



Layout Templates: How Do I Remove the Attention Line on Letters?

The Challenge

When you create a letter, you see an Attention line above the name and address on the inside address. Often, such as in personal lines, this means that the name of the client is displayed twice:

Attention: Eddie Akers
Eddie Akers
P O Box 6789
Orlando FL 39283

Solution #1

Create a Layout Template without the attention line, showing only the client name. Use it whenever you want to send a letter that does *not* have the Contact name and Client name in the inside address.

Eddie Akers
P O Box 6789
Orlando FL 39283

For advanced solutions, contact our office at 877.772.4677 x1212

How To

Copy InStar Letter Template

First, make a copy of the InStar Letter Template that came with your system. Do not change this template. Only change copies.

- Open Letter Layout templates
 - Main Menu > Setup System > Template Tables > Letter Layout templates
- Open the “Letter Template” which came from InStar
 - Click List
 - Select “Letter Template”
 - If you changed the name of the template that InStar sent, select that name
 - Click ok
- Duplicate the Letter Template



- Click Duplicate
- Enter information
 - Template Group: Select the Insured group, as this is typically used to correspond with Insureds
 - Type: Letter
 - Description: Letter Tmpl - No Attn Line
 - Agency: All (typically)
- Delete the attention line (from the duplicate template you just made)
 - Highlight the attention line
 - Click Delete
- Save

Note: If you want this to be your default template whenever you create a letter, check the Default Template box.

Use the New Template

If you made this the default template, whenever you add a new Letter it will use this template, without the Attention line.

If you did not make it the default template, whenever you do not want an attention line on your Letter, select this template. From within the Letter you are creating:

- Click Layout
- Select other template..
 - Select the Letter Tmpl - No Attn Line template from the list
 - Click Ok
- The new layout without the Attention line is applied to your letter.

Tips: Select the Layout Template before adding text to your Letter. If you forget, you may want to copy the text that you entered before you select a new Layout Template.

To learn more about Letter Templates, register for **Sutdio Letter Templates, Basics-2-BlastOff** or contact our office.

By: Rebecca Koos, CIC

Principal

PeopleInsure ... *Accelerate Your Success*SM

www.peopleinsure.com | 877.772.4677 x1212