SAVING EMAILS
In PolicyPro by Sapiens

HOW TO SAVE EMAILS – TO UPLOAD INTO SAPIENS

You can save emails in several different formats, which can then be uploaded into Sapiens.
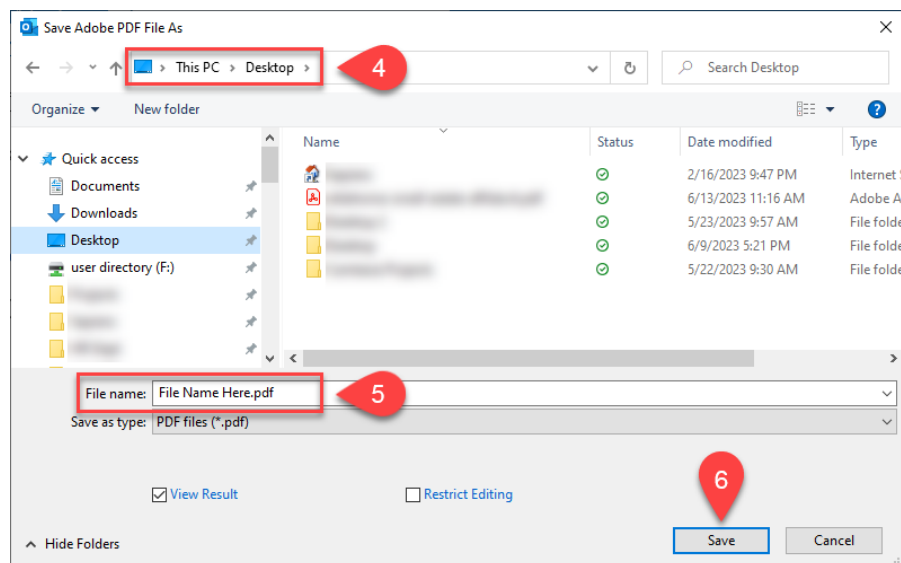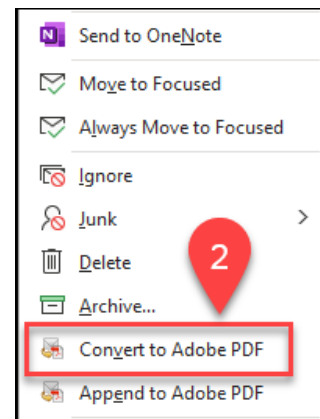
The options in my email client are:

- Text Only
- Outlook Template
- Outlook Message Format
- Outlook Message Format – Unicode
- HTML

However, the easiest method is to **Convert to PDF**.

CONVERT TO PDF:

1. **Right Click** on the **Email** you want to save.
2. Select "**Convert to Adobe PDF**"
3. The "**Save Adobe PDF File As**" dialog box will open
4. Select where you want to save the file
5. Enter a **File Name**
6. Next, click **Save**
7. Finally, upload your file to Sapiens

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SAVING EMAILS AS DIFFERENT FILE TYPES:

1. **Open** the Email

2. Click on "**File**"

3. Select "**Save A**s"

4. The "**Save As**" dialog box will open

5. Choose where to save the file

6. Enter a **File Name**

7. Click the "**Save as type**" drop-down

8. Choose a **File Type** to save the email

9. Next, click "**Save**"

10. Finally, upload your file to Sapiens