

#### REFERENCE LIST OF FIELD TAGS

NIUG members can download a complete list of the current field tags from [www.instarusers.org/members](http://www.instarusers.org/members). You can also create your own list by using the **Export Tags** feature on the *Select InStar Fields* window in **Letter Templates** and **Word Doc Templates** in the Setup area.

#### ADDING FIELD TAGS TO LETTER TEMPLATES

1. Click on **Main Menu** → **Table Setup** → **Other Template Tables**
2. Click on **Letter Templates**
3. Select a letter and click on **Edit** (or click **Add** to create a new one)
4. To create a list of field tags to insert, click on the **Fields** button
5. Select the field tags that you want to use and click on **Add**
6. In the body of your letter, click on the **Insert Field Tag** button to display the list of tags that you selected in Step 5
7. Click on the one you wish to insert or type the field tag, such as [CLNAME], directly into the letter.

#### USING LETTER TEMPLATES CONTAINING FIELD TAGS

1. Open a client record and click on the **Letters** button
2. Click on the **Add Letter/Fax** button
3. Click on the **Form Ltr** button
4. Select your form template and click on **Load Selected Letter** button
5. The field tags will automatically display the data from the database
6. Print, fax, or email your completed letter – it automatically saves the completed document to your policy

#### ADDING FIELD TAGS TO WORD DOCUMENTS

1. Launch Microsoft Word and create a new document
2. To determine which field tags to use, refer to the list available on the **Fields** button in the **Letter Templates** window or use the Microsoft Excel worksheet created by exporting the tags
3. Type the field tags directly into the document, such as [CLNAME].
4. If you don't have a field tag, you can insert a blank form field into the area of the form as a placeholder for manually completing the info.
5. Click on **File** → **Save As** and select **Document Template (\*.dot)** in the *Save as type* field

#### SETTING FORMAT DEFAULTS ON FIELD TAGS

1. Click on **Main Menu** → **Table Setup** → **Other Template Tables**
2. Click on **Word Doc Templates**
3. Click on the **Field Ref** button
4. Select a field type to display the available fields
5. Click on the field to display the available format options:
  - (a) Click on **Apply** to set the default for a selected template
  - (b) Click on **Set as Default** to set the global default on all templates

#### ADDING WORD TEMPLATES TO INSTAR

This process embeds a copy of your Microsoft Word template into the InStar data file so that it is available on the Word Merge function in *Client Lists* and *Policy Lists* as well as from the **Custom Forms** button.

1. Click on **Main Menu** → **Table Setup** → **Other Template Tables**
2. Click on **Word Doc Templates**
3. Click on the **Add** button
4. Click on the **Choose Doc** button
5. Locate the template you wish to add and click on **OK**
6. Select **Policy Form**, **Letter**, or **MGA Quote** from the *Type* field
7. If you selected **Policy Form** in Step 6, select **Personal**, **Commercial** or **All** from the *Sub-type* field in order to segregate your forms
8. Type a brief description of the template in the *Description* field. This is what will appear in the **Custom Forms** list, so be concise and accurate.
9. Click on **Save** and the new form will drop into the lower list section.

#### UPDATING A WORD TEMPLATE

The **Open Doc** button is only used for viewing your document templates. It does not allow you to update the template. In order to make changes to your document, open the original template (.DOT) file in Microsoft Word and save your changes, then replace it in InStar as follows:

1. Click on **Word Doc Templates**
2. Select the template that you want to replace and click on **Delete**
3. Click on the **Add** button and follow the steps outlined in the previous section (*Adding Word Templates to InStar*) to add the new version of your template

#### USING WORD MERGE FORMS FOR INDIVIDUAL POLICIES

1. Open a client record and select a policy
2. Click on the **Forms** button
3. Click on the **Custom Forms** button
4. Select a template from the drop-down list
5. Click on the **Create Form** button to print the form immediately. Put a checkmark in the *Wait for confirmation* box in order to display your merged file in Microsoft Word when you click on **OK**.
6. Make any necessary changes, and then switch back to InStar without saving the document.
7. On the *The document will not print until you click Yes* window, click the **Yes** button
8. The completed form will be listed in the *Custom Policy Forms* window.

#### USING WORD MERGE FORMS IN LISTS

1. Click on **Main Menu** → **Lists** → **Client List** or **Policy List**
2. Make your list selections and click on **OK**
3. Click on the **Word Merge** button
4. Select the items you wish to merge and click on **Print Sel** or click on **Print All** to merge all of the items on your list
5. Select the form template that you wish to merge
6. Put a checkmark in the *Wait for confirmation* box in order to preview each merged document before processing
7. Click on **OK** to launch Microsoft Word and display your merged file
8. Make any necessary changes, and then switch back to InStar without saving the document
9. On the *The document will not print until you click Yes* window, click the **Yes** button
10. If you selected multiple items in Step 4, the next merged file will display in Word. Repeat Steps 8 and 9 until all of the items are processed.
11. Click the **Cancel** button to close the *Options* window

Note: Forms processed by this method will be saved to each client file under the **Forms** (not **Letters**) button on the *Customer Information* screen

#### SETTING UP WORD TO DISPLAY YOUR INSTAR TEMPLATES FOLDER

This must be done from each workstation

1. Launch Microsoft Word and click on **Tools** → **Options**
2. Click on the **File Locations** tab
3. Double-click on **User Templates**
4. Browse to your **INSTAR/Templates** folder on the network
5. Click on **OK** to close the *Modify Location* window

From now on, whenever you save a Word template, it will automatically be stored in the **INSTAR/Templates** folder.

***If you don't have time to build these custom forms yourself, help is on the way!***

Call Kim Floyd at 970-252-1684 or fax your forms to 603-307-6148 for a free estimate on creating Word Merge templates for this Custom Forms module. For further details, visit [www.intranetconcepts.com/forms](http://www.intranetconcepts.com/forms).