How to set up message templates

Date:	September 2020
Author:	Tessa Lee
Version:	1.0
Classification:	Client Confidential

Contents

Change Control History

Version	Author	Date	Details	Reviewed by / Issued to
1.0	TL	September 2020	Initial Version	All firms

Make communications easy and consistent with message templates.

It's really easy to create secure message templates in moneyinfo manager (MIM).

These can be used for anything from a simple acknowledgment message, requests for information, to sending out review packs. The message templates are potentially a massive time-saver and will -

- Reduce errors as there's no need to retype anything.
- Personalise the message by inserting fields for your client's name and other details.
- Ensure a consistent communication style across your team.

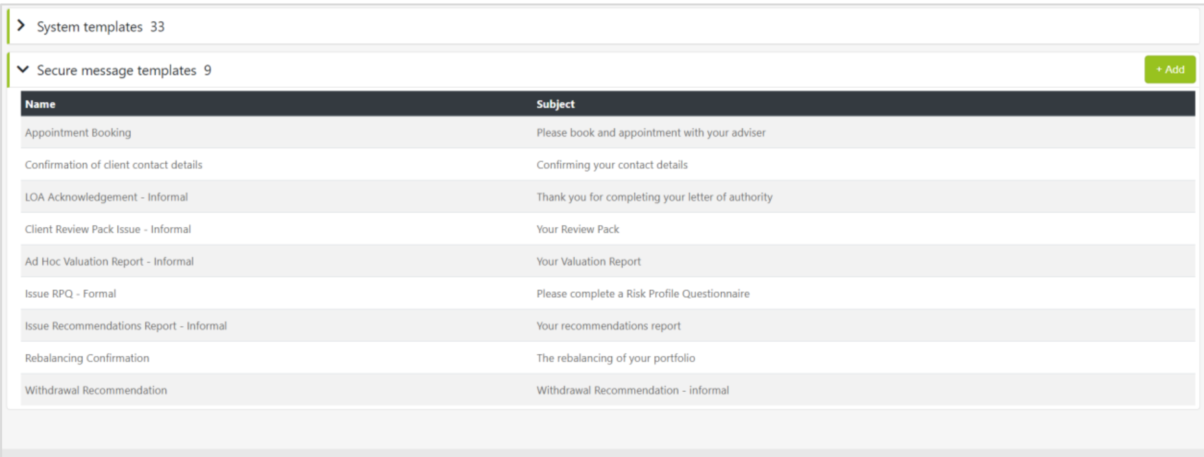
The message can be used time and again and avoids copy and pasting. To use a template, you simply select it from the list of templates, and it will be personalised for your client and sent in just a couple of clicks. The message can be edited before sending if you want to make slight changes or add a personal note.

How to set up your message templates

Secure message templates are really easy to set up. Here's how you do it:

Your Operator record will need to have the 'Default Settings' role ticked in order to create templates.

Login to MIM and select the Settings menu. From here, click on the Templates tab. You'll see two sections 'System Templates' and 'Secure message templates'.

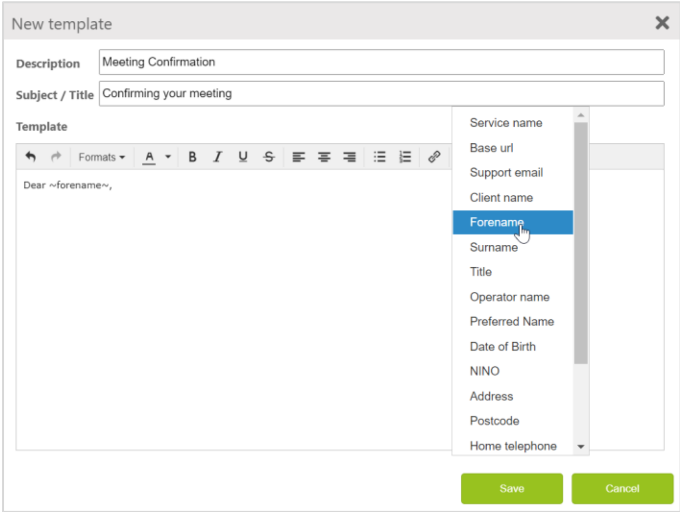

System templates 33

Secure message templates 9

+ Add

Name	Subject
Appointment Booking	Please book and appointment with your adviser
Confirmation of client contact details	Confirming your contact details
LOA Acknowledgement - Informal	Thank you for completing your letter of authority
Client Review Pack Issue - Informal	Your Review Pack
Ad Hoc Valuation Report - Informal	Your Valuation Report
Issue RPQ - Formal	Please complete a Risk Profile Questionnaire
Issue Recommendations Report - Informal	Your recommendations report
Rebalancing Confirmation	The rebalancing of your portfolio
Withdrawal Recommendation	Withdrawal Recommendation - informal

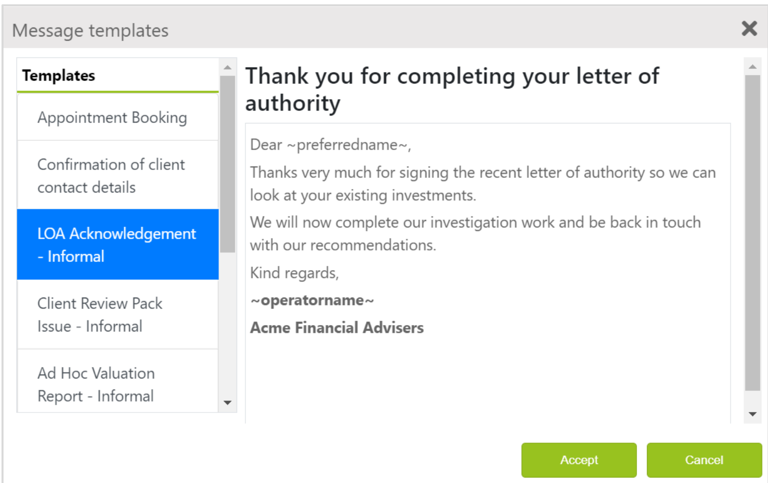
Click the Add button on the right and you'll see the 'New template' dialog:



Enter a description for the template and fill in the Subject and message content. You can use the toolbar at the top to format your text or to insert merge fields for example for your client's name.

Once you are happy with your message template click Save. You can always come back later and edit the template if you wish by choosing the Edit option from the Action menu.

Once your templates are set up, operators can use them when sending individual or bulk messages to clients by clicking on the 'Templates' button in the message toolbar and selecting the relevant template:



You can then personalise the message further if you wish by typing in additional text.

Here's some ideas on the types of messages you could create message templates for:

- Requesting or confirming meetings.
- Acknowledging documents clients have sent you such as LOAs or other correspondence.
- Confirming actions you have taken for your clients.
- Sending out review packs, recommendation reports or portfolio reports.

Why waste time writing the same stuff over and over again? Give secure message templates a try and see how you can simplify your client communications and save time on repetitive tasks.

If you need to see secure templates in action watch our 'Enhancements to Communications Features' webinar recording which you can find in the moneyinfo **Communications Library** – just click on the Help menu from within MIM.

If you need any help with this or getting started with any of the features of your portal, please give our Support team a call on **03303 600300**. We'd love to hear from you.