QQCATALYST[™]

Quick Start Guide

Marketing - Bulk Email & Print Jobs

Table of Contents

Creating A Distribution List	.3
Creating A Bulk Email & Print Job	.6

Creating A Distribution List

Bulk email and bulk print jobs can be completed in Catalyst. Before doing the bulk job, we recommend creating the email or print template. Please refer to the **Marketing – The Template Library** guide.

After creating your template hover over Marketing and select the Bulk Email/Print option.

	CONTACTS	MARKETING 🗵 🛛	REPORTS MC	DRE 🗖	Dickinson Merrin 🔔 🛛
		TEMPLATES LIBR	RARY		Y
MY DASHBOARD		IMAGES LIBRARY	r		FILTERS ADD WIDGET
Total Active Premium ゆ ? ー ロ ×	Expiring Po	BULK EMAIL / PR	INT 🖉 🗸	Active Policies	ф?-@×
Active Policy Premiums	From 11/04/20	13 to 02/02/2014			Active Policies
\$2,500,000.00	Customer	Expiration	Line	250 -	
\$2,000,000.00 -	Joy Samuels	11/21/2013	Personal Auto	200 -	
	Juanita Consu	11/23/2013	Personal Auto		
\$1,500,000.00	Jane Johnson	11/26/2013	Personal Auto	S 150 - ICICICIC	
\$1,000,000.00	Arielle Juan Sa	a 11/28/2013	Personal Auto	100 -	

There is a Standard Library of lists built for you. You can click on the list to duplicate it, make changes, and save it to the Agency Library. You can also build your own lists. To create a new list click on Add New Lists in the toolbar.

ADD NEW LIST					
LIST, SELECT THE LIST AND CLICK "EI	DIT" IN THE DROP-DOWN MENU THAT AP	THE DIFFERENT DISTRIBUTION LISTS AVAIL PEARS. IF YOU NEED TO CREATE YOUR OW OF CREATING A CUSTOM DISTRIBUTION LIS	N CUSTOM DISTRIBUTIO		
ALL	NAME	DESCRIPTION	ТҮРЕ	CATEGORY	DATE MODIFIED
STANDARD LIBRARY FINANCIAL	CARRIER LIST		FINANCIAL	CARRIERS	01/30/2013
CARRIER	CUSTOMER LIST		CUSTOMER	CUSTOMERS	01/30/2013
CUSTOMER	EMPLOYEE LIST		FINANCIAL	EMPLOYEES	01/30/2013
AGENCY LIBRARY	MGA LIST		FINANCIAL	MGAS	01/30/2013
FINANCIAL CARRIER CUSTOMER OTHER	PROSPECT LIST		FINANCIAL	PROSPECTS	01/30/2013

CATEGORY

Customers

Carriers

MGAs

Employees

Prospects

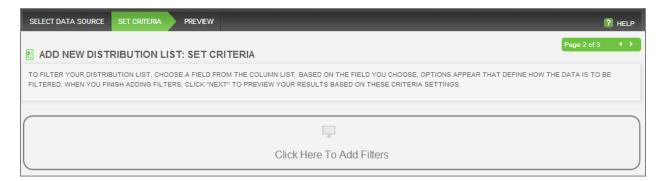
Finance Companies

The category should be who the bulk job is built to go to. The Data Sources options are what filters you would like to pull into the distribution list.

DAT	A SOURCES
Cus	stomer
	CUSTOMER INFORMATION CUSTOMER ACTIVITIES CUSTOMER TASKS
Poli	icy
	POLICY INFORMATION POLICY ACTIVITIES POLICY TASKS ENDORSEMENT INFORMATION COMMISSIONS
Fina	ancial
	PAYMENTS BILLS

In this case I have selected the Customer category. I have also selected the Customer Information and Policy Information data sources. The Customer Information data source gives you filters like Customer Birth Month, Customer Status, Marital Status, Gender and Customer Source. The Policy Information data source gives you merge fields like Writing Carrier, Policy Number, Policy Premium, Effective Date, and Expiration Date and Policy Status. Click Next to continue in the workflow.

On the next tab you will be able to add filters.



Filters allow you to narrow your distribution list for target marketing. You can add additional filters by clicking on **Add Another Filter**. There is no limit to the number of filters you can use.

SELECT DATA SOURCE SET CRITERIA PREV		P HELP
ADD NEW DISTRIBUTION LIST: SE	I CRITERIA	Page 2 of 3 🔹 🕨
	LD FROM THE COLUMN LIST. BASED ON THE FIELD YOU CHOOSE, OPTIONS APPEAR 1 "NEXT" TO PREVIEW YOUR RESULTS BASED ON THESE CRITERIA SETTINGS.	THAT DEFINE HOW THE DATA IS TO BE
This List Will Show Records WHERE Customer Status In List (Active) AND Policy Status In List (Active)		
AND Policy Business Type In List (New Bus AND Effective Date Is Between (10/01/2013		
COLUMN	VALUE	
Customer Status	In List Active × +Add More	C Remove
AND		
Policy Status 🔻	In List Active × +Add More	O Remove
AND		
Policy Business Type	In List New Business × +Add More	C Remove
AND		
Effective Date 💌	Is Between 10/01/2013 AND 10/31/2013	C Remove
O Add Another Filter		

When you click next you will be able to name your distribution list, add a description and select a type. Click save to exit the workflow.

ADD NEW DISTRIBUT	ION LIST: PREVIEW			Page 3 of 3	
	HE DISTRIBUTION LIST YOU CREAT BACK THROUGH THE WORKFLOW		INTER A NAME, DESCRIPTI	ON, AND TYPE. TO MODIFY CRITERIA FOR THIS LIS	
Customer Primary Email	Customer First Name	Customer Last Name	Business Name	NAME	
arodriguez@myemail.com	Anna	Rodriguez			
prettygirl@mymail.com	Bree	Manning		October NB Customers	
chernandez@mymail.com	Char	Hernandez		DESCRIPTION	
gwill@mymail.com	Grace	Williamson			
gfern@mymail.com	Guya	Fernandez		Active Customers with Active New Business Policies	
jwashington@mymail.com	Janet	Washington			
bmitchell@myemail.com	Jasmine	Mitchell			
joreily@mymail.com	Jasmine	O'Reily			
	Jennifer	Sanford		ТҮРЕ	
	John	James	ABC Distributic	Customer	
precious@myemail.com	Karla	Sands			
lwilson@mymail.com	Leah	Wilson			
sweetgirl@mymail.com	Marie	Avilla			

Creating A Bulk Email & Print Job

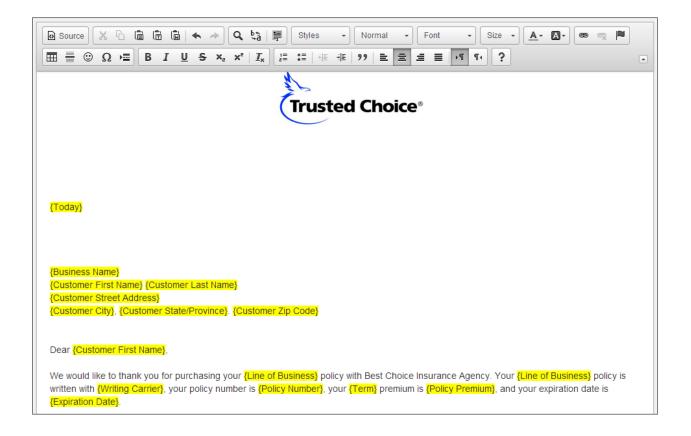
After you have created the template and the distribution list, you can create a bulk job. Click on the distribution list and select **Create Bulk Email/Print**.

	ST				
LIST, SELECT THE LIST AND	CLICK "EDIT" IN THE DROP-DOWN MENU THA	JGH THE DIFFERENT DISTRIBUTION LISTS AVA IT APPEARS. IF YOU NEED TO CREATE YOUR (ESS OF CREATING A CUSTOM DISTRIBUTION L	OWN CUSTOM DISTRIE		
				Search	
ALL	NAME	DESCRIPTION	ТҮРЕ	CATEGORY	DATE MODIFIED
STANDARD LIBRARY FINANCIAL	▼ OCTOBER NB CUSTOMERS	ACTIVE CUSTOMERS WITH ACTI	CUSTOMER	CUSTOMERS	11/04/2013
CARRIER		S CUSTOMERS WITH AUTO POLICI	CUSTOMER	CUSTOMERS	11/01/2013
CUSTOMER OTHER	Duplicate		FINANCIAL	CUSTOMERS	10/31/2013
AGENCY LIBRARY	Create Bulk Email / Print	NEW BUSINESS POLICIES	CUSTOMER	CUSTOMERS	10/31/2013
	Delete	NEW BUSINESS POLICIES	CUSTOMER	CUSTOMERS	10/31/2013
CUSTOMER	SEPT & OCT CANCELLATION	S CANCELLED POLICIES	CUSTOMER	CUSTOMERS	10/24/2013
OTHER	PROGRESSIVE EMAIL BLAST		FINANCIAL	CUSTOMERS	10/24/2013

Then you will be prompted to select a template from your Templates Library. Make your selection and click **Next** to continue in the workflow.

POLICY LIST TEMPLATE LIST						? HELP
CREATING A DOCUMENT FOR SIERA ALVAREZ						
BELOW IS A LIST OF AVAILABLE TEM TEMPLATE BELOW AND CLICK "NEX"			SSIONAL DOCUMENTS	AND EMAIL TO SE	ND TO YOUR CONTAC	TS. SELECT A
Office 1				Sea	ırch	
ALL	NAME	DESCRIPTION	ТҮРЕ	CREATED	DATE MODIFIED -	MODIFIED BY
STANDARD LIBRARY CANCELLATION	NEW BUSINESS THANK	NEW BUSINESS C	NEW BUSINESS	11/04/2013	11/04/2013	DICKINSON M
FINANCIAL	DICKINSON'S EMAIL TEM	BLANK	CANCELLATIO	10/31/2013	10/31/2013	DICKINSON M
INTENT TO CANCEL	GRATUITY LETTER	THANK YOU FOR Y	NEW BUSINESS	10/31/2013	10/31/2013	DICKINSON M
NEW BUSINESS PERSONAL	MARKETING CLASS 10/2	NEW BUSINESS C	NEW BUSINESS	10/24/2013	10/24/2013	DICKINSON M
REINSTATEMENT	ESTRELLA - THANK YOU	NEW BUSINESS T	NEW BUSINESS	10/03/2013	10/22/2013	PEDRO PEREZ
RENEWAL	BLANK LETTER WITH LE	BLANK LETTER	CANCELLATIO	10/10/2013	10/10/2013	DICKINSON M
AGENCY LIBRARY	THANK YOU LETTER 2	OPEN SIGNATURE	NEW BUSINESS	10/03/2013	10/10/2013	PEDRO PEREZ
CANCELLATION	THANK YOU LETTER	THANK YOU FOR Y	NEW BUSINESS	07/25/2013	09/27/2013	PEDRO PEREZ
FINANCIAL INTENT TO CANCEL	INQUIRY LETTER	THANK YOU FOR I	NEW BUSINESS	06/20/2013	09/27/2013	PEDRO PEREZ
NEW BUSINESS	CONTACT US IMMEDIAT	WITH AGENCY LOGO	NEW BUSINESS	06/06/2013	09/27/2013	PEDRO PEREZ
PERSONAL				08/07/0040	06/07/0040	DIOKINGON M

The template will be opened to make any changes for the bulk job. If there are no changes to be made, click **Next** to continue.



When you click next you will see the number of contacts that meet the distribution list criteria you built. You can cycle through the list by clicking on the green arrows.

Showing Preview 1 of 48 🔹 >
Trusted Choice®
11/04/2013
Anna Rodriguez 196 S. Riviera Street Palm Beach, FL. 34616
Dear Anna,
We would like to thank you for purchasing your Personal Auto policy with Best Choice Insurance Agency. Your Personal Auto policy is written with Travelers Insurance Company, your policy number is PA4613797, your Semi Annual premium is \$1,340.29, and your expiration date is 04/10/2014.
Feel free to contact your agent Dickinson Merrin at (800) 555-1212 if you have any questions.
Thanks, Deckenson Merrin

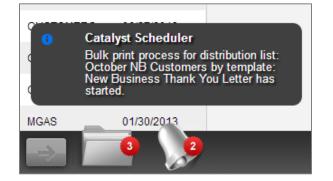
On the next tab you will be able to enter a title for the file and select your Delivery Option. To print the documents, select **Print This Document** and click **Finish**.

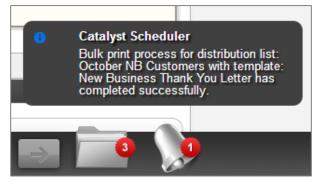
SELECT TEMPLATE DOCUMENT EDITOR PREVIEW DELIVERY OPTIONS	
CREATING BULK EMAIL / PRINT USING OCTOBER NB CUST	OMERS
	OW TO GIVE YOUR DOCUMENT A TITLE AND ADD A DESCRIPTION. IN ADDITION, YOU HAVE MENT" AND CLICK ON THE "NEXT" BUTTON TO CONTINUE TO THE NEXT STEP, OTHERWISE
Document Description	Delivery Options
TITLE	EMAIL THIS DOCUMENT
Thank You Letter sent to insured	PRINT THIS DOCUMENT
NOTES	
CANCEL X	

WARNING
You are about to generate a single PDF that contains 46 document(s). Once that PDF is complete, you can choose to save or print your document(s). Do you wish to continue?
NO 🗙 YES 🖊

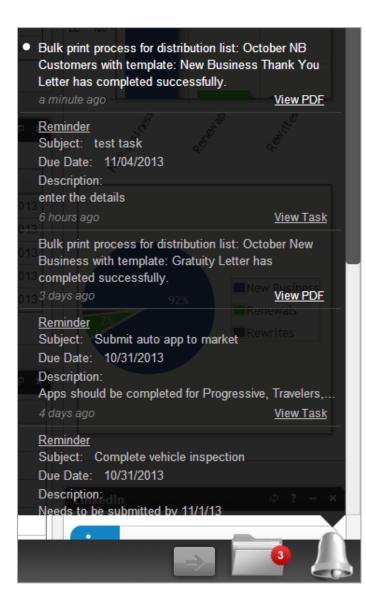
When you click **Finish**, the system will inform you of how many documents will be created and ask for confirmation to continue. When you click **Yes**, the job will be started.

You do not need to wait for the Bulk Print job to be completed. You can continue working in Catalyst. The system will inform you when the bulk job begins and when it is completed.





Click on the Notification Bell and then select the **View PDF** link to print your letters. A copy of the letter is automatically attached to the contact's file.

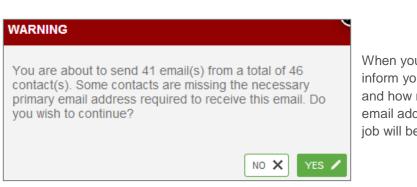


To email the documents, select Email This Document and click Finish.

SELECT TEMPLATE DOCUMENT EDITOR PREVIEW DELIVERY OPTIONS	
	NB CUSTOMERS
Document Description	Delivery Options
TITLE Thank You Letter sent to insured NOTES	EMAIL THIS DOCUMENT PRINT THIS DOCUMENT
CANCEL X	← PREV NEXT -

All validated email addresses assigned to you will be listed in the **From** field and your contact's primary email will be listed in the **To** field. If your email address does not populate in the **From** field, please refer to the **Setting Up Email in Catalyst** guide.

SELECT TEM	PLATE	DOCUMENT EDITOR	PREVIEW	DELIVERY OPTIONS	EMAIL HEADER		1 HELP
CREATING BULK EMAIL / PRINT USING OCTOBER NB CUSTOMERS							
IN THE EMAIL HEADER BELOW, YOU WILL NEED TO SELECT A FROM: ADDRESS FROM THE LIST OF AVAILABLE EMAIL ADDRESSES. NEXT, ENTER A SUBJECT LINE THAT WILL APPEAR ON YOUR EMAILS. ONCE YOU HAVE FINISHED COMPLETING THESE FIELDS, CLICK THE "FINISH" BUTTON TO BEGIN SENDING EMAILS TO ALL CONTACTS IN YOUR DISTRIBUTION LIST.							
FROM	dmerri	n@qqsolutions.c	om				
SUBJECT	Thank	You For Your Bu	siness				
CANCEL X]					← PREV	FINISH →



When you click **Finish**, the system will inform you of how many emails will be sent and how many contacts are missing primary email addresses. When you click **Yes**, the job will be started. You do not need to wait for the Bulk Print job to be completed. You can continue working in Catalyst. The system will inform you when the bulk job begins and when it is completed.



A copy of the email is automatically attached to the contact's Files tab and the Log tab.