

Subject: Accessing Client Emails and Faxes	Product: Customer Loyalty Group	Approved on:
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Purpose:

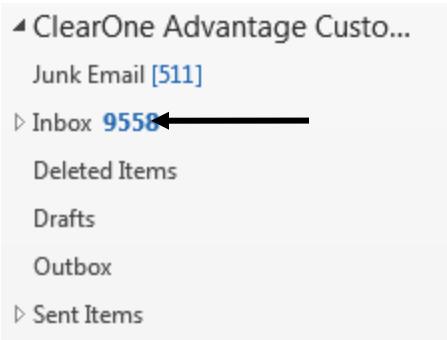
Accessing emails and faxes through Microsoft Outlook from client's that have not yet been processed.

Policy:

Client calls in referring to an email or fax they sent that is not attached in Request File or Client File.

Procedure:

1. Ask client when email/fax was sent
2. Open *Microsoft Outlook*
3. As pictured below, click on the Inbox subfolder under ClearOne Advantage Customer Service



4. As pictured below, scroll to the approximate date and time that the client sent email/fax or use the search by current folder option at the top of your outlook

The screenshot shows the Microsoft Outlook inbox with three messages listed:

- Sam Zak, Re: Welcome call, 8:00 AM, Hello, is there any chance
- MetroFax, MetroFax message from "...", 7:59 AM, You have a new fax!
- MetroFax, MetroFax message from "...", 7:48 AM, You have a new fax!

To the right, the ribbon menu is visible with options like Archive, Reply, Forward, All, Meeting, Respond, and Quick Steps. The search bar at the top also shows 'carol barker'.

5. As pictured below, if the client can provide all or part of the documents sent:
 - a. Match fax with the sender information



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- b. Verify the email that was used to send documents

 byoung2@san.rr.com | Customer Service; byoung2@san.rr.com ▾
RE: Summons regarding American Express Account

9:07 AM

6. If email/fax is not found, advise client to resend documents
7. If email/fax was found, attach documents to the *Request File* or *Client File*

Exceptions:

None

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