **Image**.

   The **Image URL** dialog opens.

2. Enter the image URL.
3. Click **OK**.

Adding website links to an email template

1. With the Email message window open, highlight the text to be used for the link.
2. Click **Insert** > **Hyperlink**.

   The **Hyperlink** dialog box opens.

3. Select the hyperlink type from the **Type** drop-down list.
4. Enter the web address in the **URL** field.
5. Click **OK**.

Click **Save**, and then click the X to close the Email message window when all changes are made.

Related Topics

Communications Overview
Correspondence Setup Overview
Modifying Email Templates

Batch Emails

HawkSoft CMS enables your agency to send the same email to a selected group of clients in one batch. This article describes how to use a report to send a form email to a large list of customers or prospects.

For information on configuring HawkSoft CMS to send batch emails, please see Batch Email Setup [+Video].

Batch emailing is done at the agency's own risk.

- HawkSoft, Inc. is not liable for actions taken by an ISP, a mail hosting service, or other email filtering services.
- It is the agency's responsibility to know and understand their ISP or mail host provider's rules regarding email.
- Certain state and federal laws may apply to your batch emails, depending on the type of emails being sent. Violating these laws may result in legal action being taken against the agency. It is the agency's responsibility to know and follow the laws of their jurisdiction regarding mass emails.
- Violation of your mail provider's rules could result in black-listing, closing of your email account(s) or flagging your email account as a source of spam.
- Configuring the HawkSoft CMS batch email service to comply with your ISP or mail host service rules, and creating email templates that are spam filter friendly, are the responsibility of the agency.

In this topic:

Creating a Report	Sending a Batch Email	Track or Cancel Batch Emails

Setting user permissions is typically performed by an Owner/Administrator.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Agency Intelligence (optional) > Sales & Retention (optional) > Create New Reports (if needed) > Batch Email

See Setting User Permissions for more information.

Creating a report

The first step in sending batch emails, is to run a report with a list of clients to send the email to. You can use the batch email feature with any of the following reports:

Advanced Customized Reports

Agency Intelligence Reports

Sales and Retention Reports

Helpful hints for creating a customized Advanced Report to generate batch emails

- Select **Report By > Client (At least one policy must match criteria)**. This setting will minimize duplication of client files.
- **Add reporting fields** for any merge field used in your intended email. This will be helpful to determine clients and policies with missing information while reviewing the report, and prior to sending the email.
- **Sort the report** by clicking on the column headers to look for any empty fields.
- **Reduce the number of email recipients** by summarizing the report, for example by line of business, and then double-click on the group you are sending the email to. Then batch print the letters from the summarized report.

  See Working with Report Data for information on summarizing the report.

Helpful hints for batch emailing from an Agency Intelligence or Sales & Retention report

- **Select a predefined report**

  For example: Sales & Retention report: No Active Auto, to target customers renewing in the next 60 days.

- **Double-click** in the cell with the customer count to drill-down to the customer information you need for creating the batch email.

- **Reduce the number of letter recipients** by summarizing the report, for example by line of business, and then double-click on the group you are sending the letter to. Then batch print the letters from the summarized report.

  See Working with Report Data for information on summarizing the report.

Sending a batch email

1. Once your report is created, open the report to select the clients you want to send the batch email to.

   - To select the entire report:

     Click **File** > **Send Email**.

     > If Batch Email has not been configured correctly, you will be presented with an error message. See Batch Email Setup [+Video] for instructions.

   - To select specific items:

     a. Press and hold the **Ctrl** key and select specific entries.

        OR

        To select a range of line items, select the first item, and then press the **Shift** key to select the last item to be included.

     b. Click **File** > **Send Email**.

   The **Select Email Template** dialog opens.

2. Select an email template (or **No Template**) from the drop-down list.

> Avoid using a template that includes User Input merge fields. If User Input is included, you will be prompted for every email in your batch. See Modifying Email Templates for more information on User Input fields.

See Email Templates for more information.

3. Select which items to email, depending on the selection made in step 1.
   - **All Items** – Select to send an email to all clients on the report.
   - **Selected Item(s)** – Select this option if you selected specific items or a group of items.
   - **Range of Items** – Enter a range of line items to only send emails to those clients.
4. Optional: Select **Create log entry for each client emailed**.

   A log note will be added to each client or policy included in the batch, and will include the body of the email.
5. Optional: Select **Attach a copy of Email to each client**. A copy of the email will be included in the Attachments list, as well as the log note in each client/policy.

   This is only available if **Create a log entry for each client** is selected.

   > For larger emails, this option can take up a lot of space in your database because a copy of each email is added to every client or policy included in the batch.
6. Optional: Select **Suspend Transaction (Tickler)**. A suspense will be set for each email sent.

   This is only available if **Create a log entry for each client** is selected.

   Complete the additional Suspense fields.

   See Suspending a Log Note for more information.
7. Click **OK**.

   The **Email from Report** window opens.

8. Select the CMS email address type from the **To** drop-down menu (Primary, Primary Home, All, etc.).

   The email address is assigned based on the email address entered in the **Contact Info** section of the Client Name and Address Information screen. If "Primary" is selected, the email will be sent to the first email listed in the Contact Information.

9. Fill in the **Subject** line.

10. Complete the body of the email.

    If a template was selected, review the email for any needed changes.

    See Modifying Email for more information.

11. Click **Send**.

    The **Start Report Generator Email Process** dialog opens.

12. Optional: Complete the following email settings:

    Notification

    a. Optional: Enter the email address where you want to send a confirmation when the emails have been sent.

    b. Optional: Click **Test Email** to verify the notification will be sent correctly.

    Options

    a. Enter a name to help identify the emailed report.

       If an email template was selected, the template name appears in this field.

    b. Set a start date and time for the email to begin sending.

    c. Select whether to send the email **One per Policy**, or **One per Client**.

       - **One per Policy** – If selected, CMS will send multiple emails to the same client if more than one policy is selected for that client on the report. You might choose this option when using an email template that contains policy related merge fields.
       - **One per Client** – If selected, CMS will send the email only to the first instance of the client in the report.

    Advanced Settings

Optional: Check **Override client's Mass Email setting** to ignore the Mass Email setting in each client file. This option is set in the **Contact Info** section of the Client Name and Address Information screen.

> Use this setting cautiously. This setting will send an email to the client even if they have specifically opted out of mass emails from your agency.

13. Click **Start**.

    You can now close the Report. A confirmation report email is sent to the address indicated in the Notification field in the **Start Report Generator Email Process** dialog when the batch email is complete.

Track or cancel batch emails

- **For pending or currently running batch emails**

  You can check the status of a batch email and pause or cancel the process if needed.

  a. Right-click the **HawkSoft Batch Emailer** icon found in the Windows System Tray (the hidden icons near the clock of the Windows Taskbar).

  b. Select **Open** to view batch email details on the **Batch Emailer** dialog.

     Pause Process – Click to temporarily pause the batch emails. You can click **Start Processing** to resume at any time.

     Exit – Click to cancel the batch email from this dialog.

     > To cancel, you can also right-click on the Task bar, select **Task Manager**, and then select **Batch Emailer** and click **End Task**.

- **For completed batch emails**

  You can run the Batch Email Report for details for a completed batch.

  1. Click **Reports** > **Batch Email Reports** from the main CMS menu bar.
  2. Double-click on any batch listed on the report for details.

3. Close the report when you are done reviewing.

Related Topics

Base Templates
Email Templates
Modifying Email
Advanced Customized Reports

Memos

HawkSoft CMS enables you to use pre-formated templates to create memos intended for an insured, company, or additional interest as the recipient. Each template contains relevant merge fields, depending on the recipient of the memo.

Additional correspondence that does not fit into one of these three categories should be created using a form letter or email.

See Base Templates for more information on modifying existing memo templates.

See Form Letters and Email for more information.

In this topic:

Creating and Printing a Memo	Editing and Printing a Working Copy

Required Permissions:
In order to complete this task, user permissions must be set to include:

Client File > Action Menu

See Setting User Permissions for more information.

Creating and printing a memo

1. Retrieve a client file, and then select the **Client** tab or a policy within that file.

   > When using a template that contains policy level merge fields such as the Company Name or Policy Number, be sure to select a policy. See Base Templates for information on setting up a template.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create** > **Memo**.
4. Select one of the following:
   - **To Insured**
   - **To Company**
   - **To Additional Interest**

     If more than one Additional Interest exists on the policy, you will be prompted to select one.

   The CMS Letter Editor opens.

5. Replace **<<Body of Letter>>** with the content of your memo.
6. Optional: Save a working copy that can be opened, edited, and printed again.

   Click **File**, and then check **Save Working Copy On Close**.

   By default, CMS attaches a copy of the memo, which cannot be edited. Selecting **Save a Working On Close** creates a second copy that can be modified, if needed.

   > Once a user selects **Save Working Copy On Close**, that feature is enabled for all future letters and memos. Uncheck this option to turn this setting off for future letters.

7. Use the **File** menu to print and/or attach the memo.

   Print and Close – Select to print the memo. A PDF of the memo is attached to the log note and client file.

   The Print dialog opens. Modify settings as needed, and then click **Print**.

Attach and Close – Select to attach a PDF to the log note and client file without printing.

8. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog opens.

9. Add comments as needed, and then click **OK**.

   The memo is attached to the client file as a PDF and can be accessed from within the Log Note or from the Attachments tab. If **Save Working Copy On Close** was selected, a second copy which can be edited, is also attached.

Editing and printing a working copy

When the **Save Working Copy On Close** feature is enabled, a working version of the memo is attached to the client file, as well as the permanent PDF document. This working copy can be edited and resent to the recipient manually.

1. Retrieve the client file, and then select the appropriate policy, or the **Client** tab.
2. Select the **Attachments** tab.
3. Locate the working copy of the memo you want to edit.

   The Attachment **Type** column identifies the working copy with the label **Letter**. The PDF version is identified as an Adobe Acrobat Document.

4. Double-click the working copy.

   The letter opens in the The CMS Letter Editor.

5. Edit the memo, as needed.

   See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) to learn about available editing options.

6. Use the **File** menu to print and/or attach the memo.

   Print and Close – Select to print the memo. A PDF of the memo is attached to the log note and client file.

   The Print dialog opens. Modify settings as needed, and then click **Print**.

Attach and Close – Select to attach a PDF to the log note and client file without printing.

The Add Log Entry Comments dialog opens.

7. Add comments as needed, and then click **OK**.

The modified memo is attached to the client file as a PDF. The original working copy is still attached for future modifications. See Working with Attached Documents Overview to perform actions from the Attachments List, such as emailing the memo or sending the memo for an electronic signature.

Related Topics

Base Templates
Email
Form Letter Templates
Form Letters
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Text Messaging with Email-to-SMS Services

Proposals

HawkSoft CMS enables you to create proposals to market or re-market to prospective and existing clients.

CMS includes three types of documents that together, create a proposal. Each of these documents are based on a customizable template.

- **Cover Letter** – A basic letter template.
- **Line of Business** – The lines of business in a proposal template include the ACORD Terms and Definitions, where applicable, and merge fields to insert data from client or policy files.
- **Post Letter** – The post letter is blank by default and is fully customizable.

This article explains how to create proposals in CMS using these three templates.

For information on creating templates, please see Proposal Templates.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Client File > Action Menu

See Setting User Permissions for more information.

Creating a proposal

At any point while creating a proposal, you can click **Finish Later** to save your proposal and return to it for completion at a later time.

See Proposals and Proposals, below.

1. Retrieve a client file, and then select the **Client** tab or a policy within the file.

   The proposal will be added to the Attachments list of the selected Client or policy tab.

2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.

3. Click **Print/Create** > **Proposals**.

   The **Proposal Manager - Proposals** dialog opens.

4. Click **New**.

   The **Proposal Template Selection** dialog opens with the current date entered as the default **Proposal Name**.

5. Optional: Modify the **Proposal Name**.

6. Select one or more policies to include in this proposal, and then click **Next**.

The **Proposal Template Selection** dialog refreshes. A blue arrow indicates the item you are selecting a template for.

7. Select a template from the **Use the following Template** drop-down list at the bottom of the dialog.

   To print a proposal without a cover or post letter, leave the selection set at **<None>**, and then click **Next**.

   The **Current template selections** box is updated with the name of the selected template.

8. Optional: Click **Edit** to modify the selected template.

   The CMS Letter Editor launches the template.

   a. Edit the template, as needed.
   b. Click **Save & Close**.

   (Edited) now appears as part of the template name.

9. Click **Next**.

   A green checkmark displays next to the completed section.

   The blue arrow advances to the next proposal section (typically a line of business).

10. Continue selecting and editing templates for each section of the proposal until all are selected.

11. Optional: Change the printing order of the templates.

    Highlight a list item, and then use the up and down arrows to the right of the **Current template selections** box to re-order the list.

12. Click **Next**.

    The **Action to Perform** dialog box appears.

13. Optional: Click **Print Preview** to see the proposal as it will print.

    Click **Close** to return to the **Action to Perform** dialog.

14. Select whether to **Print**, **Email**, and/or **Save as an Attachment** in the **Action to Perform** dialog box.

15. Click **Finish**.

16. The **Proposal Manager** dialog now displays the proposal, with the **Status** marked as **Completed**, the Modify and Print Dates, and a Print Count.
17. Click **OK**.
18. Click **Finish** to close the Action menu.

    The Add Log Entry Comments box opens.
19. Add comments as needed, and then click **OK**.

The new proposal is attached to the log note and is listed on the **Attachments** tab of the selected Client or policy tab.

Saving a proposal as a draft

Proposals can be saved as a draft at any point in the creation process and completed at a later time.

1. Click **Finish Later** on the **Proposal Template Selection** dialog box.

   The **Template Selection** dialog closes and the **Proposal Manager** dialog opens with the proposal status set to **Draft**.
2. Click **OK**.
3. Click **Finish** to close the Action menu.

   The Add Log Entry Comments box opens.
4. Add comments as needed, and then click **OK**.

Accessing a previously saved proposal

1. Retrieve a client file, and select the **Client** tab or a policy within the file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create** >**Proposals**.

   The **Proposal Manager - Proposals** dialog opens.
4. Select the existing proposal, and then click **Edit**.

The **Proposal Template Selection** dialog opens.

5. Complete the proposal by continuing with step 5 of Proposals, above.

Related Topics

Form Letter Templates
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Proposal Templates

Client, Policy, and Claims Summaries

Summaries provide a snapshot of client and policy information that can be printed and given to customers or other interested parties.

HawkSoft CMS provides four types of summaries that can be used to compile and print different information: Policy Overviews, Detailed Summaries, Dec Views, and Claims Details.

> Only an insurance carrier can provide proof of coverage. For this reason, documents generated in HawkSoft CMS should be used for reference only and not as legal proof of coverage or limits.

In this topic:

Creating and Printing the Policy Overview	Creating and Printing the Detailed Summary
Creating and Printing the Dec View	Creating and Printing the Claim Details

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Client File > Action Menu
>
> See Setting User Permissions for more information.

Creating and printing the Policy Overview

The Policy Overview is an editable document that provides basic agency, carrier, and coverage information for the selected policy.

This document uses the Policy Overview base template . This template can be configured to suit agency preferences, such as adding an agency logo and choosing the colors of the report dividers.

Please see Base Templates for more information.

1. Retrieve a client file, and then select a policy within that file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create**, and then **Summary**.
4. Select **Policy Overview**.

   The Policy Overview opens in the CMS Letter Editor.
5. Modify the Policy Overview as needed.

   See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) to learn about available editing options.
6. Optional: Save a working copy to the Attachments List that can be opened and modified in the future.

   Click **File**, and then check **Save Working Copy On Close**.

   > Once a user selects **Save a Working Copy On Close**, that feature is enabled for all future letters and memos. Uncheck this option to turn this setting off for future letters.
7. Use the File menu to print and/or attach the Policy Overview.

   Print and Close – Select to print the Policy Overview. A PDF is attached to the log note and client file.

   The Print dialog opens. Modify settings as needed, and then click **Print**.

   Attach and Close – Select to attach a PDF to the log note and client file without printing.
8. Click **Finish** to close the Action menu.

   The Add Log Entry Comments dialog box opens.
9. Add comments as needed, and then click **OK**.

The Policy Overview is attached to the client file as a PDF and can be accessed from within the log note or from the Attachments tab. If Save Working Copy on Close was selected, a second copy that can be edited, is also attached.

Creating and printing a Detailed Summary

A Detailed Summary enables you to choose from a list of client and/or policy sections to include. The list will vary depending on the policy type.

1. Retrieve a client file, and then select a policy within that file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print**, and then **Summary**.
4. Select **Detailed Summary**.

   The **Detailed Summary Options** dialog opens with policy related summary options selected by default.

Detailed Summary options

This section lists the different Detailed Summary options available for all policies, in addition to the options available to certain policy types.

All policies

Section	Details
Full Client Information	Lists the insured's name, address, and contact information such as phone numbers and email addresses
General Policy Information	Lists the general policy information (such as company, policy number, policy status, and policy dates) of all policies on the client file
Attachments	Lists the names and dates attached of all attachments on the client (if the Client tab is selected),

Section	Details
	or the policy (if a policy tab is selected)
Policy Claims	Lists all claims for the selected policy
Client Claims	Lists all claims on the client file

Client tab

Section	Details
All Active Policies	Lists all policies (plus general policy inform-ation) with an active or active pending status
Inactive Policies	List all policies (plus general policy information) with a non-active status (including prospect policies)

Auto policies

Section	Details
Coverages	Lists coverages for each vehicle on the policy
Vehicles Summary	Creates a summarized list of all vehicles on the policy (only includes vehicle number, year, make, model, VIN, and Fleet ID)
Vehicles Detail	Creates a list of all vehicles on the policy, with full details for each vehicle
Drivers Summary	Creates a summarized list of all drivers on the policy (only includes driver number, name, date of birth, last 4 digits of license number, last 4 digits of social security number, licensed state, and hire date)

Section	Details
	For security purposes, all license numbers and social security numbers only show the last four digits on printed summaries. To create a spreadsheet of all drivers with full license numbers and social security numbers shown, see To create a blank template or export a list of drivers or vehicles.
Drivers Detail	Creates a list of all drivers on the policy, with full details for each driver
Fees	Lists all fees on the policy, including policy fee, broker fee, SR22 fee, and other fees.
Discounts	Lists all applicable discounts on the policy, including multi-car, transfer, renewal, homeowner, paid-in-full, and other discounts.

Boat policies

Section	Details
Coverages	Lists all coverages for all boats on the policy
Boats Summary	Creates a summarized list of all boats on the policy (only includes boat name, year, make, model, hull ID, and vessel type)
Boats Detail	Creates a list of all boats on the policy, with full details for each boat
Operators Summary	Creates a summarized list of all boat operators on the policy (only includes operator number,

Section	Details
	name, date of birth, license number, and licensed state)
Operators Detail	Creates a list of all boat operators on the policy, with full details for each operator

Commercial/other policies

Section	Details
Locations Summary	Lists all locations and buildings on the policy (without building underwriting details)
Locations Detail	Lists all locations and buildings on the policy, including building underwriting details
Coverages	Lists all coverages for each line of business on the policy
General Liability Hazards	Lists all general liability hazards (if a Commercial General Liability line of business is on the policy)
Work Comp Hazards	Lists all Workers' Compensation hazards (if a Workers' Comp. line of business is on the policy)
Scheduled Property	Lists all scheduled property for each line of business and location on the policy
Unscheduled Property	Lists all unscheduled property for each line of business and location on the policy
Additional Interests	Lists all additional interests associated with the policy

5. Check or uncheck the sections you want to include on the Summary, and then click **OK**.

The default **Print** dialog opens.

6. Select a printer, and then click **Print**.

> To attach a copy of the Detailed Summary to the client file, select the HawkSoft Virtual Printer.
>
> When you click **Print**, CMS will close the Print dialog and open the Virtual Printer Viewer. Follow on screen prompts in the Virtual Printer Viewer, and then click Attach.
>
> See Working with Attachments to perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

7. Click **Finish** in the Action menu dialog.

   The Add Log Entry Comments dialog opens.

8. Add comments as needed, and then click **OK**.

The Detail Summary is printed and the log note is saved.

If you attached the Detail Summary to the client/policy, see Working with Attachments to perform actions from the Attachments List, such as emailing or sending the PDF for an electronic signature.

Creating and printing the Dec View

The Dec View is a document that provides complete policy information in a format similar to a declarations page from a carrier.

1. Retrieve a client file, and then select a policy within that file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create**, and then **Summary**.
4. Select **Dec View**.

   The **CMS Viewer** displays the Dec View.

5. Click **File** > **Print**.

   The default **Print** dialog opens.

6. Select a printer.

> To attach a copy of a Dec View to the client file, select the HawkSoft Virtual Printer.
>
> When you click **OK**, CMS will close the Print dialog and open the Virtual Printer Viewer. Follow on screen prompts in the Virtual Printer Viewer, and then click Attach.
>
> See Working with Attachments to perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

7. Click **OK**.
8. Close the Dec View document.

   The **Action** menu appears.
9. Click **Finish** in the Action menu dialog.

   The Add Log Entry Comments dialog box opens.
10. Add comments as needed, and then click **OK**.

The Dec View is printed, and the log note is saved.

If you attached the Dec View to the client/policy, see Working with Attachments to perform actions from the Attachments List, such as emailing or sending the PDF for an electronic signature.

Creating and printing the Claim Details

1. Retrieve a client file, and then select a policy within that file.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create**, and then **Summary**.
4. Select **Claim Detail**.

   The **Select Claim** dialog displays all claims on the selected policy. If the Client tab was selected in step 1, all claims for all policies are listed.
5. Select a claim from the list, and then click **View**.

The CMS Viewer opens with a summary of the selected claim.

6. Click **File** > **Print**.

   The default **Print** dialog opens.

7. Select a printer.

   > To attach a copy of the Claim Details to the client file, select the HawkSoft Virtual Printer.
   >
   > When you click **OK**, CMS will close the Print dialog and open the Virtual Printer Viewer. Follow on screen prompts in the Virtual Printer Viewer, and then click Attach.
   >
   > See Working with Attachments to perform actions from the Attachments List, such as emailing the letter or sending the letter for an electronic signature.

8. Click **OK**.

9. Close the Claim Details.

   The **Action** menu appears.

10. Click **Finish** in the Action menu dialog.

    The Add Log Entry Comments dialog opens.

11. Add comments as needed, and then click **OK**.

Related Topics

Form Letters

Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)

HawkSoft CMS enables you to make formatting changes and insert merge fields, signatures, and other elements into your letters, memos, proposals, and the Policy Overview.

See Communications Overview and Correspondence Setup Overview for more information about the different types of correspondence in CMS, and how to create and use templates.

- **Email** – To modify email using the CMS Email Message window, see Modifying Email.
- **Text Messaging** – To format a text message, see Text Message Templates.

This article describes the various formatting options available when modifying correspondence created directly from a client file within CMS. To modify correspondence templates, see Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview).

In this topic:

Adding Merge Fields	Adding Objects to Correspondence
Adding Images/Logos/Pictures to Correspondence	Adding Page Breaks and Lines

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

How do I get here?

A CMS Letter Editor is available when creating correspondence. The following steps assume you have the editing window open.

Adding merge fields

Merge fields are used to insert information from client or policy files into correspondence at the time it is generated. For example, you can insert a merge field to include a policy number or carrier name in correspondence.

Some field selections activate the **Merge Field Properties** dialog. Follow on-screen prompts to insert the field.

1. With the Letter Editor open, position your cursor where the merge field information should appear, and then click **Insert** > **Field** from the editing menu bar.

   The **Select Merge Field to Insert** dialog opens.

2. Select a field from the list.

   Use the **Filter Fields** and **Filter Category** to quickly find a field name.

3. Optional: If available, select a capitalization format for the field from the **Formatting** drop-down list.

   - **Proper Case** – The first letter of each word is capitalized.
   - **Upper Case** – All letters are capitalized.
   - **Lower Case** – All letters are lower case.

4. Click **Insert**.

   The merge field is inserted and the dialog stays open to add more fields if necessary.

5. Reposition your cursor to insert another merge field, as needed.

6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all fields have been inserted.

Adding a signature

CMS enables you to insert a signature into form letters, proposal, and memos.

See User Signature Setup to scan and set up your signature in CMS. Once your signature is set up, use the steps to Add a merge field.

Insert > **Field** > **Agent Signature**

The following fields are available for the signature:

Agent Signature (Agent 1)

Agent2 Signature

Agent3 Signature

- The user creating the correspondence must be authorized to use the signature intended for this item in order for the signature to display.
- When inserting the signature of another user on a letter or proposal, the agent's initials must appear on the GPI screen in the Agent 1, Agent 2, or Agent 3 field.

Formatting merge fields

Edit the font, font size, or color

1. Highlight the entire field, including chevrons: <<text>>.
2. Modify the field, as needed.

   Use the Format menu or toolbar icons to apply formatting and edit the font, font size, or color.
3. Click **Save & Close** when all changes are made.

Delete a merge field

1. Highlight the entire field, including chevrons: <<text>>.
2. Press **Delete** on your keyboard.
3. Click **Save & Close** when all changes are made.

Adding objects to correspondence

Objects are files such as graphs or tables that can be added to CMS correspondence. Objects can be added to correspondence templates as well as correspondence created from a client/policy.

Creating a new object

You can insert a new object, for example a blank Excel spreadsheet, and then insert your data directly into the object.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Object**.

   The **Insert Object** dialog box opens.

2. Select the appropriate **Object Type** (file), and then click **OK**.

   The CMS Letter Editor refreshes to display the selected object, with available editing tools from the corresponding program.

3. Modify the object as needed.

Adding an object from an existing file

You can insert a previously saved document, for example an Excel spread-sheet that contains data.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Object**.

   The **Insert Object** dialog opens.

2. Select **Create from File**.
3. Click **Browse**.

   The **Browse** dialog opens.

4. Select the file, and then click **Open**.

   The path to the object is displayed in the **Insert Object** dialog.

5. Select **Link** or **Display As Icon**:

Link – Inserts a picture of the file contents into your document. The picture will be linked to the file so that changes to the file will be reflected in your document.

Display As Icon – Inserts a picture of the file contents.

6. Click **OK** to insert the object into the template.

Adding images/logos/pictures to correspondence

Adding an image/logo from your computer

Images saved on your computer or network as JPG, BMP, TIF, or GIF can be added to letters, memos, and proposals.

1. With the CMS Letter Editor open, position your cursor, and then click **Insert** > **Picture**.

   The Windows® **Open** dialog opens.

2. Browse to locate the image, and then click **Open**.

Adding an image/logo when creating correspondence from a client file

When printing correspondence from a client/policy, you can insert images that have been attached to a client/policy into the correspondence. The images must be saved as JPG, BMP, TIF, or GIF.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Client Image Attachments**.

   The **Select Attachments** dialog box opens. Images attached to the selected client/policy are displayed.

2. Select the image(s) to insert, and then click **OK**.

   The image is inserted into the document.

Adding page breaks and lines

Page breaks and lines can be added to correspondence templates as well as correspondence created from a client/policy.

- **Page Break** – Provides a way to manually insert a page break at any point so you can determine the flow of the document.
- **Line** – Can be used to visually separate one section of text, objects, or pictures from another section to make the document more readable.

Adding a page break

Position your cursor, and then click **Insert** > **Page Break**.

The break will be visible in the Print Preview.

Adding a line

1. Position your cursor, and then click **Insert** > **Horizontal Line**.

   The **Horizontal Line** dialog appears.
2. Select line height and color.

   The preview changes as you modify the line.
3. Click **OK**.

Related Topics

Communications Overview
Correspondence Setup Overview

Merge Field Descriptions

The HawkSoft CMS Letter Editor enables you to create form letters and other types of correspondence. You can add CMS merge fields that pull information from client and policy files into CMS templates and letters.

This article describes each CMS merge field used in the letter editor. Each merge field represents the information that appears in the finished letter.

See Base Templates for details on inserting merge fields.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Correspondence Templates
>
> See Setting User Permissions for more information.

Merge Field Descriptions

The available merge fields are listed below the following categories in the **Filter Category** drop-down.

Agency

These merge fields pull data from the Agency Information dialog.

See for more information.

Agency fields

<<Agncy_Address>>	Agency Street Address or PO Box
<<Agncy_City>>	Agency City
<<Agncy_Email>>	Agency Email Address
<<Agncy_Fax>>	Agency Fax Number
<<Agncy_LicNum>>	Agency License Number
<<Agncy_Name>>	Agency Name
<<Agncy_Phone>>	Agency Phone Number
<<Agncy_State>>	Agency State
<<Agncy_Zip>>	Agency Zip Code

Client

These merge fields pull data from the Client Name and Address screen.

See Client Name and Address Information for more information.

> The Client CSR Signature and Client Producer Signature fields are available only when creating form letters.

Client fields

<<Cli_Address>>	Client Street Address or PO Box
<<Cli_Address2>>	Additional space for Client's street address or PO Box
<<Agency_ID>>	Client Agency ID (this field must be enabled in General Settings)
<<Cli_Email>>	Client Email
<<Cli_HomeEmails>>	Client Home Email(s) (multiple Home email addresses)
<<Cli_OtherEmails>>	Client Other Email(s) (multiple Other email addresses)
<<Cli_WorkEmails>>	Client Work Email(s) (multiple Work email addresses)
<<Cli_BusDBAName>>	Business DBA Name
<<Cli_BusName>>	Business Name
<<Cli_CellPh>>	Client Cell Phone Number
<<Cli_City>>	Client City
<<CSR>>	CSR 3 character user ID
<<CSRFull>>	CSR Full Name
<<CSRCellPhone>>	CSR Cell Phone Number
<<CSREmail>>	CSR Email Address
<<CSRFirstName>>	CSR First Name
<<CSRHomePhone>>	CSR Home Phone
<<Cli_CSRSignature>>	Client CSR Signature
<<CSRWorkPhone>>	CSR Work Phone
<<Cust_ID>>	HawkSoft assigned Customer ID

<<Cli_Fax>>	Client Fax Phone Number
<<Cli_FeinNum>>	Client Federal Tax ID Number
<<Cli_First>>	1st Named Insured First Name
<<Cli_First2>>	2nd Named Insured First Name
<<Cli_Phone>>	Client Home Phone Number Phone
<<Cli_Last>>	1st Named Insured Last Name
<<Cli_Last2>>	2nd Named Insured Last Name
<<Cli_LicenseNum>>	Client's business license number
<<Cli_MsgPh>>	Client Message Phone Number
<<Cli_Middle>>	1st Named Insured Middle Name
<<Cli_Middle2>>	2nd Named Insured Middle Name
<<Cli_NAICSCd>>	Client NAICS Code Number (North American Industry Classification System)
<<Cli_NAICS>>	Client NAICS Description
<<Cli_NamedInsureds>>	Business or First & Last Name of 1st & 2nd Named Insured
<<Cli_NamedInsuredsAll>>	Business or First & last names of all named insureds (if all last names are the same, the last name will print with the last named insured)
<<Cli_Name1>>	1st Named Insured
<<Cli_Name2>>	2nd Named Insured
<<Cli_NamedInsuredsContacts>>	First & Last Name of 1st & 2nd Named Insured
<<Cli_NamedInsuredsContactsAll>>	First & last names of all named insureds (if all last names are the same, the last name will print with the last named insured)
<<Cli_FirstNames>>	First Name of 1st & 2nd Named Insured

<<Cli_NamedIn-suredsAllFirstNames>>	First names of all named insureds
<<Cli_FirstNamesPreferred>>	Preferred names of the 1st & 2nd Named Insured
<<Cli_NamedIn-suredsAllPreferred>>	Preferred names of all named insureds (if a named insured does not have a preferred name, that named insured's first name will print)
<<Cli_OtherPh>>	Client Other Phone Number
<<Cli_Pager>>	Client Pager Phone Number
<<Cli_Preferred1>>	Preferred name of the 1st Named Insured
<<Cli_Preferred2>>	Preferred name of the 2nd Named Insured
<<Cli_PrimaryEmail>>	Client's Primary email address
<<Cli_ProducerSignature>>	Client Producer signature
<<Cli_HomeEmail>>	Client Home Email (1st Home email address listed)
<<Cli_OtherEmail>>	Client Other Email (1st Other Email Address listed)
<<Cli_PrimPh>>	Client Primary Phone Number (1st Phone Number listed)
<<Cli_WorkEmail>>	Client Work Email (1st Work Email Address listed)
<<Producer>>	Producer 3 character user ID
<<ProducerFull>>	Producer Full Name
<<ProducerCellPhone>>	Producer Cell Phone Number
<<Producer Email>>	Producer Email Address
<<ProducerFirstName>>	Producer First Name
<<ProducerHomePhone>>	Producer Home Phone Number

<<ProducerWorkPhone>>	Producer Work Phone Number
<<Cli_State>>	Client State
<<Cli_Title>>	Title for first Named Insured
<<Cli_Title2>>	Title for Second Named Insured
<<Website>>	Client Website
<<Cli_WorkPh>>	Client Work Phone Number
<<Cli_Zip>>	Client Zip Code

<<CLI_MiscL##>> appear in the Client Filter Category as a merge code if you have set up Client Miscellaneous Information. These merge fields pull from the **Client Misc Info** dialog. See Client Miscellaneous Information for details.

Company

These merge fields pull data from Policy Company Setup.

See Policy-Company Setup Screens Overview for more information.

Company fields

<<Comp_Address>>	Company Address
<<Comp_City>>	Company City
<<Comp_ClaimPhone>>	Company Claims Phone Number
<<Comp_Name>>	Company Name - HawkSoft will use Formal Name OR Program Name if **Use Program as Formal Name** is checked
<<Comp_CustPhone>>	Company Customer Service Phone Number
<<Comp_Email>>	Company Email Address
<<Comp_Fax>>	Company Fax Number
<<Comp_Note>>	Company Notes
<<Comp_State>>	Company State

<<Comp_UnderPhone>>	Company Underwriting Phone Number
<<Comp_WebSite>>	Company Website
<<Comp_Zip>>	Company Zip Code

Lists

These merge fields pull data from various lists throughout CMS. These list merge fields are also available below their relevant category. For example, <Driver List> is also found in the Policy category.

Personal Profile

These merge fields pull data from the **Add/Edit Personal Profile** dialog, accessed from the Client Name and Address screen.

When you insert a merge field from this category, you will be prompted to select which profile you want to pull data from, if more than one Personal Profile exists on the selected client.

See Client Name and Address Information for more information.

Personal Profile fields

<<PP_Anniversary>>	Personal Profile Anniversary
<<PP_DoB>>	Personal Profile Date of Birth
<<PP_Education>>	Personal Profile Level of Education
<<PP_Email>>	Personal Profile First Email Address
<<PP_Employer>>	Personal Profile Employer
<<PP_First>>	Personal Profile First Name
<<PP_Gender>>	Personal Profile Gender
<<PP_Hobbies>>	Personal Profile Hobbies
<<PP_Income>>	Personal Profile Income
<<PP_Last>>	Personal Profile Last Name
<<PP_License>>	Personal Profile Driver License Num-

	ber
<<PP_LicenseState>>	Personal Profile Driver License State
<<PP_MaritalStatus>>	Personal Profile Marital Status
<<PP_Name>>	Personal Profile First and Last Name
<<PP_Occupation>>	Personal Profile Occupation
<<PP_Phone>>	Personal Profile First Phone Number
<<PP_Relationship>>	Personal Profile Relationship to Insured
<<PP_Residence>>	Personal Profile Residence

Policy

These merge fields pull data from the General Policy Information screen.

See General Policy Information for more information.

Policy fields

<<Pol_AccountNum>>	Policy Account Number
<<AI List>>	Additional Interest List
<<Pol_Address>>	Policy Garaging Address
<<Pol_Agent>>	Policy Agent 1 - Three-character User ID
<<Pol_AgentFull>>	Policy Agent 1 - Full Name
<<Pol_AgentCellPhone>>	Policy Agent 1 - Cell Phone Number
<<Pol_AgentEmail>>	Policy Agent 1 - Email Address
<<Pol_AgentFirstName>>	Policy Agent 1 - Full Name
<<Pol_AgentHomePhone>>	Policy Agent 1 - Home Phone Number
<<Pol_AgentSignature>>	Policy Agent 1 - Signature
<<Pol_AgentWorkPhone>>	Policy Agent 1 - Work Phone Number

<<Pol_Agent2>>	Policy Agent 2 - Three-character User ID
<<Pol_Agent2Full>>	Policy Agent 2 - Full Name
<<Pol_Agent2CellPhone>>	Policy Agent 2 - Cell Phone Number
<<Pol_Agent2Email>>	Policy Agent 2 - Email Address
<<Pol_Agent2FirstName>>	Policy Agent 2 - First Name
<<Pol_Agent2HomePhone>>	Policy Agent 2 - Home Phone Number
<<Pol_Agent2Signature>>	Policy Agent 2 - Signature
<<Pol_Agent2WorkPhone>>	Policy Agent 2 - Work Phone Number
<<Pol_Agent3>>	Policy Agent 3 - Three-character User ID
<<Pol_Agent3Full>>	Policy Agent 3 - Full Name
<<Pol_Agent3CellPhone>>	Policy Agent 3 - Cell Phone Number
<<Pol_Agent3Email>>	Policy Agent 3 - Email Address
<<Pol_Agent3FirstName>>	Policy Agent 3 - First Name
<<Pol_Agent3HomePhone>>	Policy Agent 3 - Home Phone Number
<<Pol_Agent3Signature>>	Policy Agent 3 - Signature
<<Pol_Agent3WorkPhone>>	Policy Agent 3 - Work Phone Number
<<Pol_AgentCode>>	Company Agent Code
<<Pol_Application Type>>	Application Type field on General Policy Information screen
<<Pol_City>>	Policy Garaging City
<<Pol_Company>>	Company Name - HawkSoft will use Formal Name OR Program Name if **Use Program as Formal**

	Name is checked
<<Pol_CompanyUnique>>	Unique Company Name
<<Contact List>>	Contact List
<<Coverage Summary List>>	Policy Coverage Summary List
<<Policy_DaysLap>>	Days of Lapsed Coverage
<<Driver List>>	Policy Drivers list (personally identifiable information unmasked)
<<Driver List:secure>>	Policy Drivers list (Personally identifiable information masked)
<<Pol_EffectDate>>	Policy Effective Date
<<Pol_ExpireDate>>	Policy Expiration Date
<<Hazard Detail List>>	Policy Hazard List
<<Hazard Summary List>>	Policy Hazard Summary List
<<Pol_InceptDate>>	Policy Inception Date
<<Pol_LOBs>>	Lines of Business Codes
<<Pol_LOBDescriptions>>	Lines of Business Descriptions
<<Location List>>	List of Locations
<<Pol_NAICCode>>	Policy NAIC (National Association of Insurance Commissioners) code
<<Pol_Policy Form>>	Policy Form
<<Pol_PolNum>>	Policy Number
<<Policy Summary List>>	Policy Summary List
<<Pol_Title>>	Policy Title
<<Pol_State>>	Policy State
<<Pol_Premium>>	Policy Current Rate
<<Premium Detail List>>	Premium Detail List
<<Pol_Program>>	Program Name
<<Quoted Premium>>	Quoted Premium
<<Schedule Detail List>>	Schedule Detail List
<<Schedule Summary List>>	Schedule Summary List
<<Pol_Source>>	Policy Source

<<Pol_St>>	Policy Garaging State
<<Pol_Status>>	Policy Status
<<Pol_StatDate>>	Policy Status Date
<<Pol_Term>>	Policy Term Period (e.g. 6 months, 12 months)
<<Vehicle List>>	Policy Vehicle List
<<Pol_Zip>>	Policy Garaging Zip Code

Auto fields

<<Auto_Bi>>	Bodily Injury Limits
<<Auto_BillPlan>>	Billing Plan
<<Auto_BrFees>>	Broker Fees
<<Auto_Address>>	Garaging Street Address
<<Auto_State>>	Garaging State
<<Auto_Zip>>	Garaging Zip Code
<<Auto_Med>>	Medical Payments Limit
<<Auto_OtherFee>>	Other Fee
<<Auto_Pd>>	Property Damage
<<Auto_PipDed>>	PIP Deductible
<<Auto_Pip>>	PIP Limit
<<Auto_Sr22Fee>>	SR22 Fee
<<Auto_Uim>>	UIM Limit
<<Auto_Umbi>>	UMBI Limit

Mopro fields

<<Mopro_Lockout>>	MoPro Lockout Coverage
<<Mopro_Rental>>	MoPro Rental Coverage
<<Mopro_Tow>>	MoPro Towing Coverage
<<Mopro_Veh1>>	MoPro Vehicle 1
<<Mopro_Veh2>>	MoPro Vehicle 2

<<Mopro_Veh3>>	MoPro Vehicle 3
<<Mopro_Veh4>>	MoPro Vehicle 4

User

These merge fields pull data from the User Profile screens.

See User Setup Overview for more information.

User fields

<<User_Address>>	Address of User who is logged into CMS.
<<User_City>>	City of User who is logged into CMS
<<User_Email>>	Email Address of User who is logged into CMS
<<User First>>	First Name of User who is logged into CMS
<<User Initials>>	3 character User ID of User who is logged into CMS
<<Input>>	User Input
<<User Name>>	Full Name of User who is logged into CMS
<<User_Notes>>	Notes found in the User List of User who is logged into CMS
<<User_Phone1>>	1st Phone Number of User who is logged into CMS
<<User_Phone2>>	2nd Phone Number of User who is logged into CMS
<<User_Phone3>>	3rd Phone Number of User who is logged into CMS
<<User_PhoneTitle1>>	Title (e.g. home, work, etc.) of 1st Phone Number of User who is

	logged into CMS
<<User_PhoneTitle2>>	Title (e.g. home, work, etc.) of 2nd Phone Number of User who is logged into CMS
<<User_PhoneTitle3>>	Title (e.g. home, work, etc.) of 3rd Phone Number of User who is logged into CMS
<<User_Signature>>	User Signature
<<User_State>>	State of User who is logged into CMS
<<User_Zip>>	Zip Code of User who is logged into CMS

Related Articles

Communications Overview
General Settings
Microsoft Word Form Letters