## Sending a Message

You can manually send custom, template-based messages with attachments via the Messages tab.

- 1. Click New, and select a message type from the list provided:
  - Expiry: send an expiry notification manually.
  - Policy Requirements: send a request for new policy documents (attaches policy requirements document)
  - Non Compliance: send a non-compliance notification.
  - General: send a custom message that does not use a template.

New - Mark as Read	🖾 Reply	New Note/Remind
Expiry		Subject
Policy Requirements	Systems	Review for non-co
Non Compliance	ıs Syste	Review attachm
General	com	RE: COI Expiry No
	Systems	COI Expiry Notifica

- The New Message window will open. By default, the COI contact listed for the vendor or tenant is autofilled. You can edit the To and Cc fields as desired; please note that to enter multiple email addresses into the To or Cc fields, additional email addresses must be separated with semicolons (;).
- The Subject field is auto-filled based on the template type you selected (or blank if the General message type was used). You can edit this field as necessary.
- The Message field is also auto-filled based on the template type you selected (or blank if the General message type was used). You can edit this field as necessary.
- 5. The default settings for what attachments will be sent are based on your attachment settings, defined in the Attachments section of the <u>Policy & Compliance tab</u> as well as in your COI Expiry Notifications options in the <u>Messages tab</u>. You can override these defaults by placing or removing the checkmarks beside each document listed.
- 6. Click Send.

pv@amelevator.com
Please separate email addresses with semicolons
Please separate email addresses with semicolons
COI Policy Requirements for A & M Elevator Company Inc.
In order to perform work at the following properties, a valid Certificate of Insurance (COI) in must be provide by you or your agent:
- Hilview Towers
The attached document outlines the policy requirements with which your Certificate of Insurance must comply. Furthermore, the certificate must name all of the following as "Additional Insured":
Please contact us with any questions or concerns regardings this matter.
Sincerely,
Peter Parker Phone: 416-385-8550
COLpdf 🕑 Insurance.doc