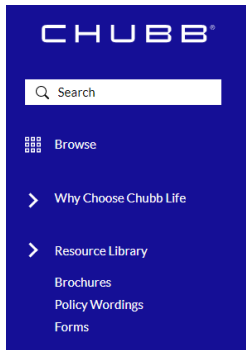



How to send documents by email from Adviser Resources

- Search, browse or navigate through the Resource Library to the documents you need



- Under each section you will see thumbnails of the documents.
- Under each document you will see the 'attach'  symbol

Brochures > Assurance Extra

Email



Assurance Extra Brochure



Assurance Extra Life & Life Income Cover Brochure



Assurance Extra Trauma Cover Brochure



Assurance Extra Complete Disablement Brochure



Assurance Extra Income Cover Brochure



Assurance Extra Mortgage Repayment Cover Brochure




Assurance Extra Redundancy Cover Brochure



Assurance Extra Specific Injury Cover Brochure

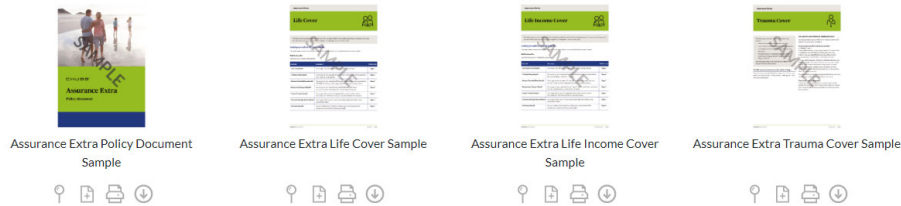


- Hit  on as many documents as you want to send. You can pick documents from different sections (e.g. policy documents, brochures & forms). You will see the number increasing on the email button in the top right of the screen as you do this, indicating how many documents you have attached.
- When you are ready to send, hit the Email button

How to send documents by email from Adviser Resources

Policy Wordings > Assurance Extra

Email (2)



- A form will pop up that you need to complete.
 - Please add the customer's email address in the 'Email' field
 - Add your email address in the 'CC Sender' field
 - Add a subject line and message
- Note you must complete all fields before you can send the email**

Email

customer@gmail.com

CC Sender

adviser@gmail.com

Subject

Assurance Extra Documents

Message

File Edit View Insert Format

↶ ↷ Paragraph B I ...

Hi customer,

Please find attached the documents we discussed. If you have any questions or would like to discuss further please contact me on 09 123 123 or on the email address copied into this email.

Thanks
Adviser

p tiny

Attachments

Assurance Extra Brochure

X

Assurance Extra Policy Document Sample

X


Cancel

Submit

- If you add a document in error, you can remove it by clicking the cross next to it in the email form

How to send documents by email from Adviser Resources

Attachments

Assurance Extra Brochure	
Assurance Extra Policy Document Sample	X

CancelSubmit


- Click submit when you're ready to send and you will see a pop-up delivery confirmation.

Email sent successfully



Note: If it's your first time emailing a customer, it's recommended to follow up to check that your email hasn't gone to their junk mail. You can ask them to mark it as 'not spam' to make sure future emails go to the inbox.

- Emails will show up in the inbox as being from 'Adviser Resources'

Date: Today

 Adviser Resources [EXTERNAL] Assurance Extra Documents

Note: customers cannot reply to this email address and will need to contact you via the email address you have cc'd or other contact details you have provided.

Message  Assurance Extra Brochure.pdf (698 KB)  Assurance Extra Policy Document Sample.pdf (1 MB)

Hi customer,

Please find attached the documents we discussed. If you have any questions or would like to discuss further please contact me on 09 123 123 or on the email address copied into this email.

Thanks

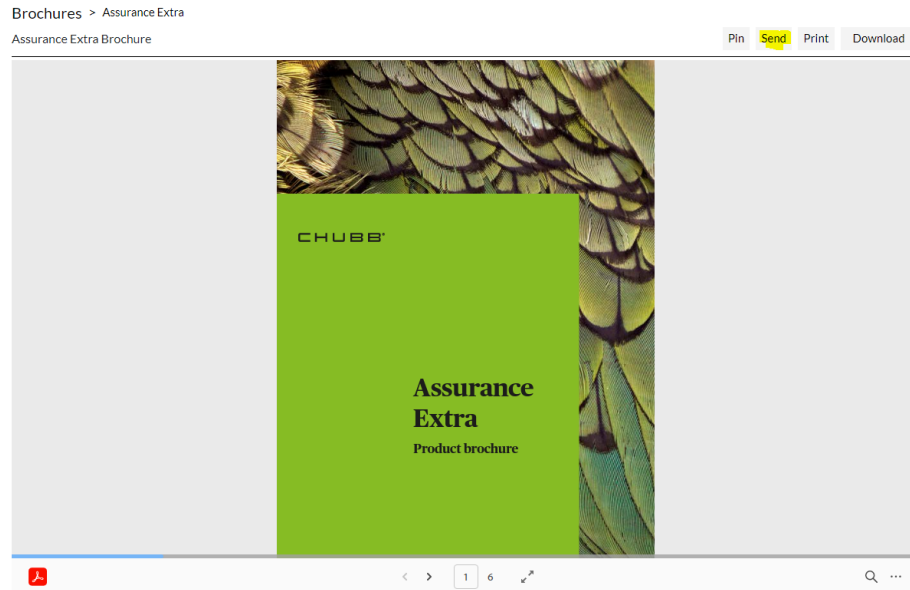
Adviser

Important Information
This email was sent on behalf of the sender named above. If you have received this email in error, or have any queries or would like to respond, please contact that person directly using the cc. email address above or other contact details provided. Please do not reply to this email.

Sending from the file viewer


- If you click a thumbnail to view a file you will notice that it opens up in a document viewer

How to send documents by email from Adviser Resources



- If you click the 'send' button from within the viewer it opens up the same email form. However, you can only send the one document you are viewing via this method. To send multiple documents you need to attach from the thumbnails view.

Sending from your own email address

- If you would like to send documents from your own email address, you will need to download the file to your computer by clicking  and attach to your email in the usual way.