

Creating Custom Letters – Basic

You can use the QUICKWORD utility to create and save generic letter templates. These templates are later used to print personalized letters to your clients.

Creating a letter: To begin, open QUICKWORD and click the *New* button on the menu bar to start working on a new document. To create a generic template that can be used for all your clients, you will insert *symbols* into your template. These *symbols* represent data fields from QuickFile, and they are enclosed in braces to distinguish them from regular text. When you print the letter, the symbols will be replaced with your client's data. To make the symbols easier to locate, they are grouped by category.

To insert a symbol, place your cursor where you want the data to appear, select the appropriate category, choose a *symbol* from the list, and double-click the *symbol*.



Notice that a description of the selected symbol appears at the bottom of the window.



You can also format the text in your letter. You can change the color of your text to red, blue or green, you can change the text style to bold or italic, and you can change the font size. You can also use the *Advanced Editor* to add custom colors, custom fonts, advanced formatting, and hyperlinks to your letter template.



The “*Creating Custom Letters – Advanced*” video explains how to use the *Advanced Editor* to apply additional formatting to your letter.

To save your template, click *Save* or *Save As*, enter a name for your letter, and click OK.

Printing your letter: Return to the CLIENTS drawer to print your letter. From the *Search* screen, select your client, click the *Print* button on the menu bar and choose “*Print A Letter*”. You can also print a letter from the *Clients* screen, the *Policies* screen or the *Letters* screen.

Select your letter from the list and click *OK*. Your letter will open in a preview window. To magnify the preview, click your left mouse button to zoom in.

You will notice that the *symbols* have been replaced with actual data from your client's record. In

addition to the QUICKWORD *symbols*, the client's name & address, the date, and your agency's information are added automatically, resulting in an attractive, personalized letter.

Clicking the preview a second time will zoom back out. Now, you can either send the letter to your printer, or close it. If you close the letter, you will have the choice of deleting it, or saving it to print later.

Mass mailings – Sending your letter to a group of clients: To send your letter to groups of clients matching criteria that you specify, you can send a mass mailing using the MAILROOM feature. For more information on how to send mass mailings, please view the '*Printing Letters in MAILROOM*' video.