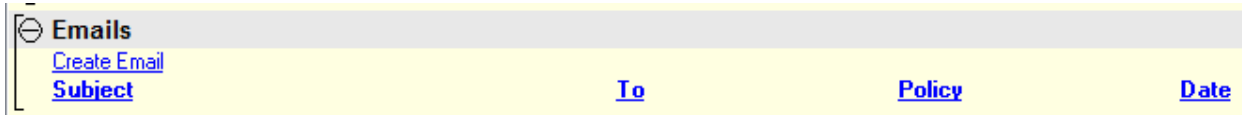


Email

Emails in Newton are recorded on the Basic tab of a Client under the Emails Band. Any email sent or received in Newton will record the body of the email as a permanent searchable activity item. The email band has four columns which can be selected to sort the list below based on the column selected.

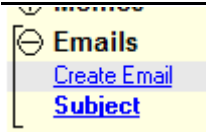


- Subject: Defaults to the subject of the email but can be edited.
- To: The original recipient of the email.
- Policy: Specifies if the email is recorded to a specific policy on the client.
- Date: The original date of the email.

Create a new Email.

An email in Newton can be initiated from a number of areas. The first areas we will discuss are creating an email from the Basic tab, or creating an email from Policy Express.

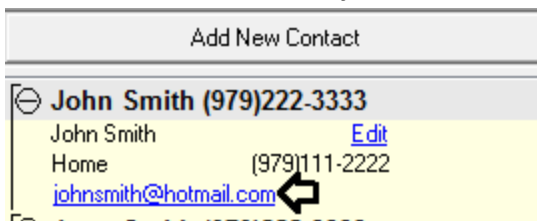
Create a Client Email from the Basic tab.



Select Create Email under the Emails band on the Basic tab of a client.

Emails created from the basic tab will be automatically recorded to the client.

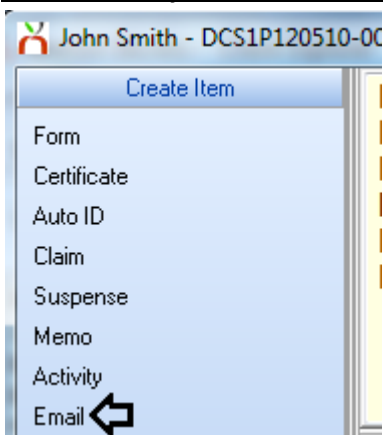
Create a Client Email directly to a contact from the Basic tab.



Select the contact email address from the contact frame on the Basic tab of a client. This will pre-fill the email address in the compose email window.

Emails created from the basic tab contact frame will be automatically recorded to the client.

Create a Policy Email from Policy Express.

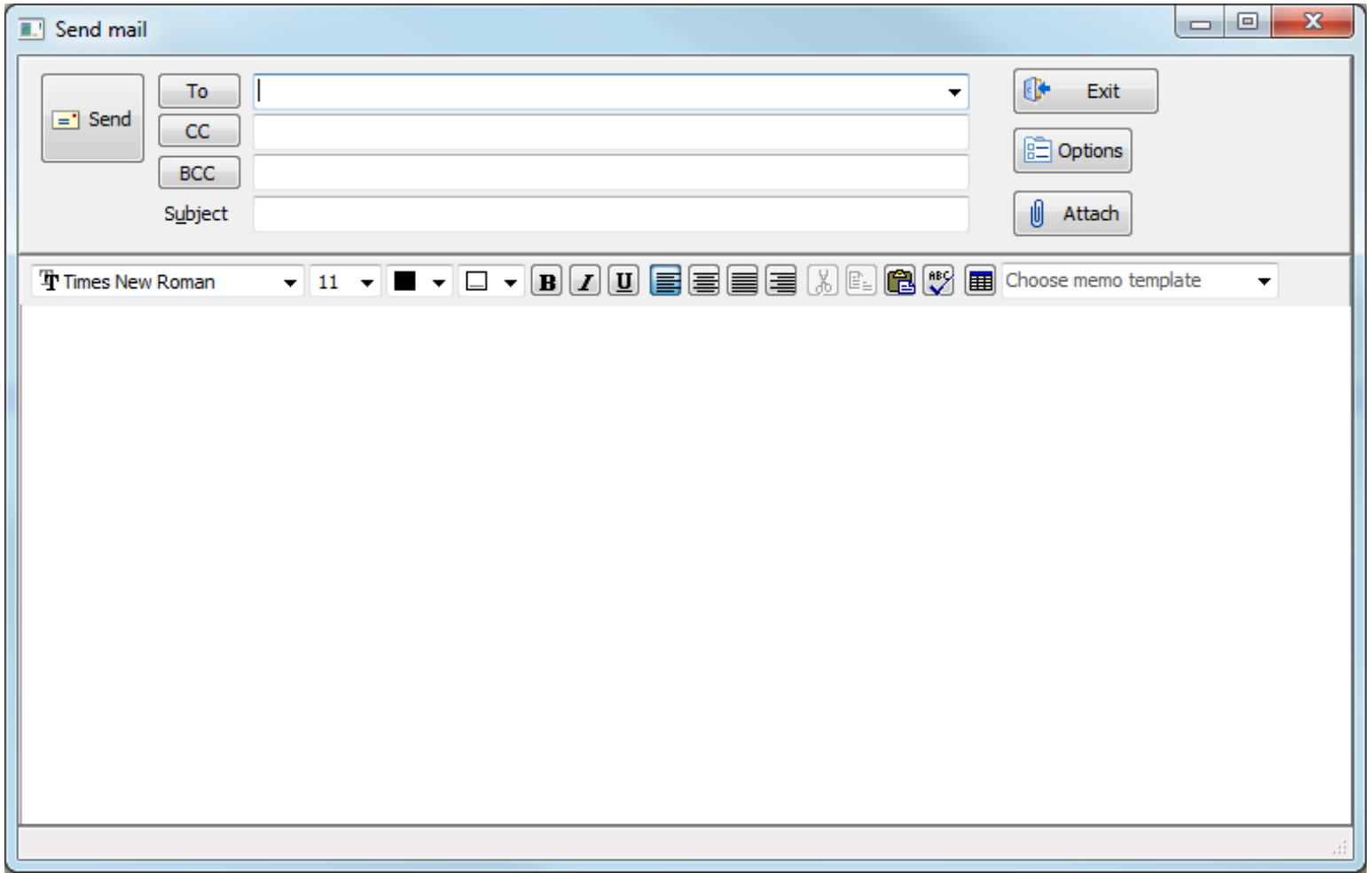


Select the Policy under the Active Policies Band on the basic tab of the client.

Select Create Item -> Email.

Emails created from Policy Express will be automatically recorded to the client and the policy.

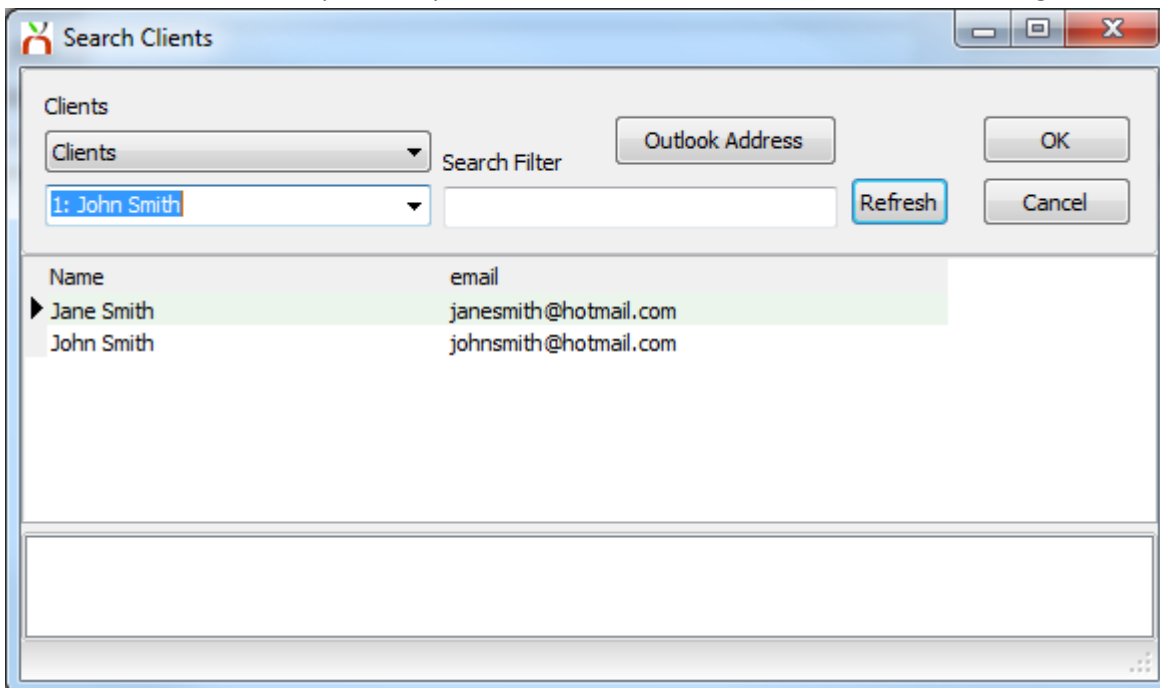
Compose Email Window



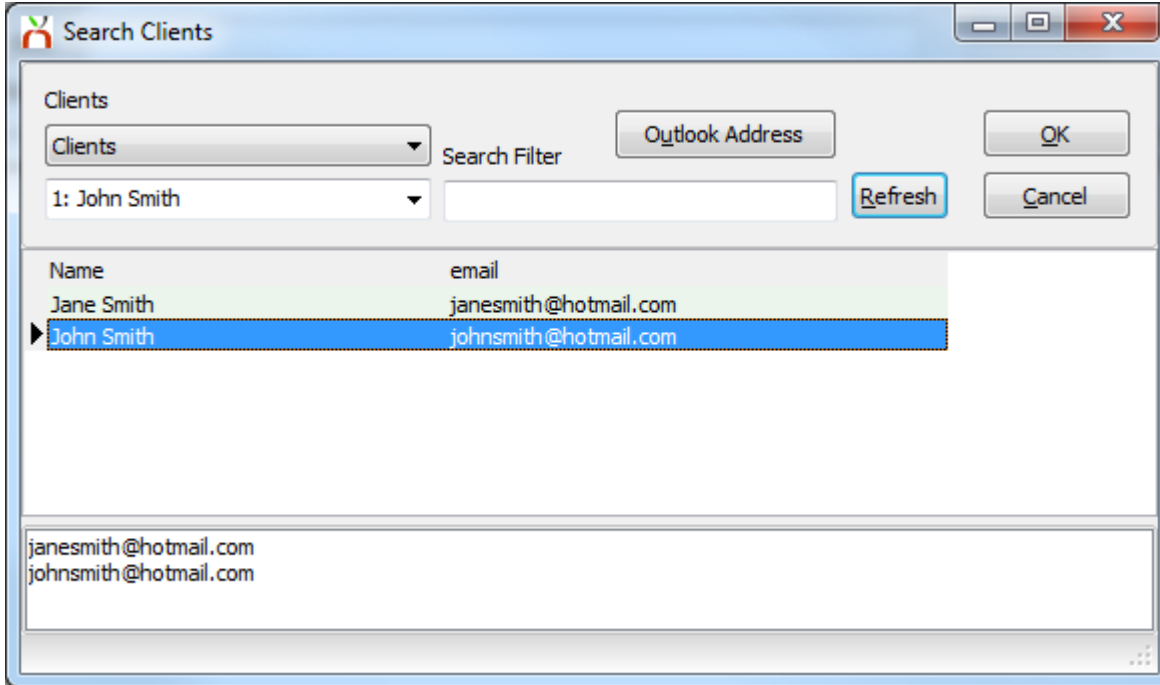
Selecting an email recipient

An email can contain three categories of email recipients; TO, CC, and BCC. Type the email address in one or more of the three fields.

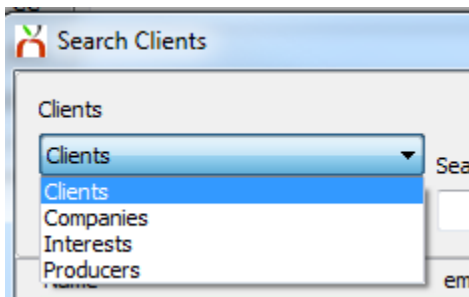
To select an email address previously stored in Newton, Left click one of the three categories.



The Search Clients window will default with the category Clients selected, the current client selected, and all active contacts for the client listed. To select a contact, double click on the name. Multiple names can be selected and will be listed in the bottom white box. Select OK when finished.



Other categories of contacts can be selected by choosing the first drop down box.



Clients: All active contacts for the client selected.

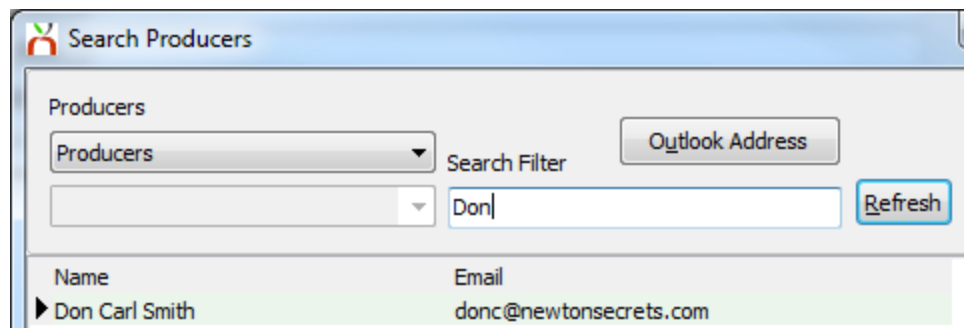
Companies: All active contacts for the company selected. The company code will be pre-selected if the email is started from Policy Express. The selected company can be changed by changing the drop down box below Companies.

Interests: Additional Interests saved to the policy.

Producers: All active producers configured in Profiles -> Producer.

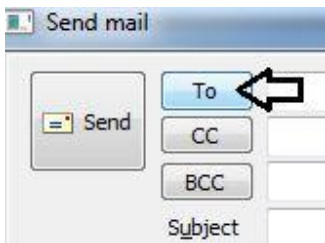
The Search field will filter the results of the category selected.

Example: After select the Producers drop down box, the search string 'Don' was entered. Only producers containing the search string are displayed in the listing below.



Choosing a Contact Stored Externally in Microsoft Outlook

The Outlook Address lookup tool can be accessed after selecting the desired recipient category (To, CC, or BCC) and selecting Outlook Address. This will list all contacts stored in your external Microsoft Outlook Address book.

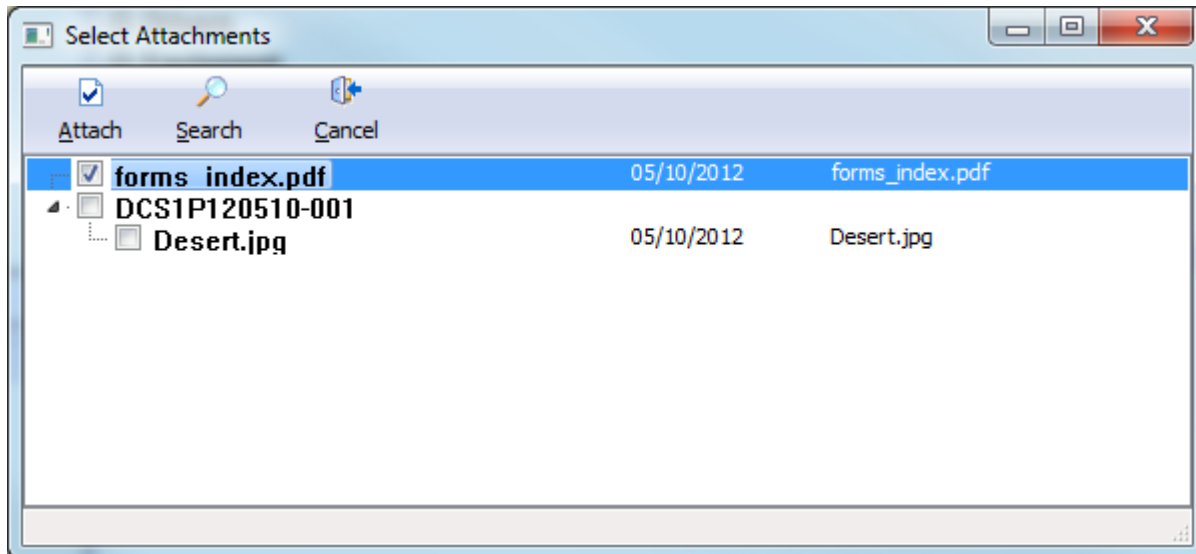


Quick Tip:

The Outlook Address lookup can also be accessed directly by Right Clicking on either TO, CC, or BCC from the compose email window.

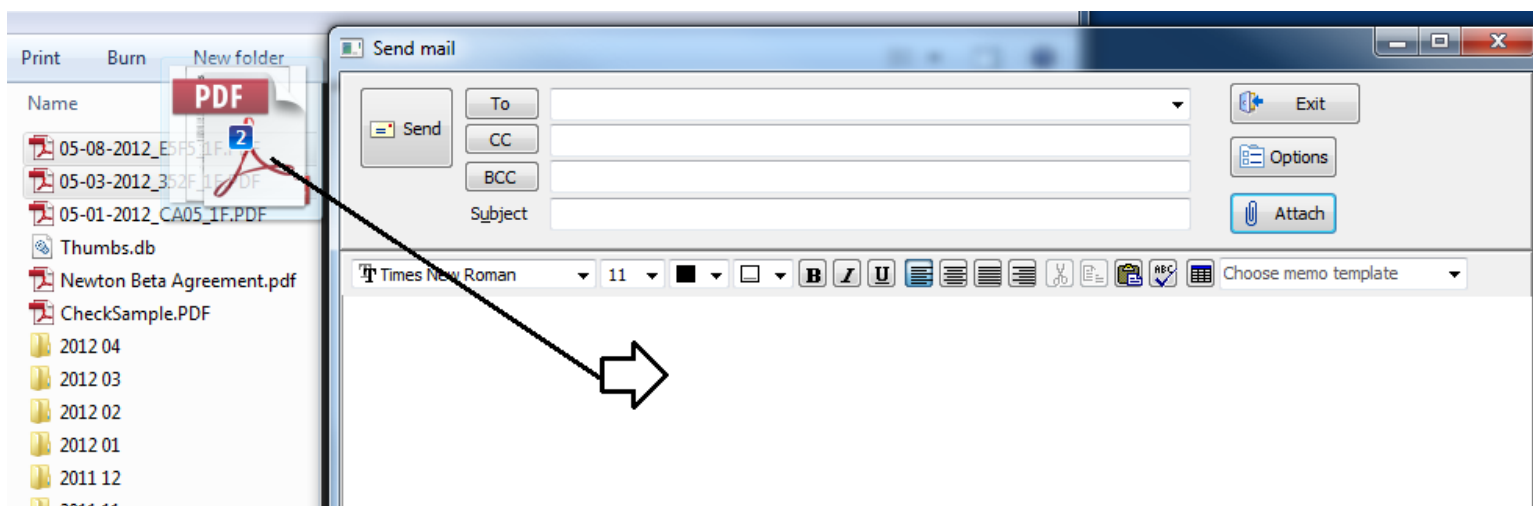
Adding Attachments to an Email


An attachment can be added to an outgoing client or policy email. Select the Attach button to display the select attachments window. Existing client or policy attachments can be chosen by selecting the gray boxes, then selecting Attach.




Select Search to browse your computer for an attachment not previously stored in Newton. Only one attachment can be selected at a time through this Search window.

Attachments can also be dragged and dropped onto the compose email window from outside of the system. Multiple attachments can be dragged and dropped at the same time.



 05-03-2012_352F_1F.PDF

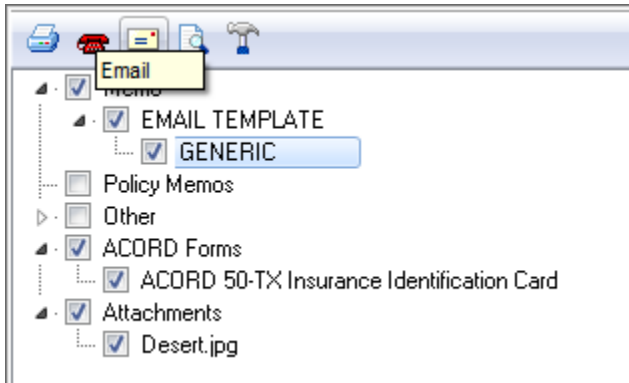
 05-08-2012_E5F5_1F.PDF

Quick Tip:

Any attachment included in an outgoing email will be automatically stored within Newton for direct access.

Email ACORD forms Memos and Attachments

A single email containing ACORD forms, memo templates and multiple policy attachments can be generated through batch print. Select the policy under the Active Policies band on the client Basic tab. Select Automated Procedures -> Batch Print.



Batch print will generate a single .PDF attachment of all memos and ACORD forms selected. Multiple forms and memos can be selected for a single batch.

If a memo is selected that contains merge codes, the merge codes will be replaced with client and policy specific information automatically.

Any policy attachments selected will be included as an additional attachment. Multiple attachments can be selected along with the ACORD forms and memos.

Entering the email message body

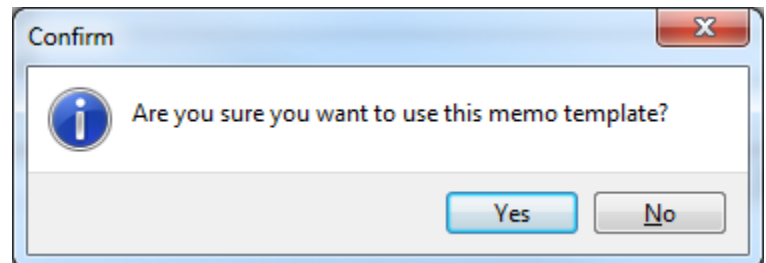
The message body content can be entered manually, or can be prefilled from an existing memo template.



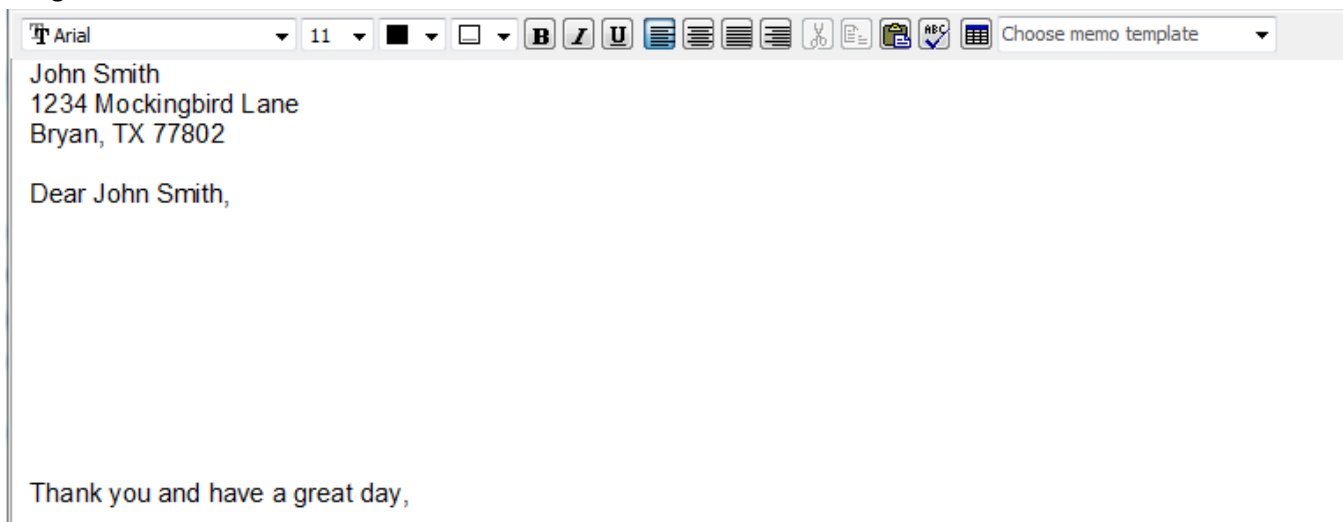
To select a memo template, select the Choose Memo template drop down box and select the desired memo. Memos are organized by Category, then Name.

When a memo template is selected, the information will be automatically placed as the body of the email, with any Merge Codes converted to data from the client file automatically.

Select Yes to confirm.

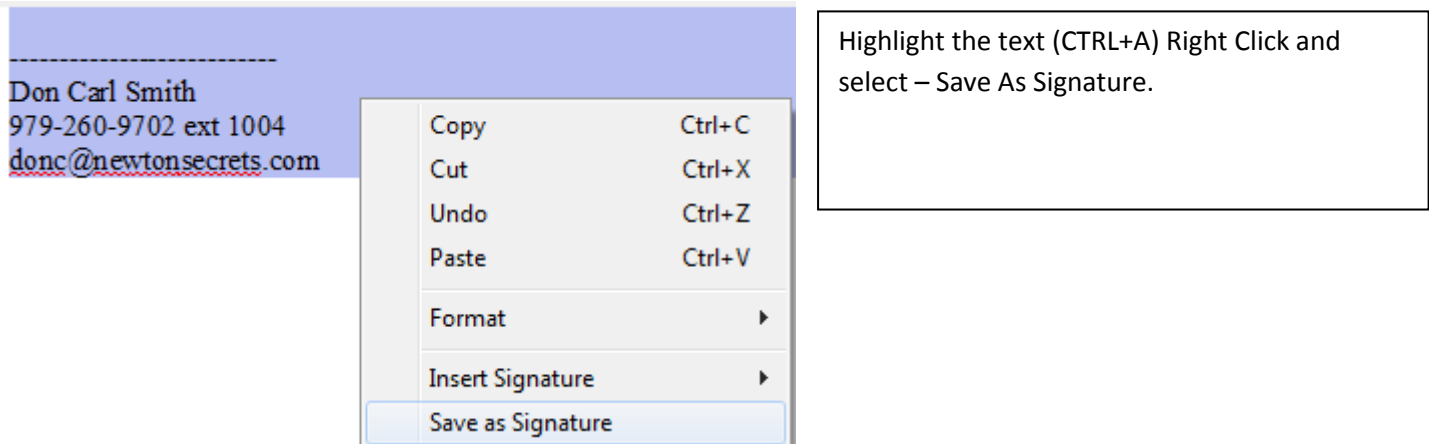


Merged information



Inserting an Email Signature

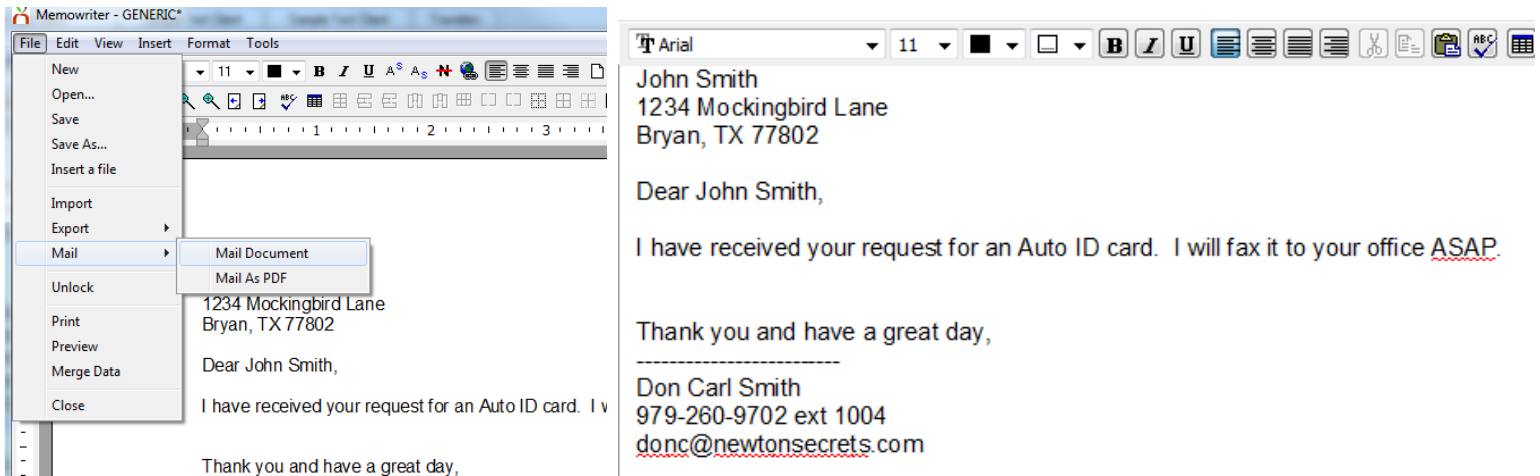
The Email Signature for the current operator will be automatically placed as the footer of an email when it is started. To create an email signature, enter the desired signature information into the compose email window.



After merging a memo template, Right Click and select Insert Signature -> Default.

Quick Tip: >>>

If a memo document is open and completed, select File -> Mail -> Mail Document to send the completed memo as the body of an email.



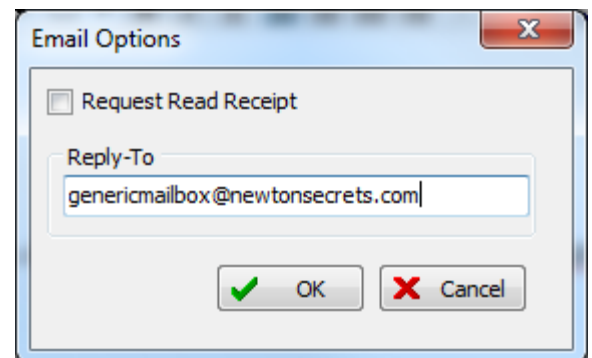
Compose Email Options

Selection Options to view the extended compose email options.

Select Request Read Receipt to include a request for a Read Receipt.

Enter a Reply-To email address to change the email address that will pre-fill when the recipient selects reply. This is only necessary if the desired email address is different than the sender's.

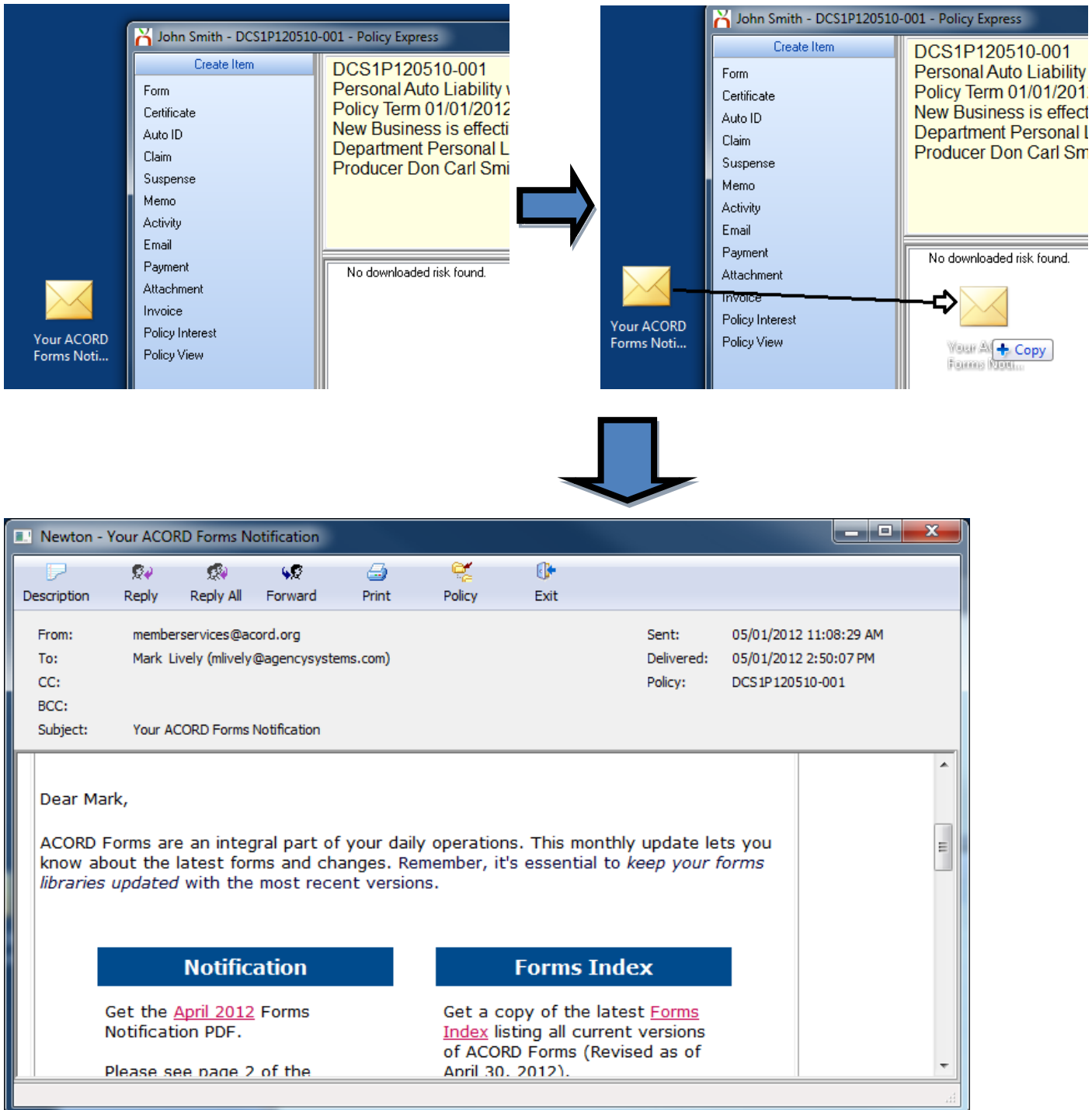
This can be specified as default in the producer profile.



Attach Received Email

To attach an email received in Microsoft Outlook, simply drag and drop the email onto Newton. The emails can be dragged directly from Microsoft Outlook, or from their saved location on your computer. The emails can be attached to a Client, Policy, or Company. After dragging and dropping an email, the converted email will open.

Dragging and Dropping an Email to Policy Express



An email attached into Newton will be converted and listed under the Emails band on the client Basic tab. The content in the email will be stored as a permanent non-editable searchable activity item, and any attachments will be stored within Newton automatically.

Quick Tip:

Any previously attached Microsoft Outlook emails from prior versions of Newton will be automatically converted as an Email when opened.

View, Reply, Forward, or Edit an Email.

To open an existing email, select the email from the Emails band on the Basic tab of a client.

Emails			
Create Email			
Subject	To	Policy	Date
Your ACORD Forms Notification	Mark Lively (mlively@agencyssystem.com)	DCS1P120510-001	05/01/2012 11:08:29 AM



The screenshot shows the Newton email client window titled "Newton - Your ACORD Forms Notification". The interface includes a menu bar with options: Description, Reply, Reply All, Forward, Print, Policy, and Exit. The email header shows the following details:

From:	memberservices@acord.org	Sent:	05/01/2012 11:08:29 AM
To:	Mark Lively (mlively@agencyssystem.com)	Delivered:	05/01/2012 2:50:07 PM
CC:		Policy:	DCS1P120510-001
BCC:			
Subject:	Your ACORD Forms Notification		

The main body of the email contains the following text:

Dear Mark,

ACORD Forms are an integral part of your daily operations. This monthly update lets you know about the latest forms and changes. Remember, it's essential to *keep your forms libraries updated* with the most recent versions.

Below the text are two blue buttons: "Notification" and "Forms Index".

Under "Notification": Get the [April 2012](#) Forms Notification PDF.

Under "Forms Index": Get a copy of the latest [Forms Index](#) listing all current versions of ACORD Forms (Revised as of ...)

Quick Tip:

To view only emails for a specific policy, select the policy number listed under Active Policies on the client Basic tab. Select View Existing Item -> Emails.

Reply or Forward an Email

Select Reply to send an email to the original sender. Select Reply all to send an email to all recipients included in the original message.

Select Forward to forward the email to a new recipient.

The original message will be listed below the body of the new email text. When the message is sent, the outgoing email will be automatically recorded as a client email, or an email to a specific policy.

Quick Tip:

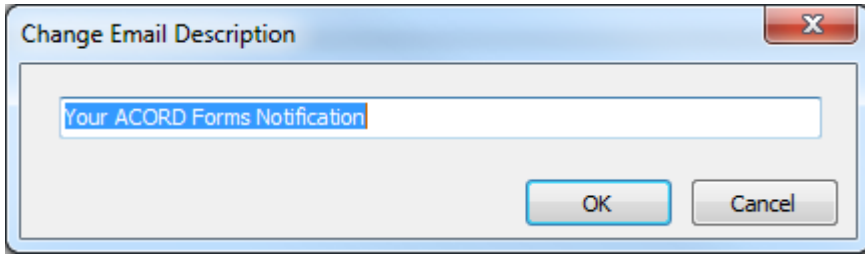
After attaching an email through drag and drop, simply select reply to respond quickly and have the response recorded automatically in Newton.

Delete an Email

To remove an email from a client, Right Click in the area to the right of the description and select Delete. The operator must have a security access level of 9 to delete emails.

Edit the Description of an Email

Open the email from the Emails band on the client Basic tab. Select Description and enter the new description text.



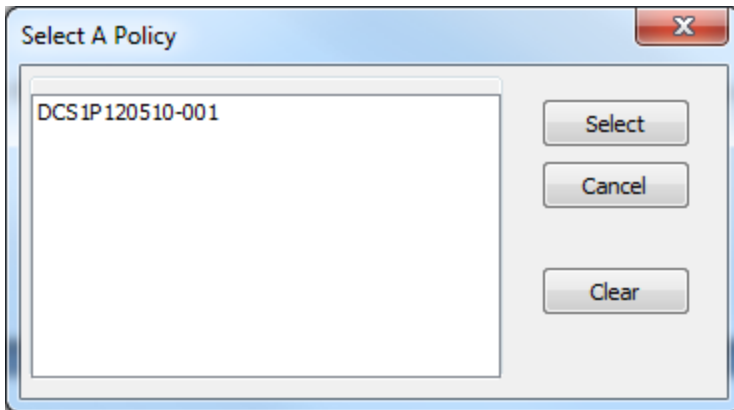
To change the description without opening the email, Right Click in the area to the right of the description and select Edit Description. Enter the new Description and select Ok.

Quick Tip:

An Email description can be reverted to the original text by removing the Description and selecting OK.

Move an Existing Email to / From a Policy

To change or remove an email specific to a policy open the email from the Emails band on the client Basic tab and select the Policy button.



Highlight the desired policy from the list and choose Select to assign the email to a policy.

Choose Clear to remove a specific policy number from the email.

The email will still be listed as a client email if the policy number is removed.