



How to Generate User Login Letters

In this video we will discuss how to send user login letters. If you decided that you want to allow your users to login and update their contact information, our system can generate a personalized letter for you. There are two ways to do this. The first is to simply print out the paper and the second is to email them to your users.

To print out your login letters, simply hover over users and select view users. Scroll to the bottom of the user screen and click on the button labeled "Generate Login Letters". Your computer will automatically download the login letters for you. When you open the file, you will be able to print them out and distribute them to your users.

If you'd like to email them to your users, I'll show you a trick we've been doing for years. You'll begin in the same way as printing out the letters. Go ahead and click on "Generate Login Letters", then copy one letter to use as a template. From here, you can go to your templates screen or to your send alerts screen. For the purposes of this video, we will create a template with the login letter, so we can use it again the next time we need to send it out. Simply hover over alerts and select templates from the drop-down menu. our template type will be email and the subject line will be login letters. If you'd like to enter a template ID, feel free to do that here. Since we are copying from Microsoft Word, we'll click on the clipboard with the blue W, paste the copied information there to remove any hidden coding. From here we're going to insert some codes that we have established to personalize each of your letters to your specific user. Replace the name with either \$firstname\$ \$lastname\$ or simply \$name\$ for their whole name. Remember there are no spaces between first name and last name. Next where you see a place for username and password, you're going to enter \$user_name\$ and \$password\$ respectively. Now, since we are creating a template, we'll go ahead and save our changes.

In order to email your login letters to your users, simply hover over alerts and select send alerts. Select the group you would like to send your email to, typically all users. Following across the screens drop down menus, after you have chosen the method as well as the escalation level, you'll see a spot where you can insert a template. Simply click on the template you'd like to enter and click insert template. After this, there is no need to make any changes on the screen. Simply scroll down and select send now or send later.



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Thanks for watching! If you have more questions, please feel free to contact our Customer Success Team at support@highgroundsolutions.com.