

Sending a Power Broker Forms CSIO E-Mail Message

1) Click the **Forms Generator** button.

The screenshot shows the 'Customers & Prospects Data Centre' application window. The 'Forms Generator' tab is active, displaying a form for customer data. The form includes fields for Customer Code (30006), Status Code (SPE), Producer, Name (Test Customer), Language (E), Mail To (R/B) (R), Additional Name, Home Address (99 Main Street), Postal Code (M8Y 2H9), Reference, City / Province (Some Town/Some Province), Tax Region (BC), Home Phone, and Fax Number.

2) Click the **Form Name** you want and then click the **Proceed>>** button.

The screenshot shows the 'Select Forms Generator Forms' dialog box. It contains a table with the following data:

Form Name	Form Description	Table	InUse	Lang
BLANK	Blank Letter	B		E
PROSP2	Prospect Letter re Automobile Insurance	B		E
PROSPECT	Prospect Letter (Sample)	B		E

At the bottom of the dialog box, there are three buttons: Search, Proceed, and Return.

3) Type **E**, in the **Send to:** box.

Type **Y** or **N** <Enter> key in the **Save Memo to Customer's File (Y/N)?** box.

The screenshot shows the 'Print, Send to Outlook or Email Policy Change Forms' dialog box. It displays the following options:

Send to : (P) Printer/Fax (O) Outlook (E) E-Mail : **E**

Save Memo to Customer's File (Y / N) : **Y**

4) Put your cursor in the **Enter E-Mail Company Code** field and press the <Enter> key to display the CSIO Company Table.

The screenshot shows the 'Print, Send to Outlook or Email Policy Change Forms' dialog box with additional fields filled in:

Send to : (P) Printer/Fax (O) Outlook (E) E-Mail : **E**

Save Memo to Customer's File (Y / N) : **Y**

Enter E-Mail Company Code : [Dropdown menu]

Enter Form / Memo Abeyance Date : **08/06/2009**

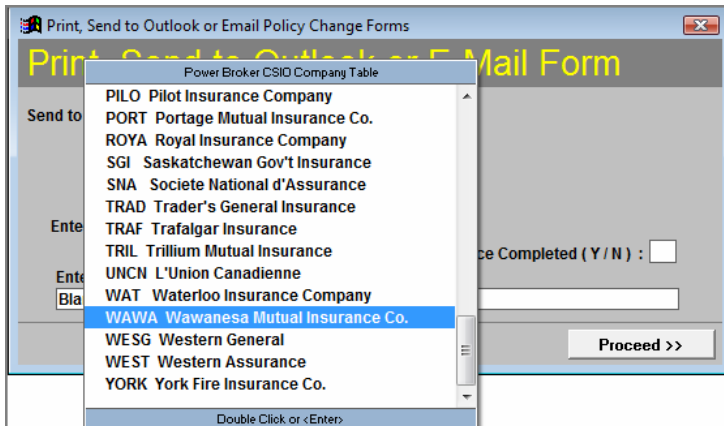
Verify Producer Code : [Dropdown menu] Abeyance Completed (Y / N) :

Enter Customer Form / Memo Database Description : **Blank Letter**

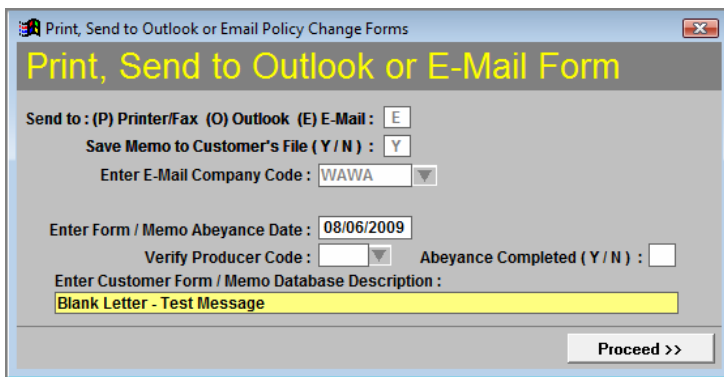
Proceed >>

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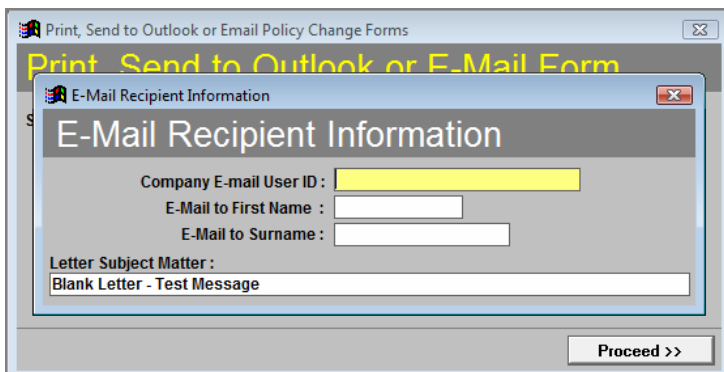
5) Select a company e.g. Wawanesa



6) Type in the subject of the message and click the **Proceed>>** button

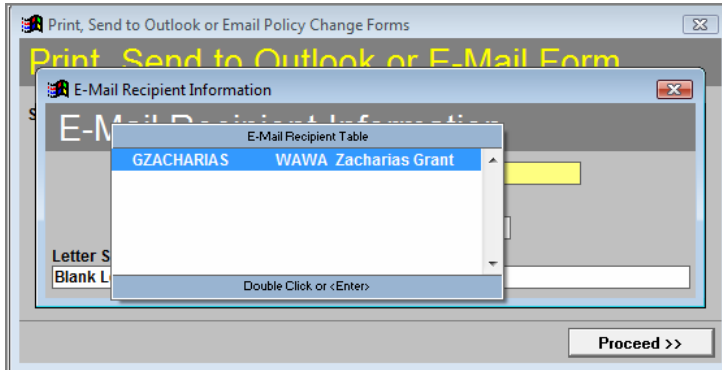


7) Put your cursor in the *Company E-mail User ID* field and press the **<Enter>** key to display a drop down list of the e-mail recipients for that company.

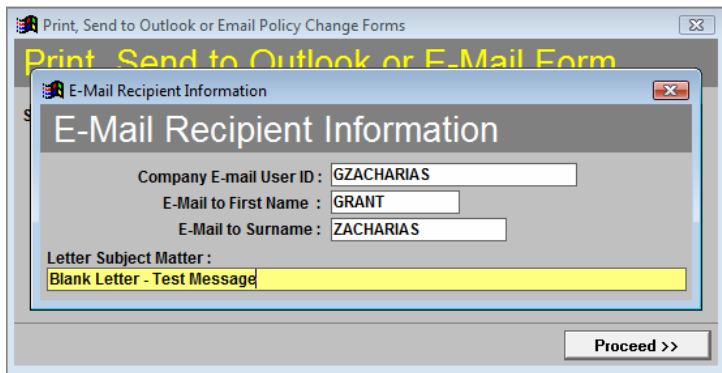


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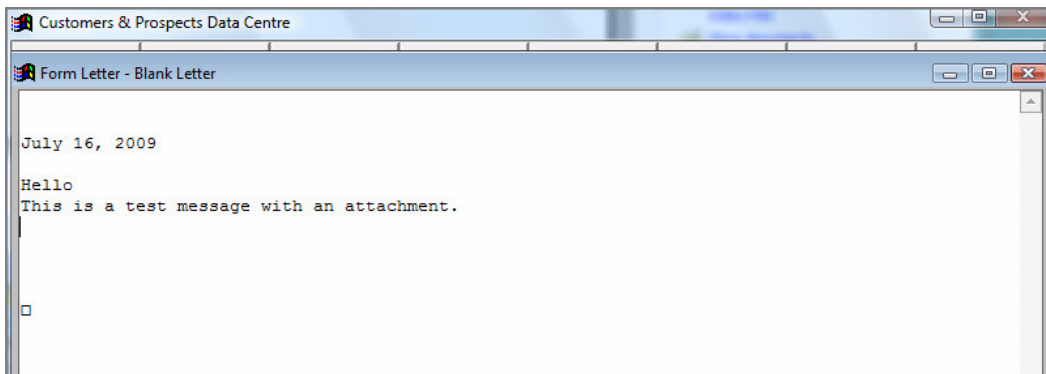
8) Double-click the recipient you want e.g. Grant Zacharias.



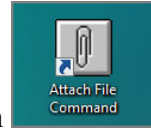
9) Change the **Letter Subject Matter** field if you would like a different subject and press the **<Enter>** key to display the form letter.



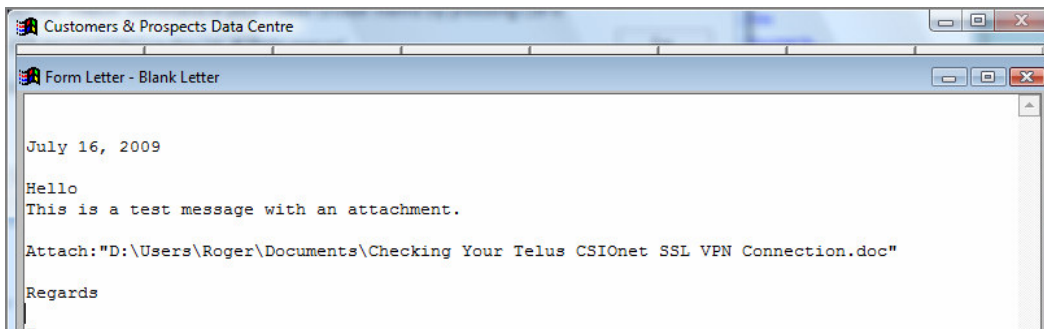
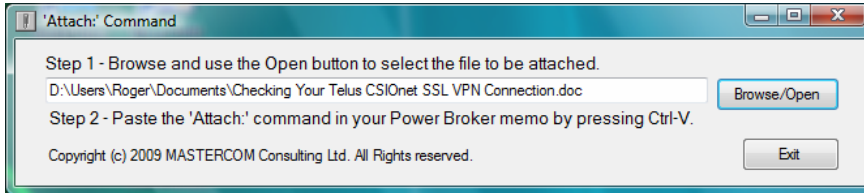
10) Type your message and attach a file.



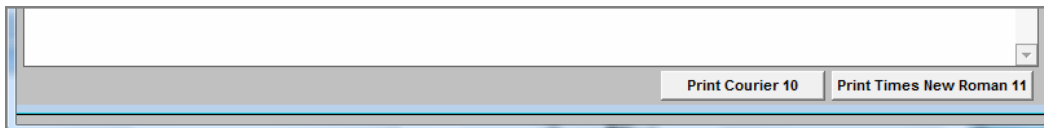
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11) To attach a file select the **Attach File Command** icon on your desktop and do steps 1 & 2.



12) To finish the creation of the e-mail and queue it for sending click the **Print Courier 10** or **Print Times New Roman 11** button and the **OK** button on the **Print** dialog box or otherwise click **Cancel** button.



13) If wish to edit the e-mail or delete your e-mail it after it has been queued for sending, you can do this by selecting the e-mail in the “Outgoing Email to be Uploaded” list and then picking the **Edit Mail** or **Deleted Mail** button.

