

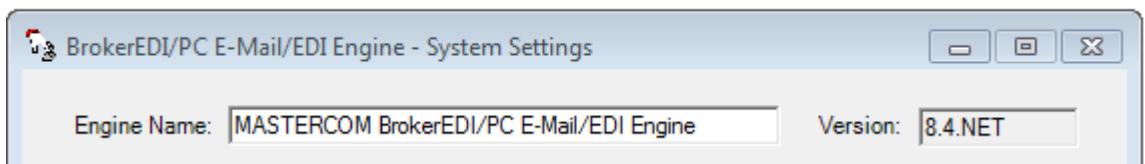
Fast Install Steps (Version 8.6)

The BrokerEDIPC E-Mail-EDI Engine .NET installation can consist of three installs.

- a) Run **setup.exe** on a PC in the office to install the engine software in an \EMAIL folder on the server and a set of shortcuts in a **BrokerEDIPC E-Mail-EDI Engine .NET** program folder on the PC. **See step 3 below, and run setup.exe from the mapped drive.**
- b) Install **setupClientForEMail.EXE** on all PCs in the office so users can attach files to their CSIO e-mail messages and policy change forms. See instructions on page 5.
- c) If you wish to enable another PC in the office to do the upload/download communications run **setupppc.exe** to install the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder on that PC. See instructions on page 7.

Install of Setup.exe

To find the version you have installed, in the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the **Settings – System** program-item and the version is given in the upper right hand corner as shown below.



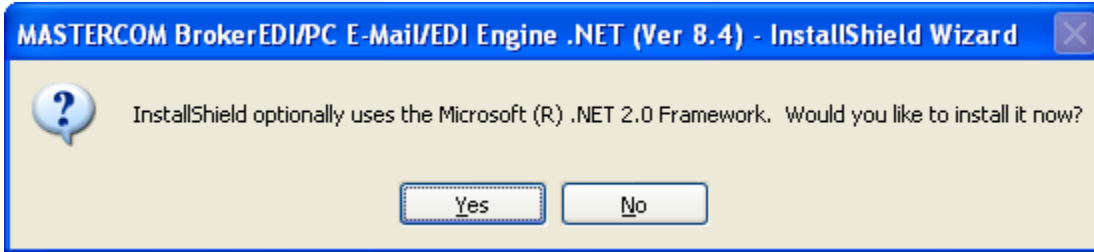
- 1) Go to the user's PC that will run the upload/download communications.
- 2) Contact the CSIONet Help Desk Phone: 1-416-360-1773 or toll free at 1-800-463-2746 Email: helpdesk@csio.com for the instructions to connect to CSIONet (<https://csionet.com>) downloading the Juniper Networks SSL VPN Network Connect 6.1.0 application software.
- 3) Download **setup.exe** from MASTERCOM's web site and save it in the mapped drive where the folder \BRO resides, as illustrated below. In this case the mapped drive is R.



- 4) Double-click **setup.exe** to start the installation.

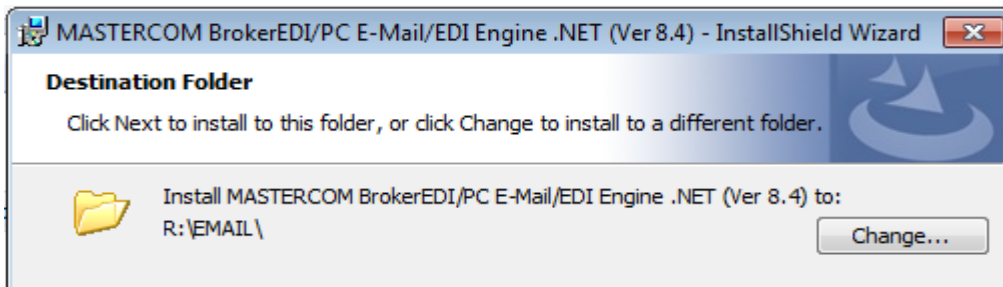
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If you get:

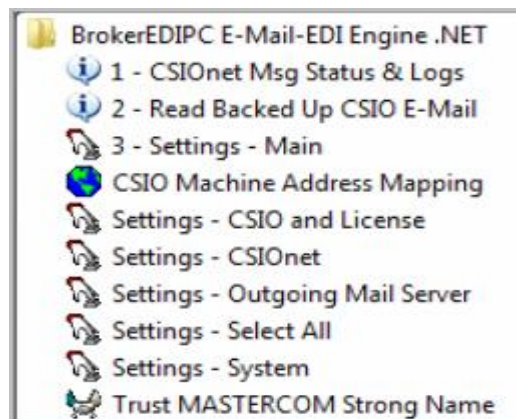


select the **Yes** button to install the .NET 2.0 Framework. Afterwards you can check the .NET Framework was installed by clicking the **Start** button, **Control Panel**, Windows XP – “**Add or Remove Programs**”, **Windows 7** – “**Programs and Features**”

After reading and agreeing to the license agreement, select **I accept ...** and the **Next** button. For a **User Name** specify the name of the user for the PC, for **Organization** specify the brokerage name and for **Serial Number** your MASTERCOM product id. Take the suggested “**Destination Folder**” as illustrated below.

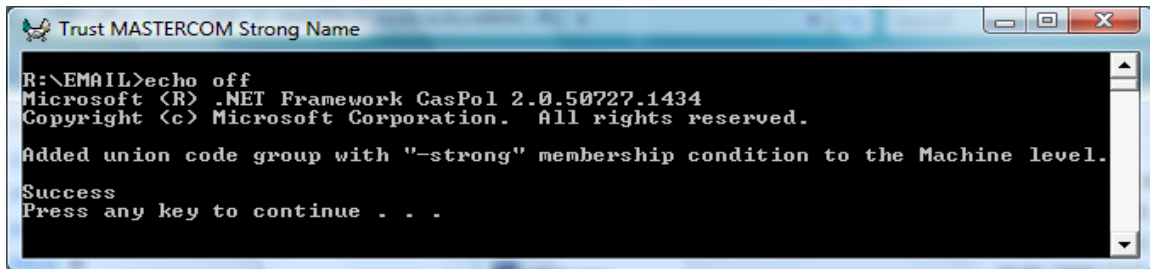


The following is the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder that is created.



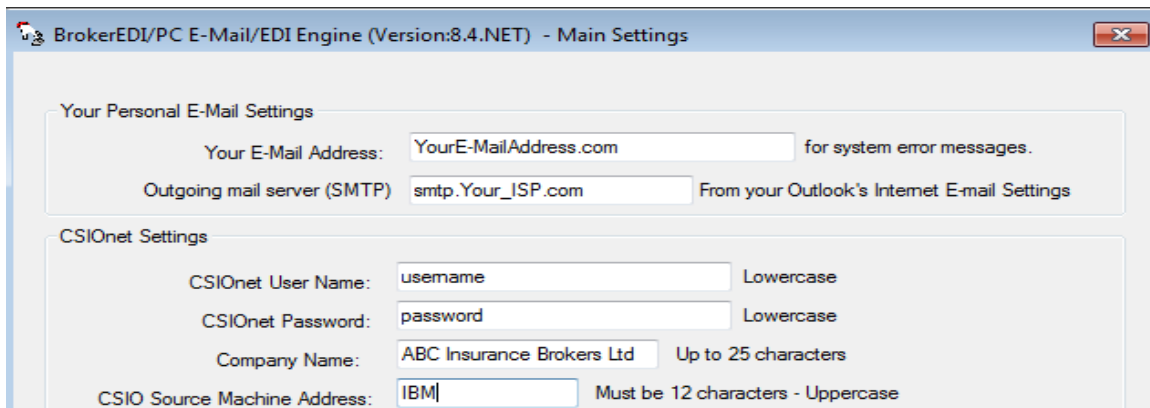
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- 5) Click **Start, All Programs**, and in the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder click the “**Trust MASTERCOM Strong Name**” program-item to modify your security policy to trust the MASTERCOM “strong name”. For **Windows 7** you must **right click** and “**Run as administrator**”. This will add MASTERCOM’s strong name to your security policy’s machine policy level. You should see the following command window open, if asked, type “**y**” and <**Enter**> to accept the policy change and you should see that “- strong” membership was added with “**Success**”, as shown below.



```
R:\EMAIL>echo off
Microsoft (R) .NET Framework CasPol 2.0.50727.1434
Copyright (c) Microsoft Corporation. All rights reserved.
Added union code group with "-strong" membership condition to the Machine level.
Success
Press any key to continue . . .
```

- 6) In the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the **3- Settings – Main** program item.



BrokerEDI/PC E-Mail/EDI Engine (Version:8.4.NET) - Main Settings

Your Personal E-Mail Settings

Your E-Mail Address: for system error messages.

Outgoing mail server (SMTP) From your Outlook's Internet E-mail Settings

CSIONet Settings

CSIONet User Name: Lowercase

CSIONet Password: Lowercase

Company Name: Up to 25 characters

CSIO Source Machine Address: Must be 12 characters - Uppercase

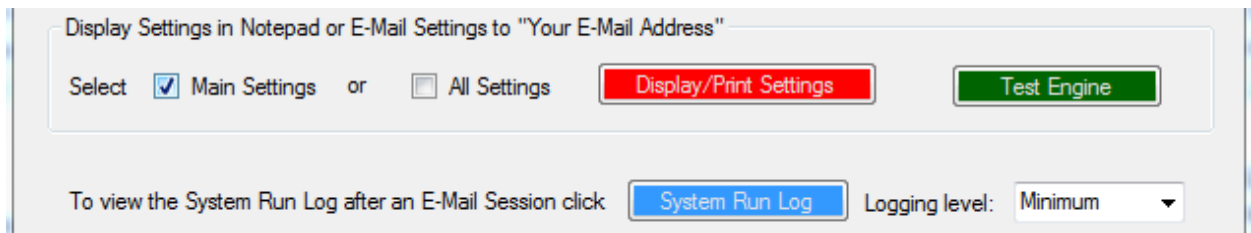
- 7) Replace **YourE-MailAddress.com** with your open internet e-mail address you use everyday.
- 8) Replace **smtp.Your_ISP.com** with your ISP’s Outgoing mail server (SMTP) which you would find specified in your e-mail client e.g. Microsoft Outlook. If you have a Microsoft Exchange Server you would specify the IP address, of the PC that is hosting the Exchange Server.
- 9) Specify your CSIONet username, password and CSIO Source machine address etc. You would have received these values from CSIO when you subscribed to CSIONet.

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- 10) You can change your company name (up to 25 characters) used to identify you in your e-mails to your insurance companies.
- 11) Select the **OK** button to save the settings.
- 12) For your Firewall/Antivirus Software: Give xmailer.exe, located in \EMAIL\EXE, rights to ports 25 and 110 and not scan incoming and outgoing e-mail. If your antivirus software does not permit you to be selective regarding certain programs then disable the antivirus software for the duration of the upload/download session.

If you cannot configure your antivirus to not scan outgoing e-mail sent by xmailer.exe and you do not want to disable scanning of outgoing e-mail then you must in **Settings – CSIONet** set the **Connection to Connect using local area network (LAN)** and make the connection to CSIONet manually before doing your Power Broker **Send and Receive E-Mail/Policies**.

- 14) You can now run a test by selecting the **3- Settings – Main** program item and clicking the **Test Engine** button, as shown below. In previous releases this button was labeled as the **E-Mail** button. A settings report will be e-mailed to the System Administrator and download retrieved from your CSIONet EDI mailbox.



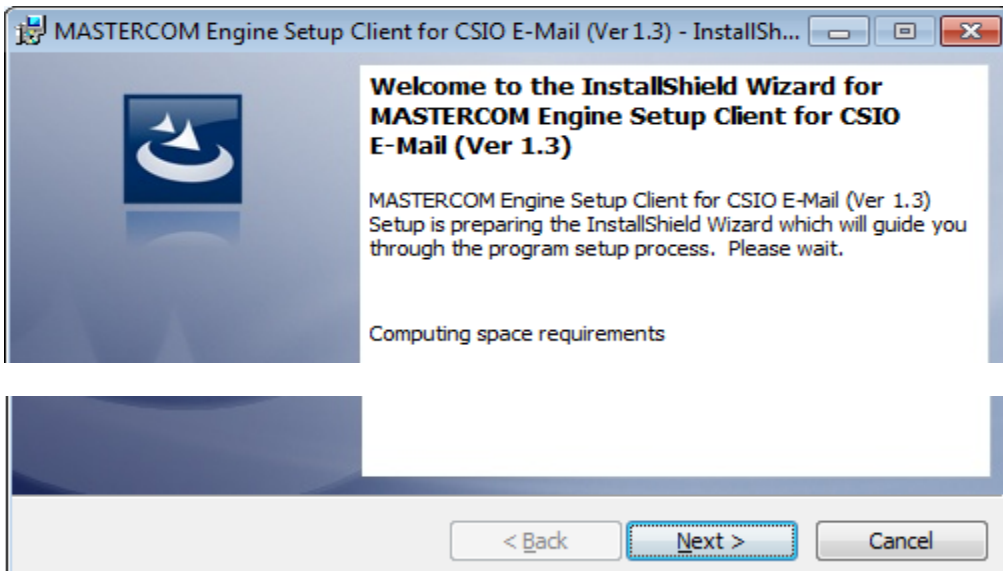
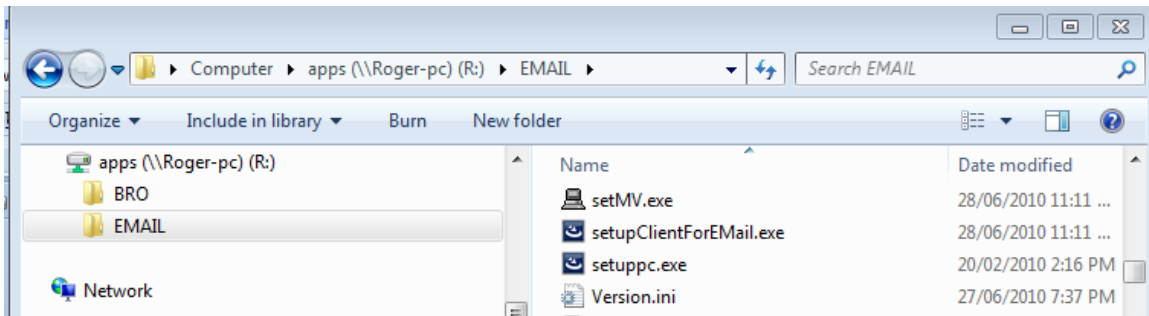
Note: ***If you are on Windows 7 32 bit operating system*** the SSL VPN connection does not work using the Juniper NcLauncher so you must choose the MASTERCOM Automatic Login method. In the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the “**Setting- CSIONet**” program-item and select the **Login Method** of “**MASTERCOM Automatic Web Browser Login**”. Select the **OK** button to save the setting and run the test again. Note: Juniper NcLauncher works on a Windows 7 64 bit operating system.

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Install of SetupClientForEMail.exe

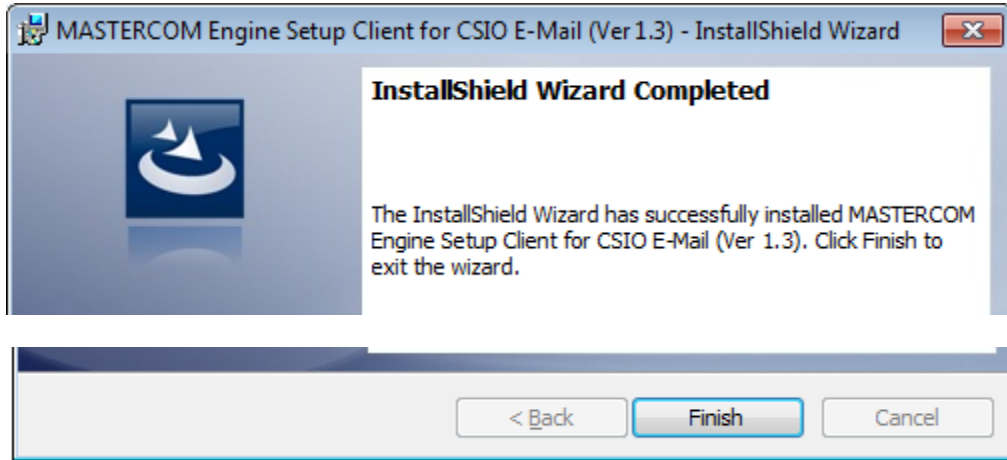
Power Broker users can now attach files to their CSIO e-mail messages and policy change forms. To install the “**Attach File Command**” program on a user’s PC do the following steps. Note: CSIO asks that only PDF and jpeg files be attached but if you wish to attach other files you should check with the insurance company to see if they can receive them.

- 1) At each user’s PC explore to the \EMAIL directory and double-click **setupClientForEMail.EXE** to start the installation, as shown below.



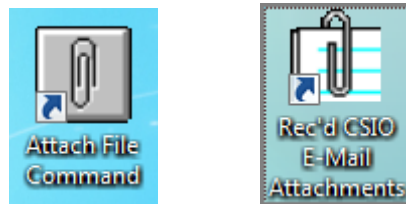
Click the **Next >** button to continue.

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Click the **Finish** button to finish the installation.

The following two shortcuts are placed on your desktop and in a “**BrokerEDIPC E-Mail-EDI Engine .NET**” program folder.



Use the “**Attach File Command**” icon to specify a file to be attached to your Power Broker “**Forms**” memo.

The “**Rec'd CSIO E-Mail Attachments**” icon opens the “**\EMAIL\AL3MAIL\AttachmentsRecd**” folder to access any received attachments.

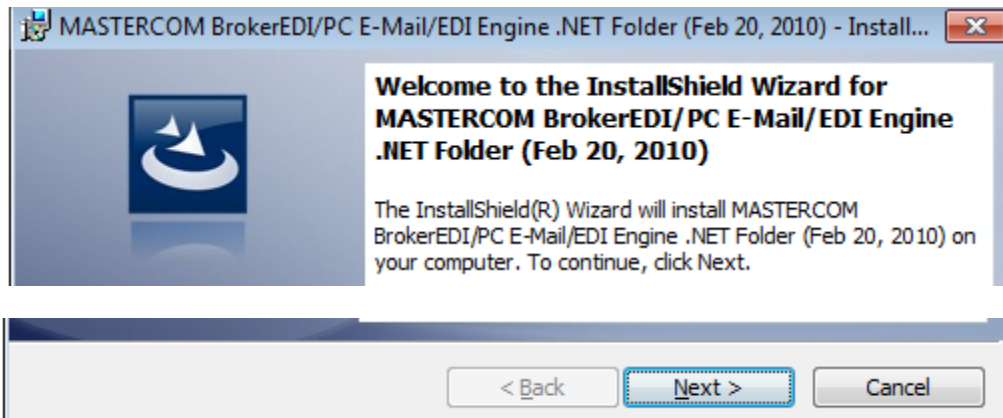
See “**Adding an Attachment to a Policy Change Form**” document for a demonstration of the use of the “**Attach File Command**” to attach files.

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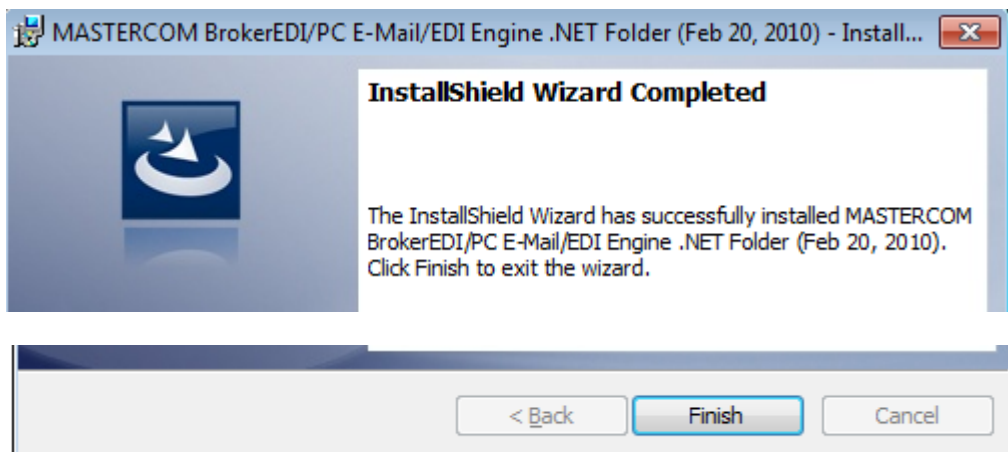
Install the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder

Enable another PC in the office to do the upload/download communications by running **setuppc.exe** to install the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder.

1) At a PC explore to the \EMAIL directory and double-click **Setuppc.exe** to start the installation, as shown below. Setuppc.exe installs shortcuts to programs in the \EMAIL folder on the server.



Click the **Next >** button to continue.



Click the **Finish** button to finish the installation.

2) Reboot the PC.

3) In the “**BrokerEDIPC E-Mail-EDI Engine .NET**” program folder select “**Trust All**”.

4) Connect to CSIONet (<https://csionet.com>) downloading the Juniper Networks SSL VPN Network Connect 6.1.0 application software. See step 2 of “Install of Setup.exe”.