QQCATALYST™

Quick Start Guide

Marketing – The Template Library

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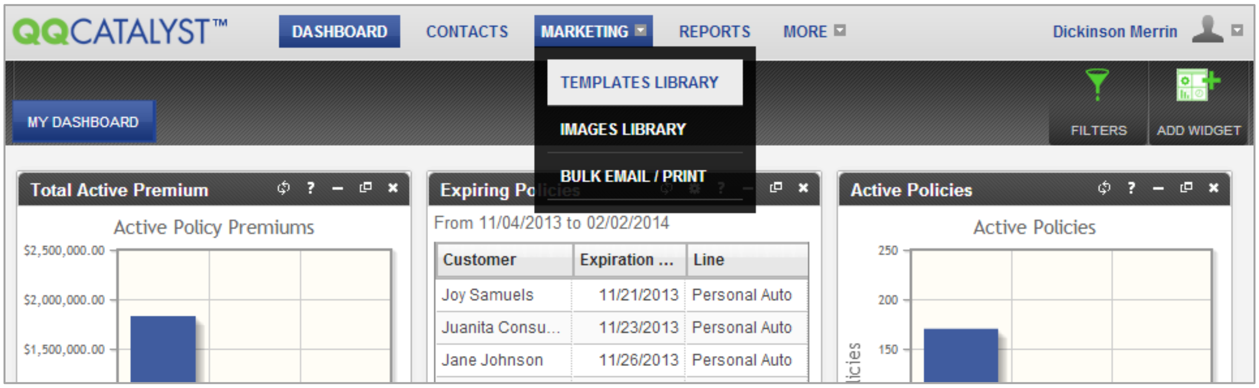
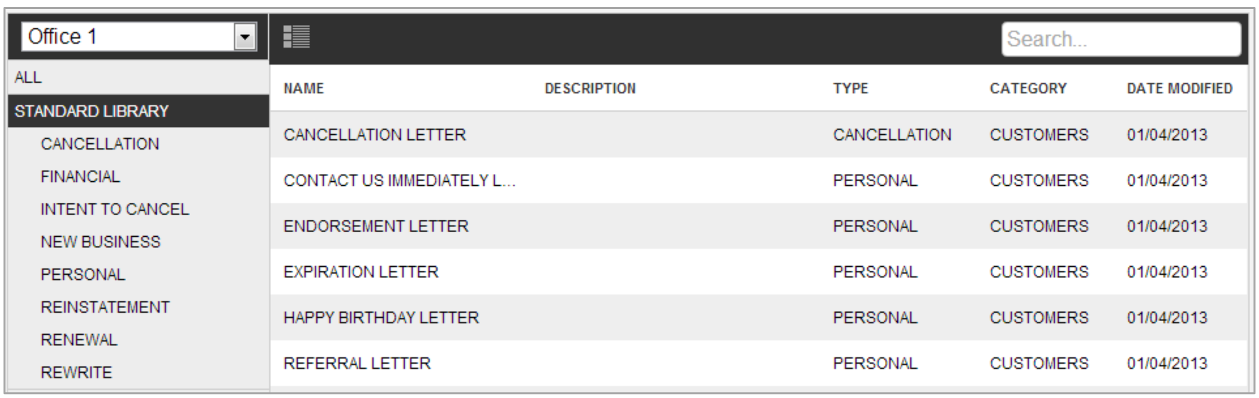
The Standard Library

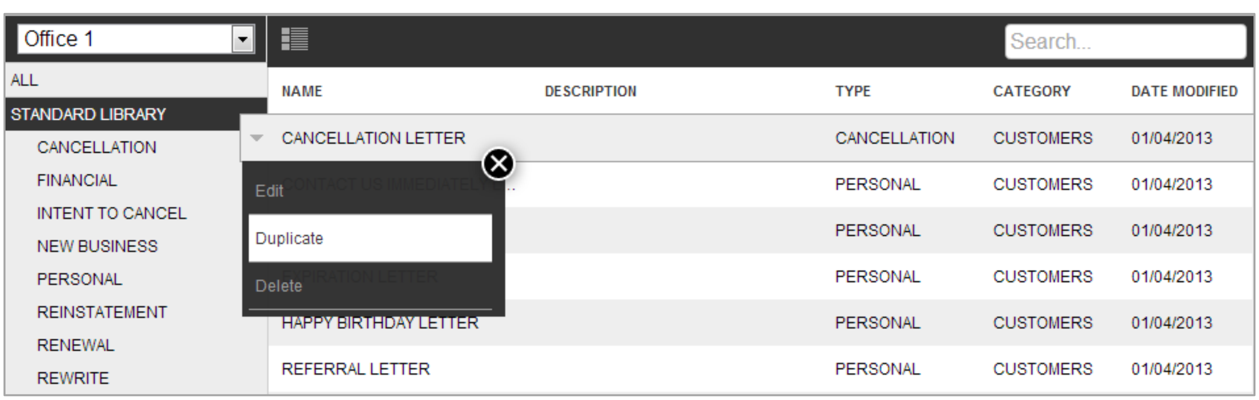
To access the Standard Library, hover over **Marketing** and select **Templates Library**.



Click on **Standard Library** to view the list of templates that have been built for you. You can narrow your search by clicking on the category listed under **Standard Library**. You can also type the name of your template in the **Search** field to filter the list.

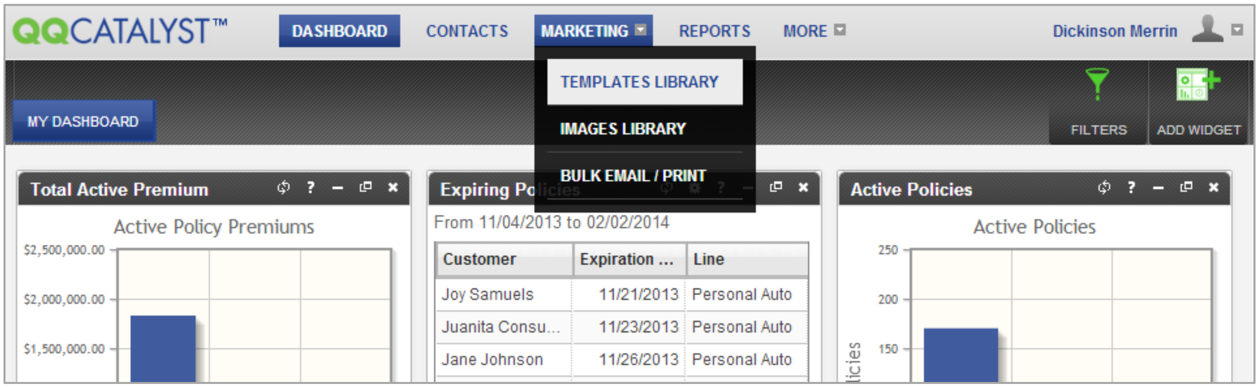


You can click on the template to duplicate it, make changes, and save it to the Agency Library. Templates are not issued in the Marketing Section. You will need to be on a contact or in the Bulk Email/Print section.

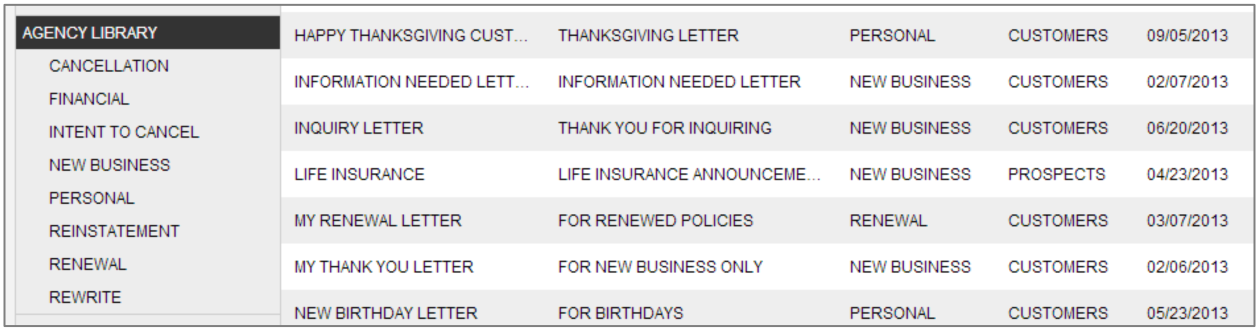


The Agency Library

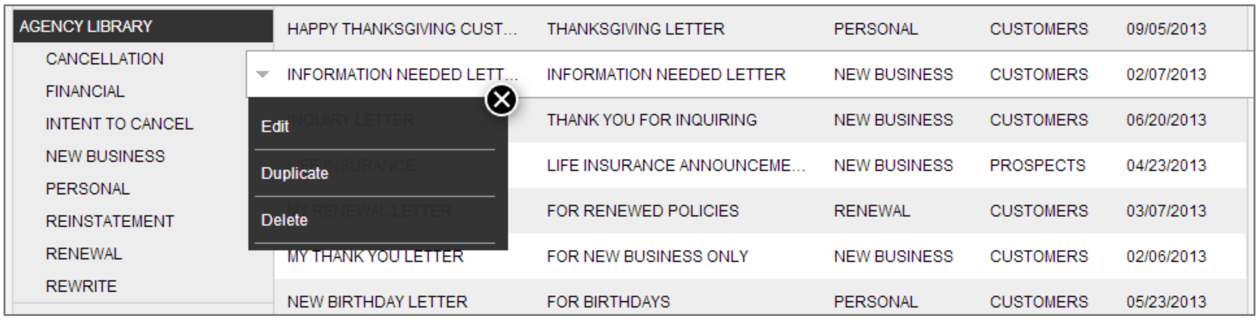
To access the Agency Library, hover over **Marketing** and select **Templates Library**.



Click on **Agency Library** to view the list of templates that you have built or duplicated from the Standard Library. You can narrow your search by clicking on the category listed under **Agency Library**. You can also type the name of your template in the **Search** field to filter the list.

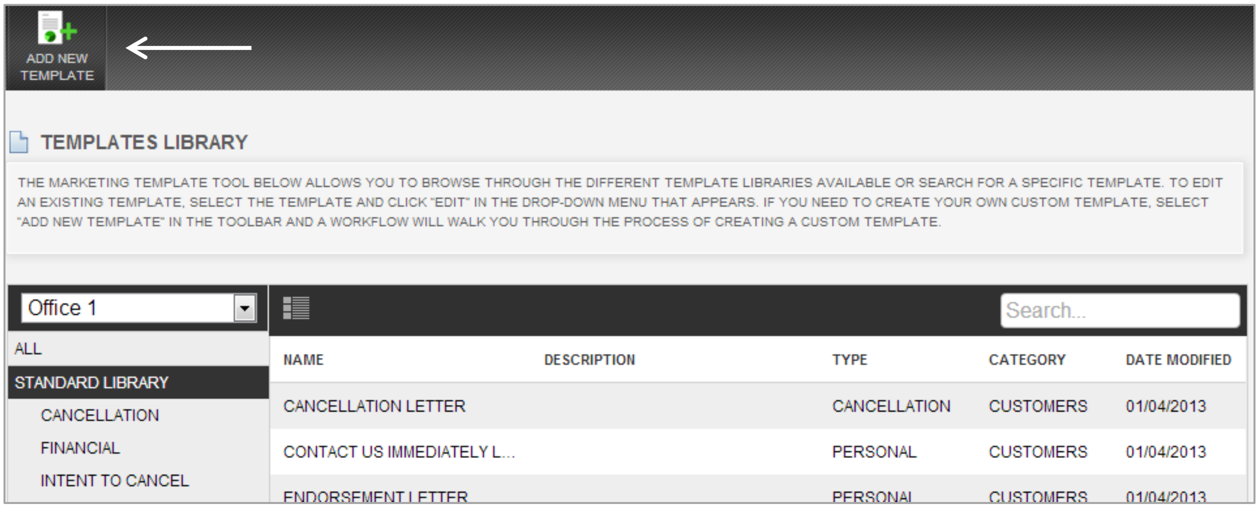


You can click on the template to duplicate it, edit, or delete it. Templates are not issued in the Marketing Section. You will need to be on a contact or in the Bulk Email/Print section to print or email a template.

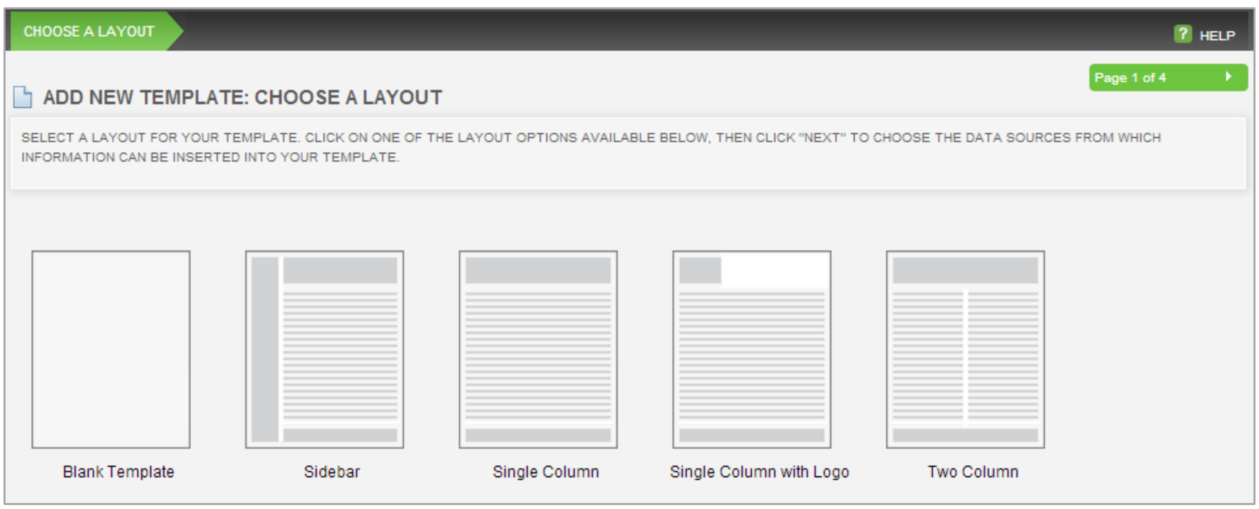


Add A New Template

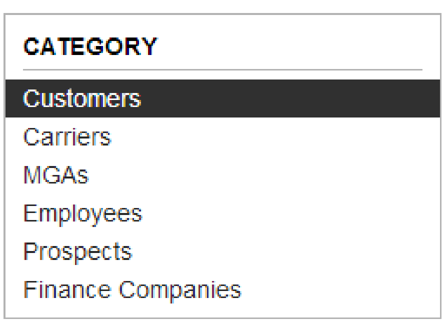
You can add a new template by clicking on the **Add New Template** icon in the toolbar.



Choose the layout of your preference and then click next to continue.

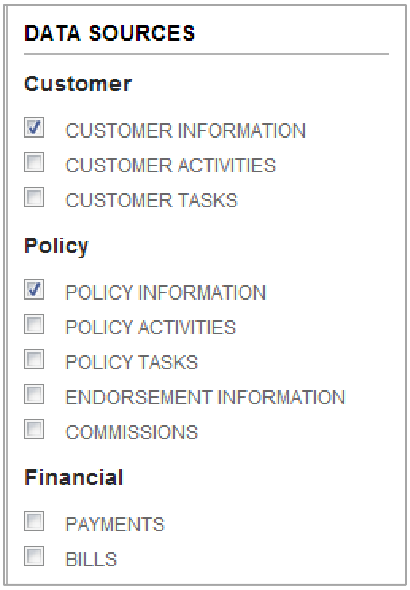


You will be able to pull in Merge Fields by selecting a category and Data Sources. The category should be who the template is built to go to. The Data Sources options are what information you would like to pull into the template.

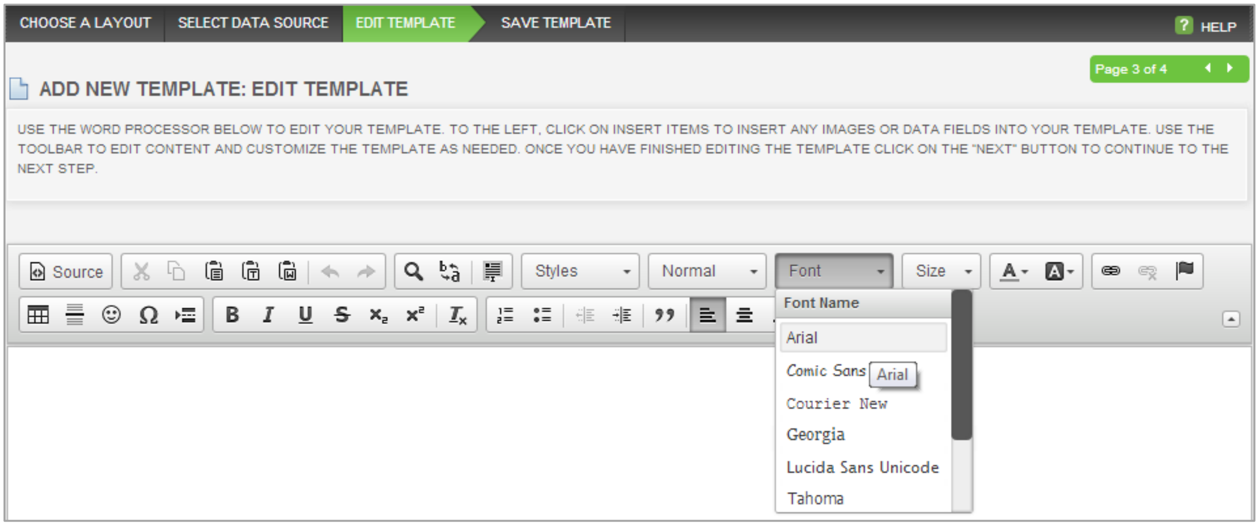


In this case I have selected the Customer category. I have also selected the Customer Information and Policy Information data sources. The Customer Information data source gives you merge fields like First Name, Last Name, Business Name, Address, Date of Birth and Phone Number. The Policy Information data source gives you merge fields like Writing Carrier, Policy Number, Policy Premium, Effective Date, and Expiration Date.

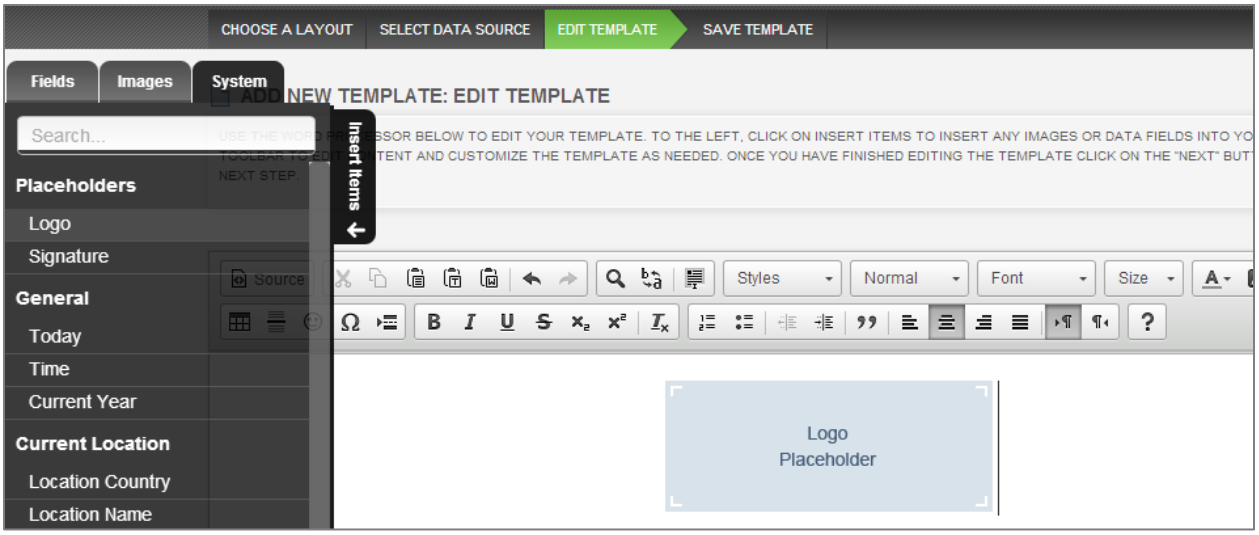
If you forget a Data Source option, you can always move back in the workflow to make an additional selection.



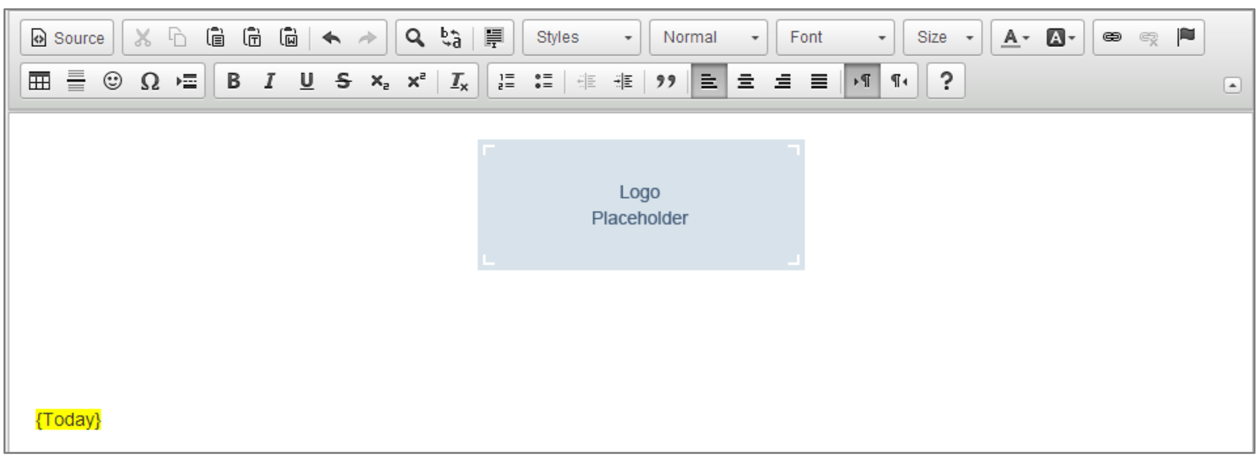
Begin by selecting a font and font size. If a font is not selected, the system will use a default font and size. The system's default font is much smaller than it appears in the Edit Template window. If you have already typed the contents of your template, left click and drag to highlight all the text. Then select a font and size.



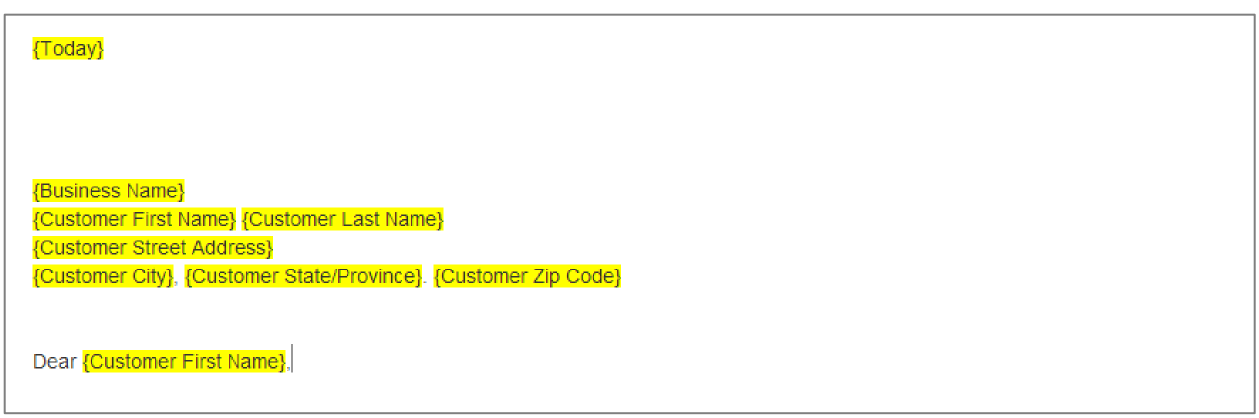
To insert your logo from the Location Preferences, click on the **Insert Items** tab on the left hand side. Then click on the System Tab and click on Logo under Placeholders.



You can insert merge fields to help you build your template. Under the System Tab you can select Today to automatically populate today's date. By default, pressing enter is double space in the HTML editor. To single space hold down Shift and Enter.



Then you will be able add additional merge fields from the Fields Tab.



All the merge fields will be highlighted in yellow, and there is no limit to the number of merge fields that can be used.

{Today}

{Business Name}
{Customer First Name} {Customer Last Name}
{Customer Street Address}
{Customer City}, {Customer State/Province}. {Customer Zip Code}

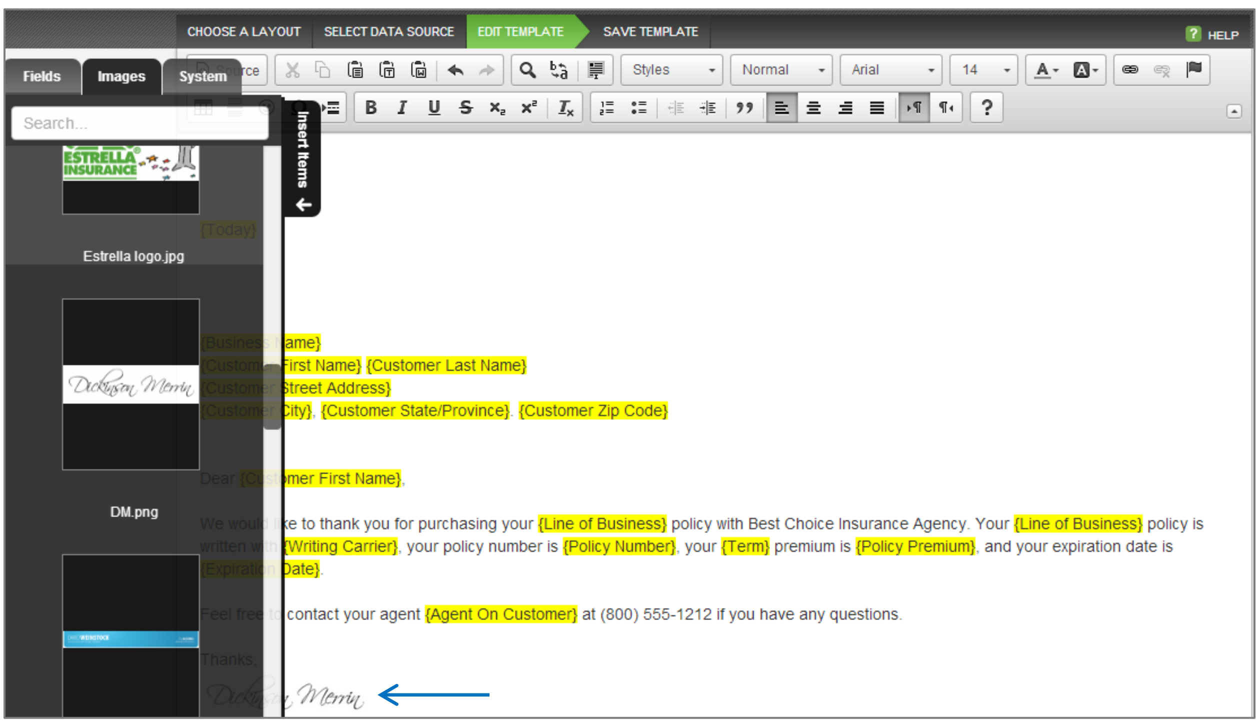
Dear {Customer First Name},

We would like to thank you for purchasing your {Line of Business} policy with Best Choice Insurance Agency. Your {Line of Business} policy is written with {Writing Carrier}, your policy number is {Policy Number}, your {Term} premium is {Policy Premium}, and your expiration date is {Expiration Date}.

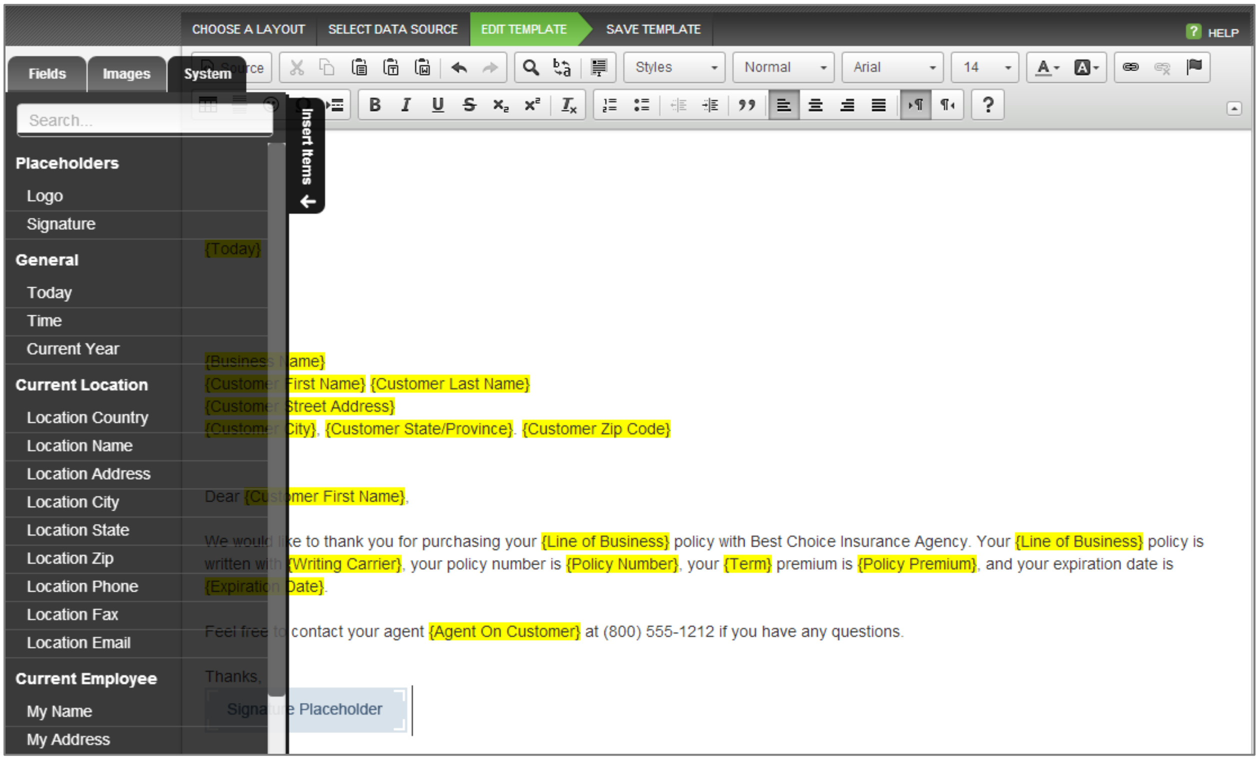
Feel free to contact your agent {Agent On Customer} at (800) 555-1212 if you have any questions.

Thanks,

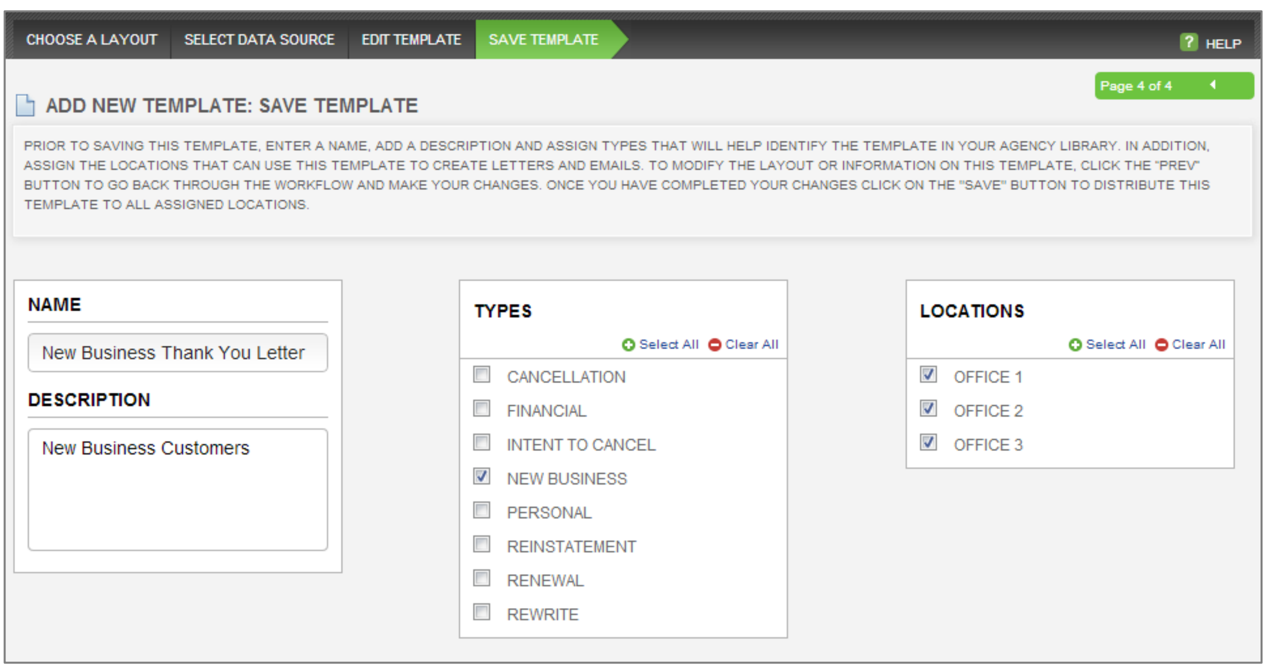
You can insert a fixed signature from the Images Tab or a signature placeholder which gives you the option of importing a signature each time the template is issued to a contact. To add a fixed signature that has been uploaded to the **Images** section, click on **Insert Items**, and click on the image.



If you prefer to insert a signature each time the template is issued, click on **Insert Items**, click on the **System** tab and then click on **Signature Placeholder**.



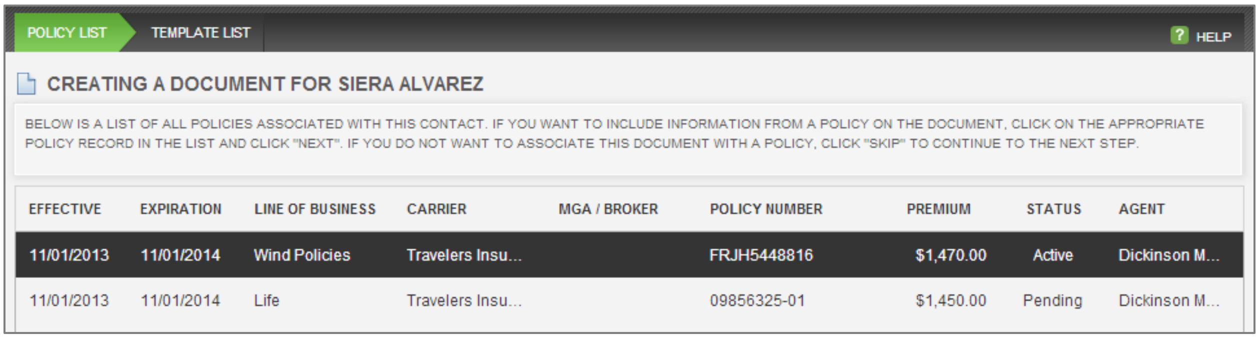
When done drafting your template click next to continue in the workflow. Title your template with a description; select the Type of document and which agency locations the template should be accessible to. Then click **Save** to exit the workflow.



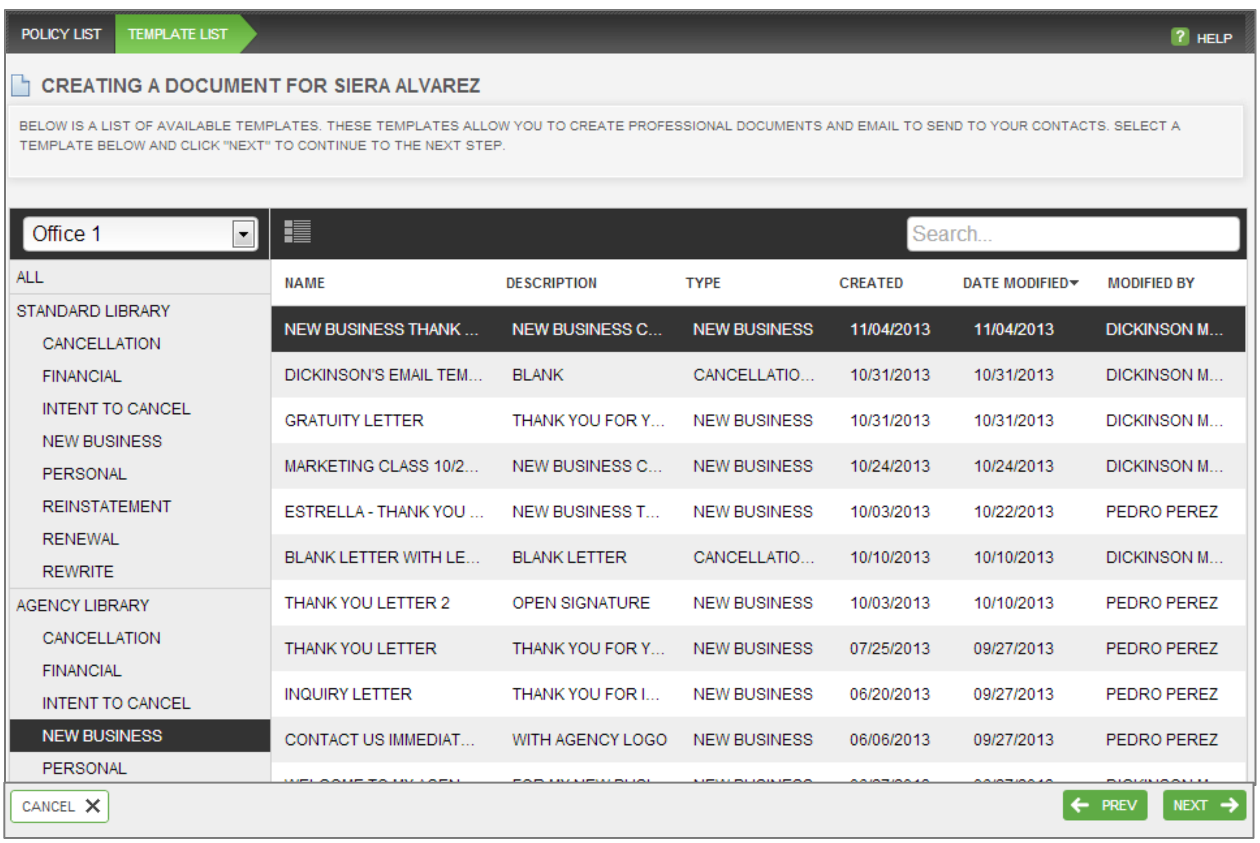
Issuing A Template

To issue a template go to the contact you'd like to issue the template to. You can click on **Print/Email** in the toolbar on the Customer Overview Screen or on the Policy Overview Screen. If your template has merge fields with policy information, you have to have a policy selected to auto populate the policy information.

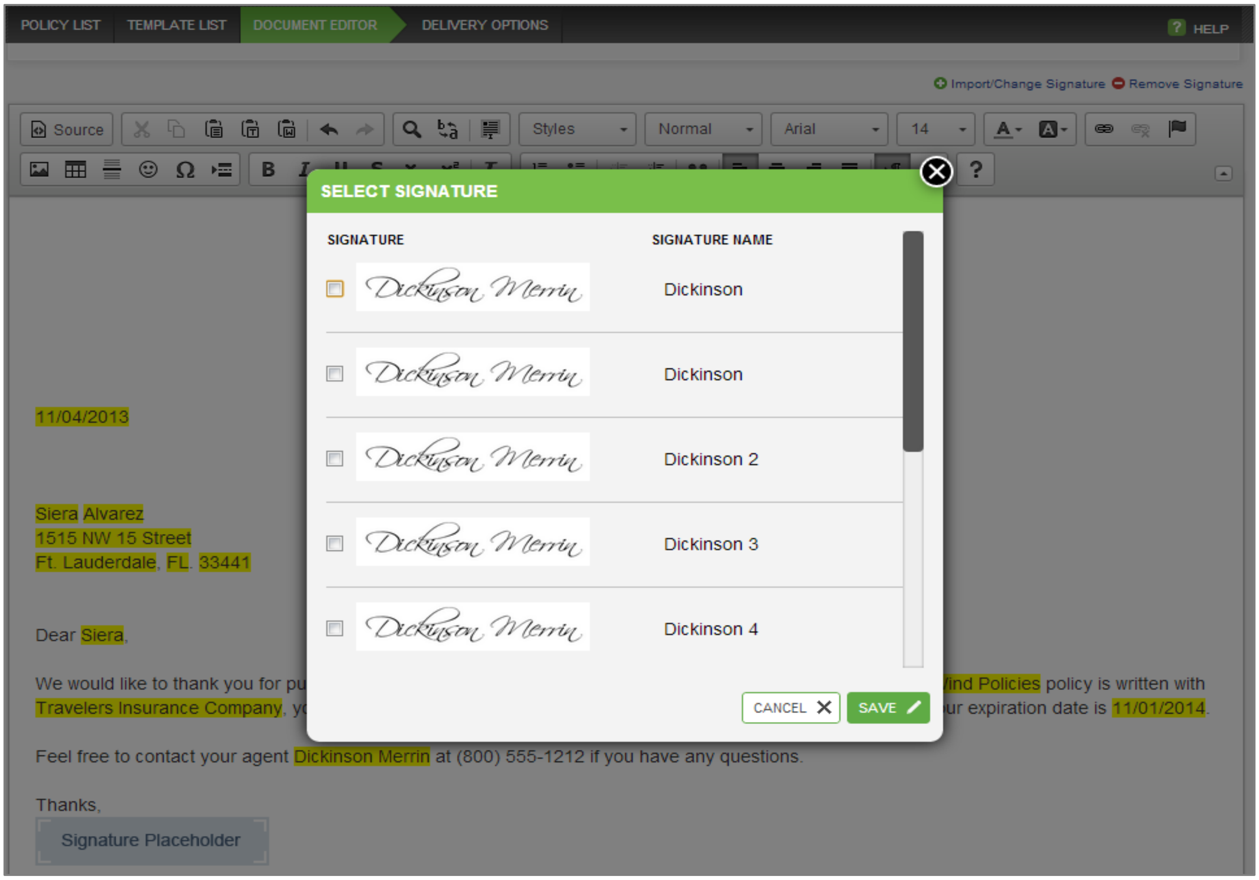
If Print/Email is selected on the Customer Overview Screen, you will need to select the policy on the first step of the workflow.



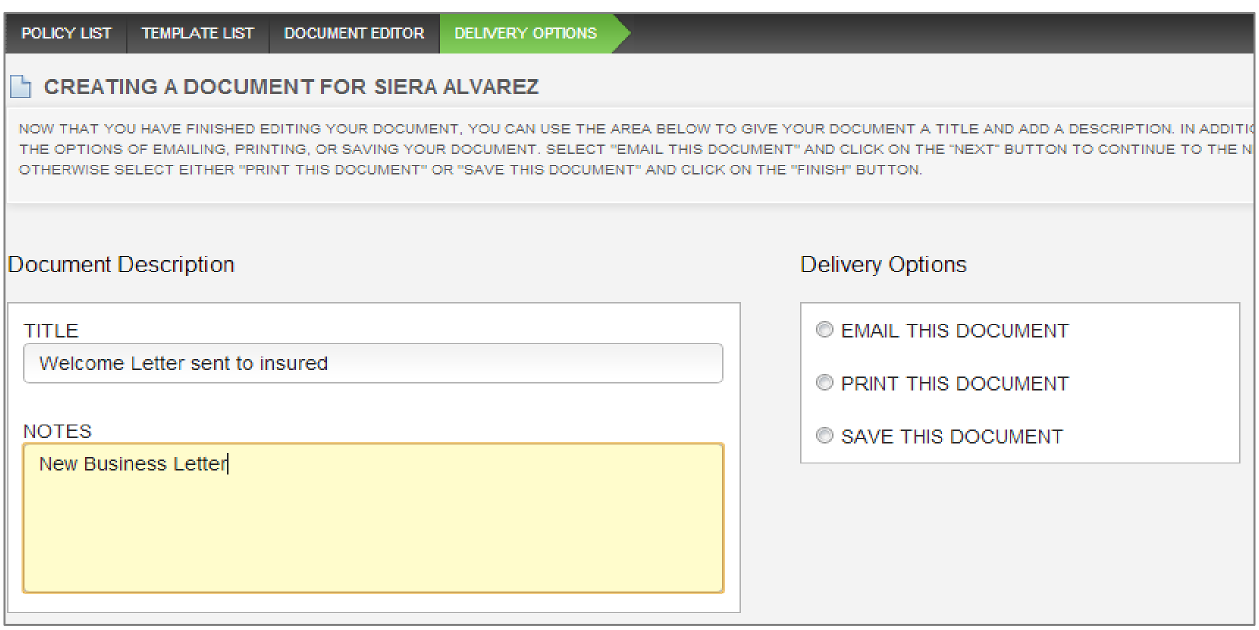
Then you will be prompted to select your template.



The logo, customer information and policy information will auto-populate into the merge fields. If you have a signature placeholder, you will see an option in the upper right hand corner to **Import/Change Signature**. The signatures are pulled in from the Location Preferences & My Preferences sections.

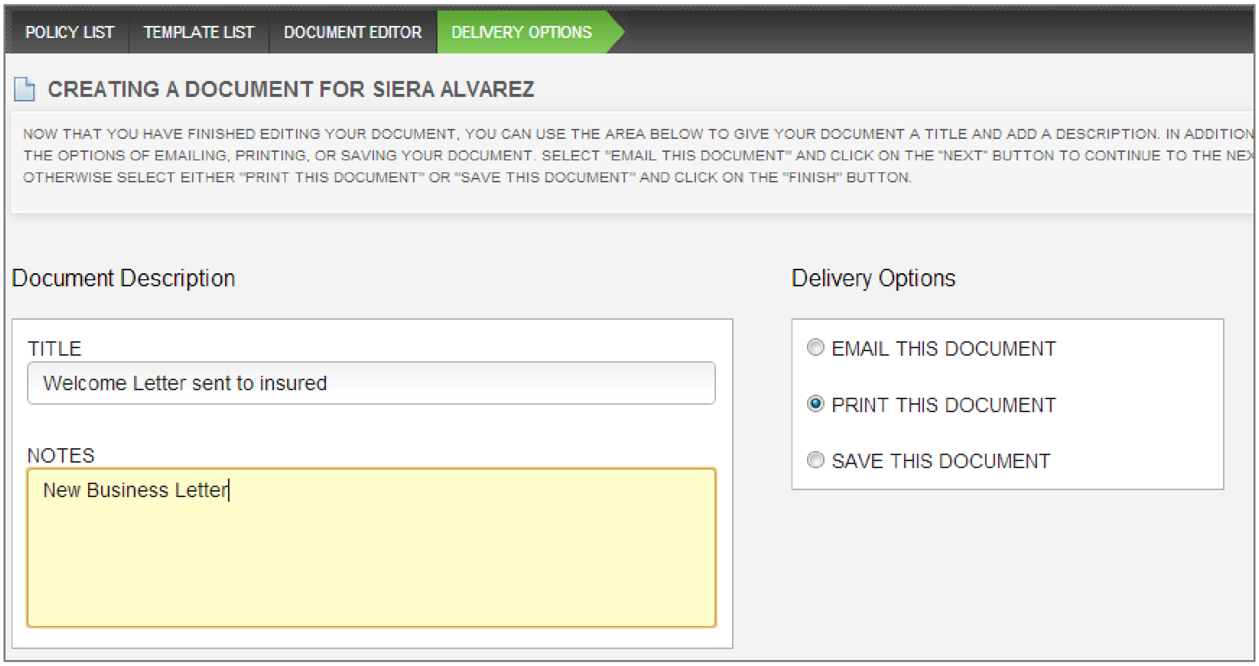


When you click **Next**, you can enter a title for the file and then select your delivery option.

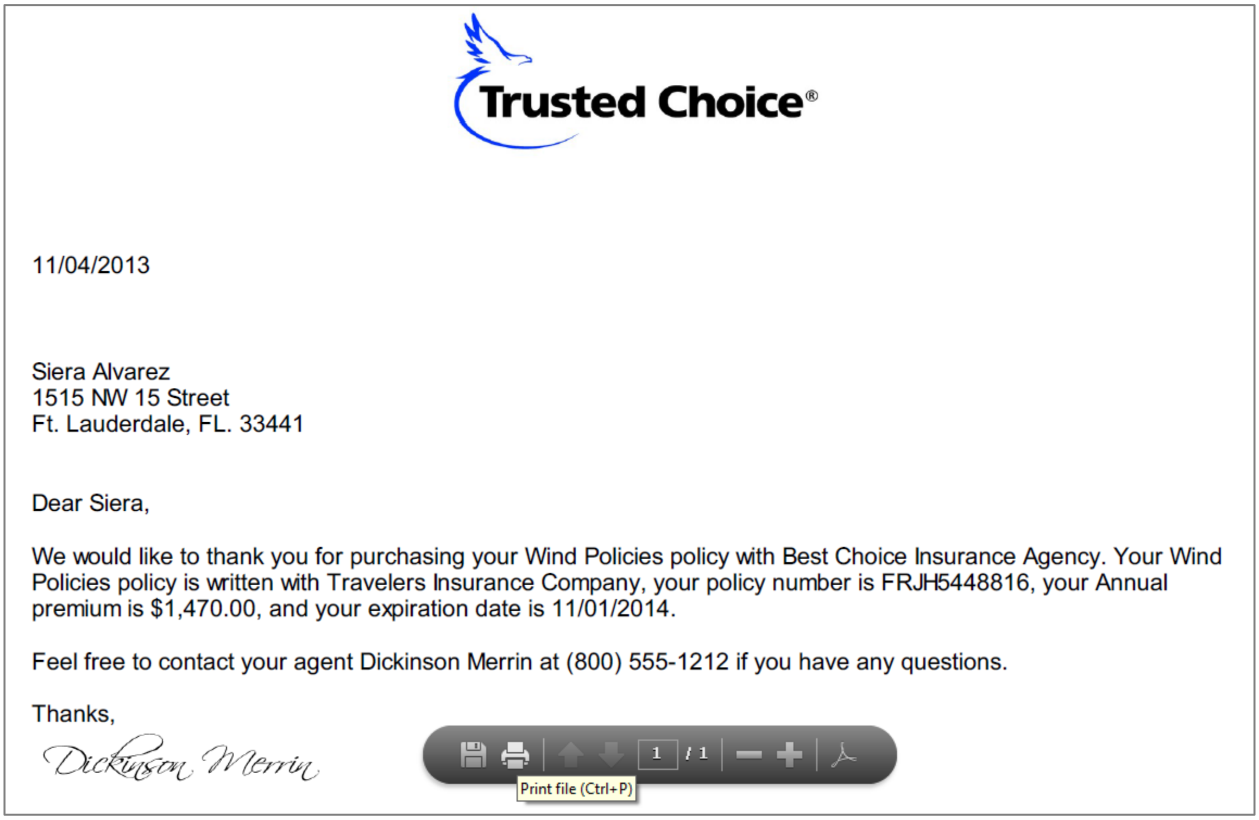


Printing A Template

If printing, select **Print This Document** and click **Finish**.



The merged document will be created for you to print in your browser. A copy of the document is automatically attached to your contact's **Files** tab.



Trusted Choice®

11/04/2013

Siera Alvarez
1515 NW 15 Street
Ft. Lauderdale, FL. 33441

Dear Siera,

We would like to thank you for purchasing your Wind Policies policy with Best Choice Insurance Agency. Your Wind Policies policy is written with Travelers Insurance Company, your policy number is FRJH5448816, your Annual premium is $1,470.00, and your expiration date is 11/01/2014.

Feel free to contact your agent Dickinson Merrin at (800) 555-1212 if you have any questions.

Thanks,

Dickinson Merrin

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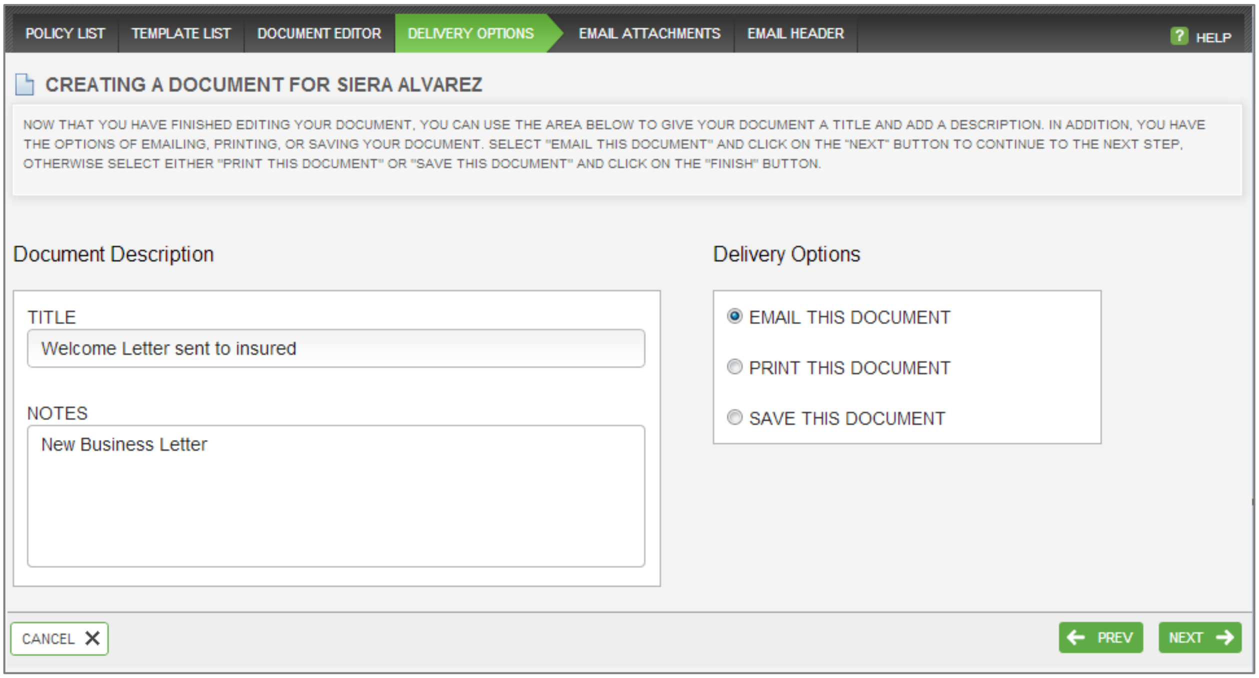
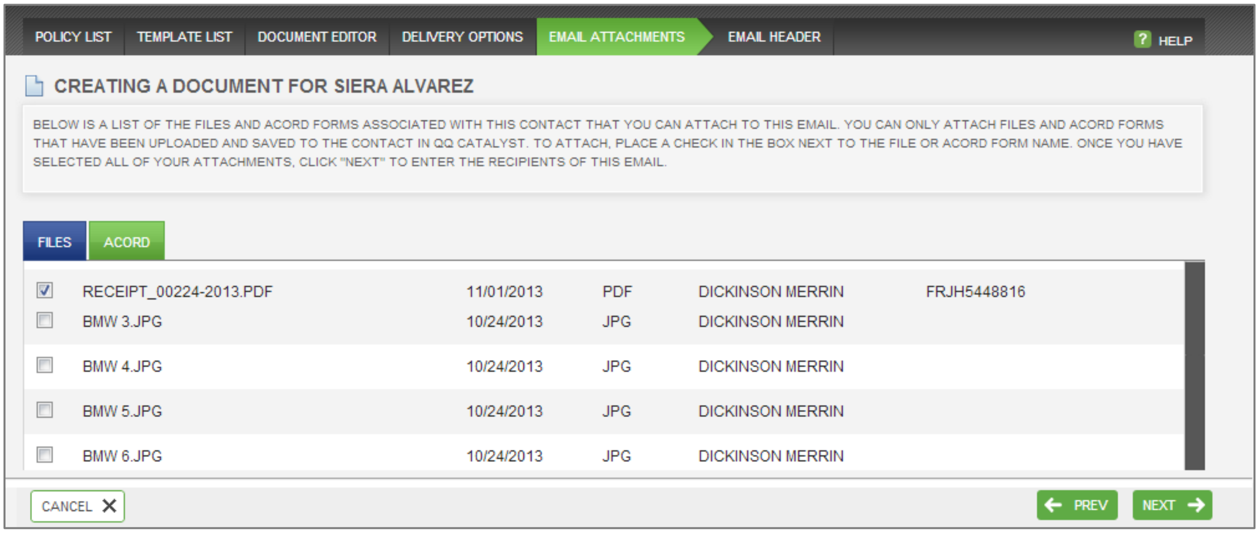
Print file (Ctrl+P)

Emailing A Template

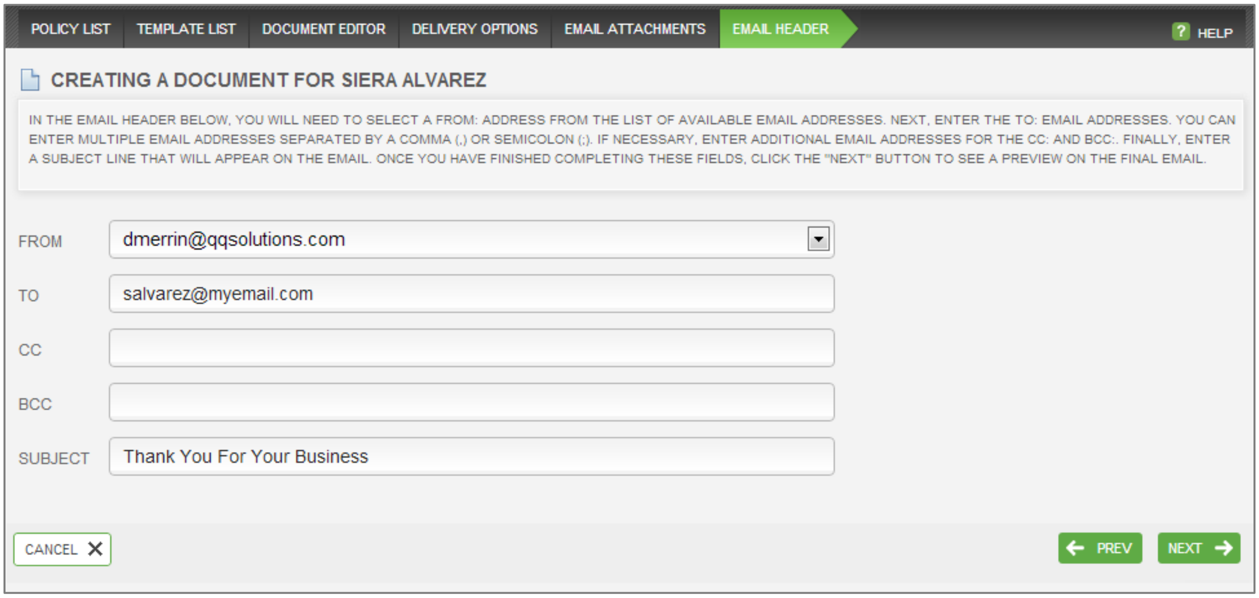
If emailing, select **Email This Document** and click **Next** to continue in the workflow.



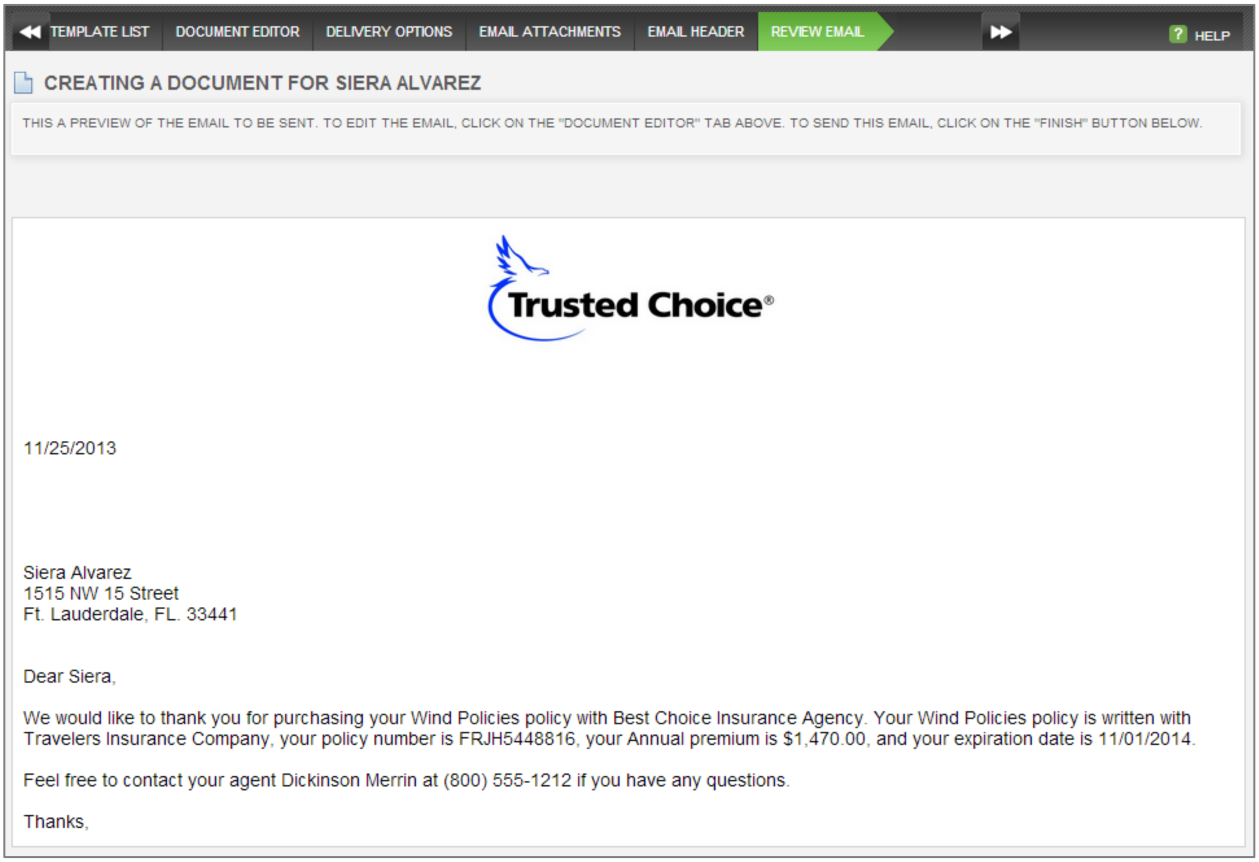
Select any files or Acord forms you would like to attach to the email and click **Next**.



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.



On the next step in the work flow you will be able to review your email. You can go back to any step to make changes.



Click **Finish** to send the email and exit the workflow. A copy of the email will be automatically attached to the contact's **File** tab and on the **Log** tab of the Customer Overview.