



## SCENARIOS

AVYST eForms Wizard Test Cases V1.1

### ABSTRACT

This document contains sample scenarios for the Early Adopter Program of the AVYST eForms Wizard.

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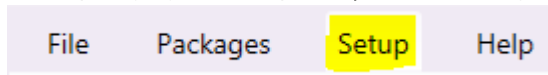
# 1 SETUP

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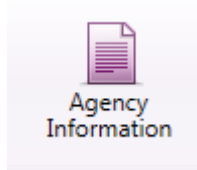
## 1.1 AGENCY INFORMATION

### 1.1.1 Add an Agency

1.1.1.1 Add agency by selecting **'Setup'** from the top left of the screen.

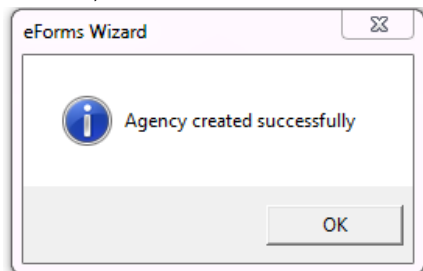


1.1.1.2 Select **'Agency Information'**

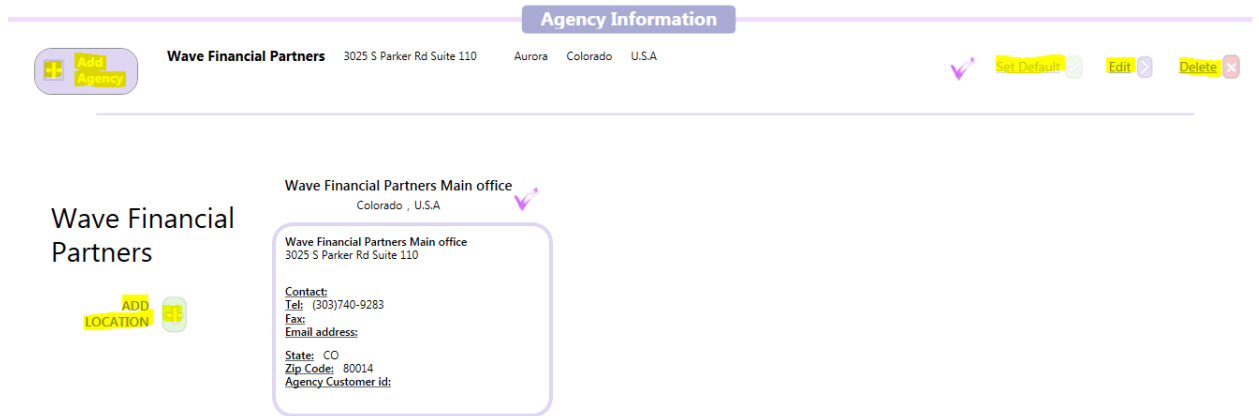


1.1.1.3 Complete all mandatory fields on Agency Information screen and select **'Submit'**

1.1.1.4 After selecting 'Submit' you will receive popup notification that agency was successfully created, click **'OK'**



- 1.1.1.5 Your 'Agency Information' will then display with option to **'Add Agency'** or **'Add Location'** in addition to your main office. Options will also display to **'Set Default'**, **'Edit'** or **'Delete'**



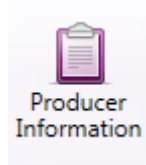
## 1.2 PRODUCER INFORMATION

### 1.2.1 Add Producer Information

- 1.2.1.1 Add 'Producer Information' by selecting **'Setup'** from the top left of the screen.



- 1.2.1.2 Select **'Producer Information'**



- 1.2.1.3 Select **'Add Producer'**, complete all mandatory fields and select **'Submit'**. Additional Producers can be added with the same process.

Producer Name	Agency Name	National Producer Number	State Specific
---------------	-------------	--------------------------	----------------

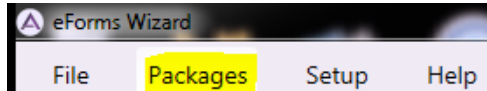
## 2 PACKAGES

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### 2.1 NEW PACKAGE

#### 2.1.1 Add a new package

2.1.1.1 Add a new package by selecting **'Packages'** from the top left of the screen.



2.1.1.2 Select **'+New Package'**



2.1.1.3 A pop-up screen will appear to 'Please Enter New Package Name' and select 'LOB Type'

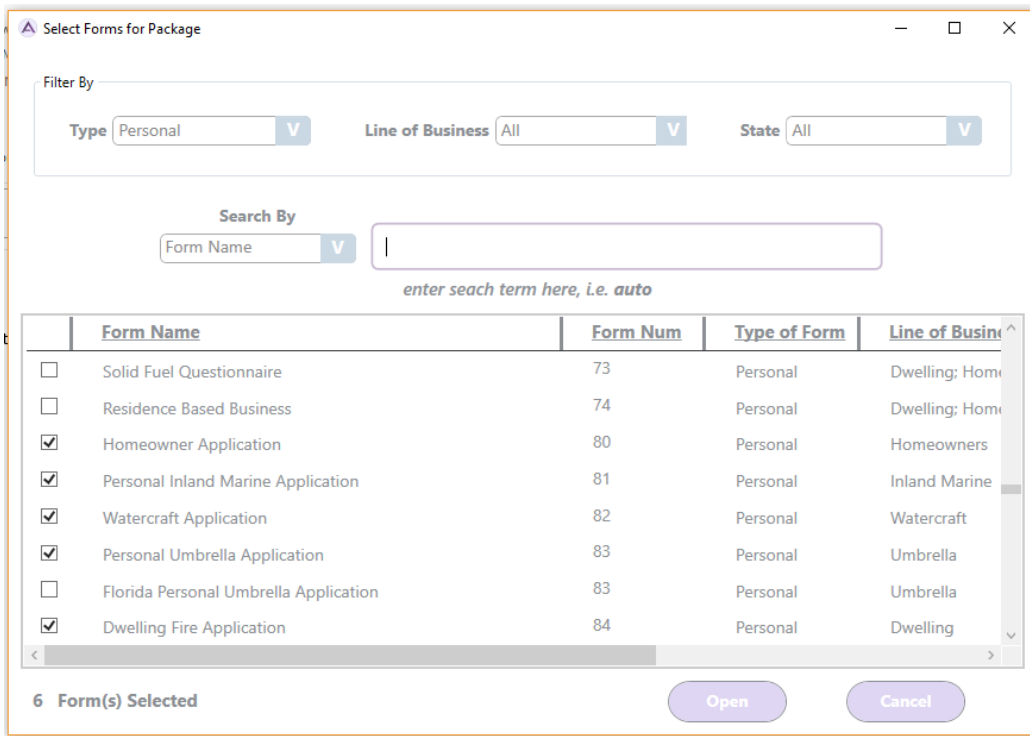
- Type **'Advanced PL'**
- Select **'Personal'**
- Select **'Create'**

 A screenshot of a dialog box titled 'Create Package'. The dialog contains the text 'Please Enter New Package Name'. Below this is a text input field with 'Advanced PL' entered. Underneath, there are two radio buttons for 'LOB Type': 'Personal' (which is selected) and 'Commercial'. At the bottom of the dialog are two buttons: 'Create' and 'Cancel'.

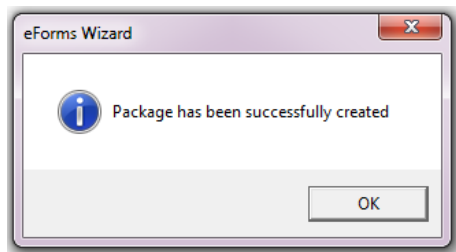
2.1.1.4 A pop-up screen will appear to "Select Forms for Package"

- Filter By:
  - Type; i.e.: **'Personal'**
  - Line of Business: i.e.: **'All'**
  - State: i.e.: **'All'**

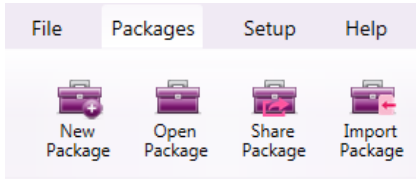
- Use the **Search By** field to search and select (check the box) the 6 following applications from 'Form Name' for the Advanced PL Package:
  - *Homeowner Application*
  - *Colorado Personal Automobile Application*
  - *Personal Umbrella Application*
  - *Personal Inland Marine Application*
  - *Watercraft Application*
  - *Dwelling Fire Application*
  
- Select **'Open'**



2.1.1.5 After selecting 'Open' you will receive popup notification that package was successfully created, click **'OK'**.



## 2.1.2 Open, Share or Import Package

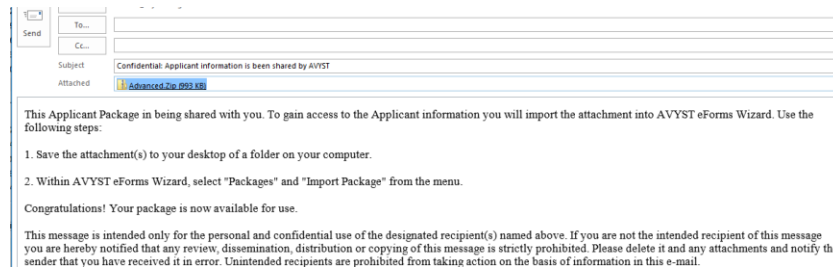


### 2.1.2.1 'Open Package'

- A client must be selected to 'Open Package' under 'Packages'
- Double click on the Personal Lines folder
- Select the Advanced PL package just created, click open

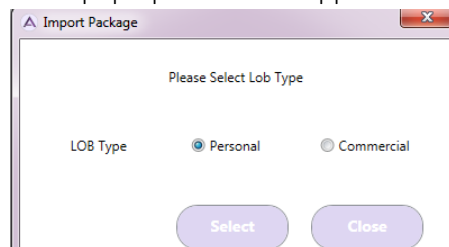
### 2.1.2.2 'Share Package'

- Select the package you want to share and select +Share to email
- Steps automatically included in the email of how to import the package into another users AVYST eForms Wizard



### 2.1.2.3 'Import Package'

- A pop-up screen will appear to Select LOB Type



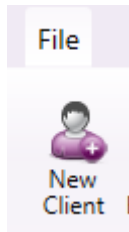


### 3 PERSONAL LINES SCENARIOS

#### 3.1 SCENARIO 1: HIGH NET WORTH PACKAGE

##### 3.1.1 Add a new client

3.1.1.1 Add a new client/prospect by selecting **+New Client** from the top left area of the screen under 'File'.



3.1.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.

- Select 'Personal' for a personal lines applicant
- Select 'Commercial' for a commercial lines applicant



3.1.1.3 Choose **'Personal'** and enter all mandatory fields on New Client Info screen:

 A screenshot of the 'New Client Info' form. The 'Personal' tab is selected. The form contains the following fields:
 

- First Name: John
- Middle Initials: R
- Last Name: Jones
- Street Address 1: 198 W. Elm Street
- Street Address 2: (empty)
- Unit Number: (empty)
- City: Denver
- State: Colorado
- Zip Code: 80239
- Country: U.S.A
- Phone: (303)999-2563
- Fax: (empty)
- Email Address: JRJones69@gmail.com

 To the right of the form is a 'Choose A Package' section with a scrollable list:
 

- Advanced PL
- Advanced (checked with a green checkmark)
- Advanced2
- Basic
- Dwelling Fire Monoline
- Home, Auto Complex wit
- Home, Auto, Marine & U
- Home, Auto, Umbrella
- Home, Rental, Auto & Un

 At the bottom right of the package list are 'Create' and 'Cancel' buttons.

3.1.1.4 Choose the appropriate package if you have one and select 'Create'. For this client **select 'Advanced' from Choose a Package**; note that if you do not want to use an existing package you can choose not to pick a package and just **select 'Create'** and will then be able to choose appropriate ACORD forms.

3.1.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.

- When more than 4 applications are included you can use the right and left arrow keys (< & >) on each side of the application display to display other selected applications.

John R Jones

John R Jones  
198 W Elm Street  
Denver, CO 80239  
Phone: (303)999-2563  
E-mail: JRJones69@gmail.com

Watercraft Application Personal Umbrella Application Dwelling Fire Application Colorado Personal Automobile Application X

Recent Items...  
Dwelling Fire Application  
Colorado Personal Autom  
Personal Umbrella Applicat  
Watercraft Application  
Personal Inland Marine App

Recent Clients...  
John R Jones

**ACORD** COLORADO PERSONAL AUTO APPLICATION

DATE (MM/CO/YYYY)

AGENCY: Wave Financial Partners  
3025 S Parker Rd Suite 110  
Aurora CO 80014

APPLICANT'S NAME AND MAILING ADDRESS (include county & ZIP +4): John R Jones  
198 W Elm Street  
Denver U.S.A CO 80239

TELEPHONE NUMBER: (303)999-2563

CONTACT NAME: [Blank]  
PHONE: (303)740-9283  
FAX: [Blank]  
JALC No: [Blank]  
E-MAIL ADDRESS: [Blank]  
CODE: [Blank] SUBCODE: [Blank]  
AGENCY CUSTOMER ID: [Blank]

CARRIER: [Blank] NAC CODE: [Blank]

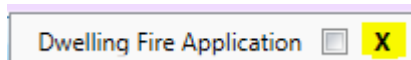
PLAN: [Blank] POLICY #: [Blank]  
ACCT #: [Blank]

EFFECTIVE DATE: [Blank] EXPIRATION DATE: [Blank]  
DIRECT: [Blank] AGENCY: [Blank] MAIL POLICY TO AGENT: [Blank] MAIL POLICY TO APP: [Blank] PAYMENT PLAN: [Blank]

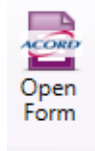
RESIDENCE: CURRENT RESIDENCE IS [Blank] OWNED: [Blank] RENTED: [Blank]  
PREV AT ACOR CURR: [Blank] PREVIOUS STREET ADDRESS (if less than 3 years): [Blank] CITY: [Blank] STATE: [Blank] ZIP + 4: [Blank]

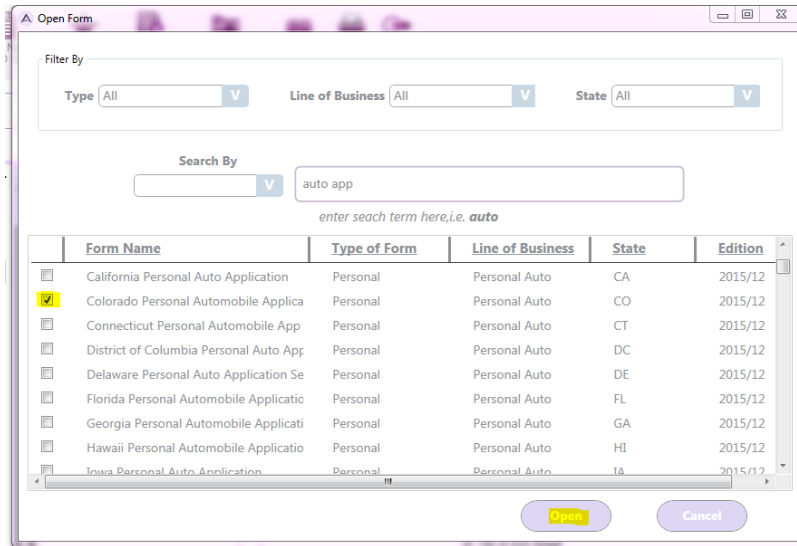
ADDITIONAL GARAGING ADDRESS(ES)  
LOC: [Blank] STREET: [Blank] CITY: [Blank] COUNTY: [Blank] STATE: [Blank] ZIP + 4: [Blank]

3.1.1.6 To remove an application from the selected package select the 'X' from that particular application.



3.1.1.7 To add an application from the selected package select 'Open Form' from the top left of the screen and a popup page will appear to select the additional forms by checking the boxes to the left of the form name and select 'Open'.

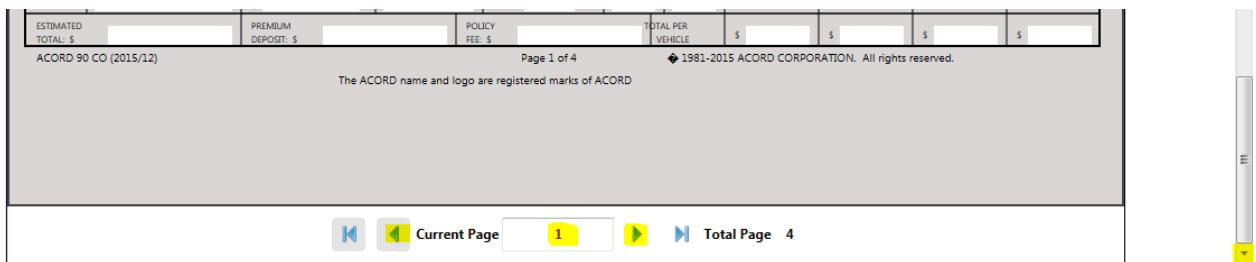




- 3.1.1.8 Use the paging buttons at the top or bottom of each application or enter the page number at the bottom of each application to move forward or back.
- The selected page will be in bold on the top of each application where total number of pages is displayed.



- As you complete each field you can use your tabbing button to move to the next field and screen will automatically scroll down or you can use the scroll from the right side of the application.
- The selected page will be displayed at the bottom of each application next to 'Current Page'



- 3.1.1.9 Information that is input and used in different selected package application(s) will automatically pre-fill. Complete auto application vehicle and driver information and when you access the umbrella application the information will already be pre-filled.
- Likewise, when either of the applications is updated system will also automatically update the other line of business.

- o If only 3 vehicles were added to the auto application initially and an additional auto was manually added to the umbrella application, vehicle 4 would pre-fill to the auto application.

Auto Application Manual Input:

VEHICLE DESCRIPTION / USE						TOTAL NUMBER OF VEHICLES IN HOUSEHOLD:					
VEH	LOC	YEAR	MAKE	MODEL	BODY TYPE	VIN	REG STATE	HP/CC	DATE LEASED	DATE PURCH	NEW/USED
1		2007	Ford	Mustang		1FAFP12WA4E123456	CO				
2		2016	Ford	F150		2FPXZ65U4A6578946	CO				
3		2011	Chevy	Malibu		4EPU356KDPE125879	CO				

Watercraft Application   
  Personal Umbrella Application   
  Dwelling Fire Application   
  Colorado Personal Automobile Application   

1 2 3 4

AGENCY CUSTOMER ID: \_\_\_\_\_

RESIDENT & DRIVER INFORMATION [List all residents & dependents (licensed or not) and regular operators]

#	FIRST NAME	MIDDLE NAME	LAST NAME	SEX	MARK	REL TO APPLIC	DATE OF BIRTH
	John	R	Jones	M	M	I	06/04/1966
	Brenda	L	Jones	F	M	S	08/16/1968
	Matthew	J	Jones	M	M	C	10/30/2000

Umbrella Application Pre-fill from auto application input:

Recent Items...

- Dwelling Fire Application
- Colorado Personal Autom
- Personal Umbrella Applicat**
- Watercraft Application
- Personal Inland Marine App

Recent Clients...

- John R Jones

**AUTOMOBILES AND RECREATIONAL VEHICLES**

LIST ALL AUTOS OWNED, LEASED OR FURNISHED FOR REGULAR USE AND MOTORCYCLES, SNOWMOBILES, DUNE BUGGIES, MINIBIKES, etc.

#	YEAR	MAKE	MODEL	BODY TYPE
	2007	Ford	Mustang	
	2016	Ford	F150	
	2011	Chevy	Malibu	

**WATERCRAFT**

LIST ALL WATERCRAFT OWNED, LEASED, CHARTERED OR FURNISHED FOR REGULAR USE

#	YEAR	MANUFACTURER	MODEL	LENGTH	HORSE POWER	MAX SPEED

POWER  INBOARD  INBOARD/OUTBOARD  SAIL   
 WATERS NAVIGATED  GREAT LAKES  PACIFIC  GULF OF MEXICO  
 ATLANTIC  INLAND WATERWAYS  SEVERS

POWER  INBOARD  INBOARD/OUTBOARD  SAIL   
 WATERS NAVIGATED  GREAT LAKES  PACIFIC  GULF OF MEXICO  
 ATLANTIC  INLAND WATERWAYS  SEVERS

POWER  INBOARD  INBOARD/OUTBOARD  SAIL   
 WATERS NAVIGATED  GREAT LAKES  PACIFIC  GULF OF MEXICO  
 ATLANTIC  INLAND WATERWAYS  SEVERS

**OPERATORS**

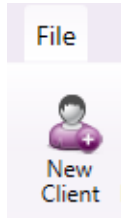
LIST ALL MEMBERS OF HOUSEHOLD AND ALL OPERATORS OF VEHICLES / WATERCRAFT AS REQUIRED BY COMPANY

#	FIRST NAME	MIDDLE NAME	LAST NAME	SEX	MARK	DATE OF BIRTH
	John	R	Jones	M	M	06/04/1966
	Brenda	L	Jones	F	M	08/16/1968
	Matthew	J	Jones	M	M	10/30/2000

## 3.2 SCENARIO 2: HIGH RISK HOME & AUTO

### 3.2.1 Add a new client

3.2.1.1 Add a new client/prospect by selecting **+New Client** from the top left area of the screen under **'File'**.



3.2.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.

- Select *'Personal'* for a personal lines applicant
- Select *'Commercial'* for a commercial lines applicant



3.2.1.3 Choose **'Personal'** and enter all mandatory fields on New Client Info screen:

3.2.1.4 Choose a package on the list and select 'Create'. For this client **select 'Home, Auto Complex with Umbrella' from 'Choose a Package'**; a green check will appear next to the package you have selected. Note that if you do not want to use an existing package you can choose not to pick a package and just **select 'Create'** and will then be able to choose appropriate ACORD forms.

 A screenshot of the 'New Client Info' form. The form has two tabs: 'Personal' (selected) and 'Commercial'. The form fields are filled with the following information:
 

- First Name: John
- Middle Initial: R
- Last Name: Jones
- Street Address 1: 198 W. Elm Street
- Street Address 2: (empty)
- Unit Number: (empty)
- City: Denver
- State: Colorado
- Zip Code: 80239
- Country: U.S.A
- Phone: (303)999-2563
- Fax: (empty)
- Email Address: JRJones69@gmail.com

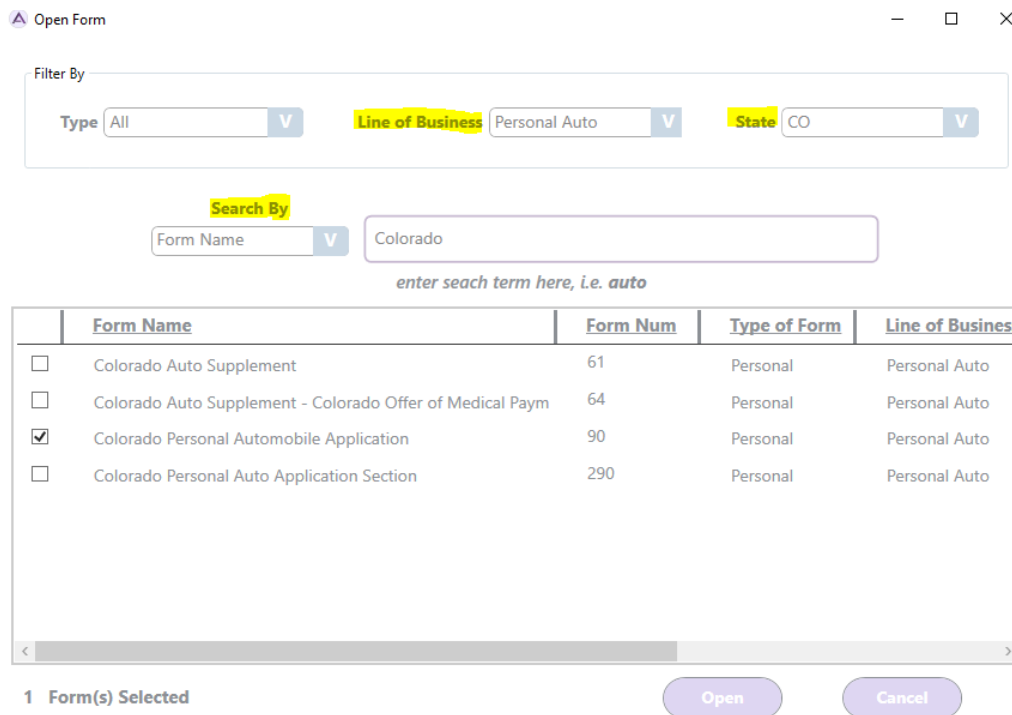
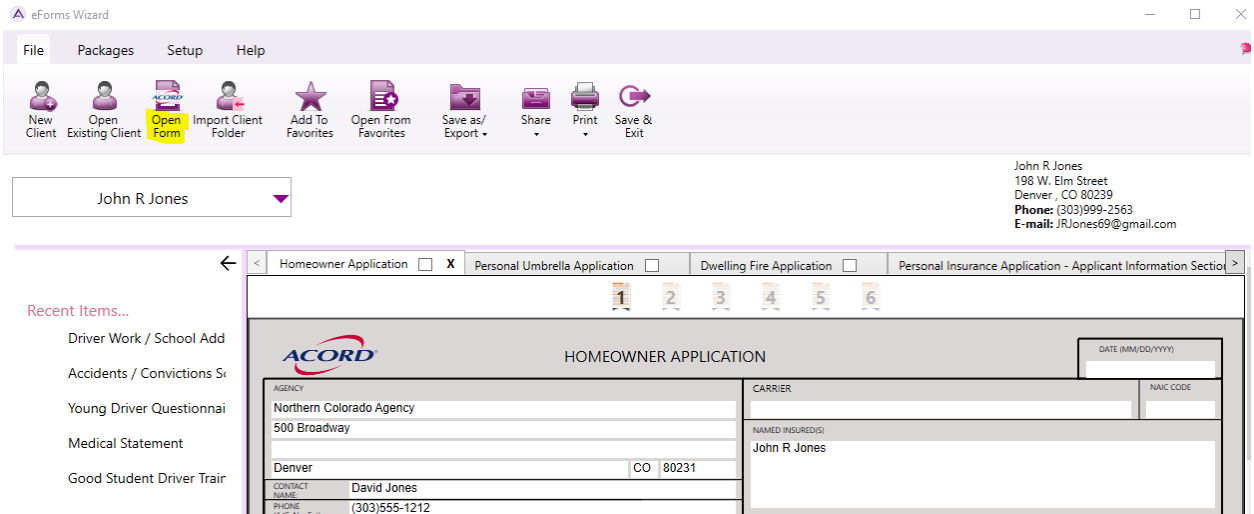
 On the right side, there is a 'Choose A Package' dropdown menu with the following options:
 

- Advanced PL
- Advanced
- Advanced2
- Basic
- Dwelling Fire Monoline
- Home, Auto Complex with Umbrella (checked with a green checkmark)
- Home, Auto, Marine & U...
- Home, Auto, Umbrella
- Home, Rental, Auto & Un...

 Below the package list are 'Create' and 'Cancel' buttons.

3.2.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.

3.2.1.6 To add your state-specific Auto Application to the application set. Choose **'Open Form'**. Filter by **Line of Business = 'Personal Auto'**; **State = 'CO'**; in the Search By select **Form Name** and type **'Colorado'**.



3.2.1.7 Complete the application and Save & Exit.

## 4 COMMERCIAL LINES SCENARIOS

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### 4.1 SCENARIO 1: CYBER

#### 4.1.1 Add a new client

- 4.1.1.1 Add a new client/prospect by selecting **+New Client** from the top left area of the screen under 'File'.



- 4.1.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.

- *Select 'Personal' for a personal lines applicant*
- *Select 'Commercial' for a commercial lines applicant*

- 4.1.1.3 Choose 'Commercial' and enter all mandatory fields on New Client Info screen:

*Secure Horizon Retirement Resort*

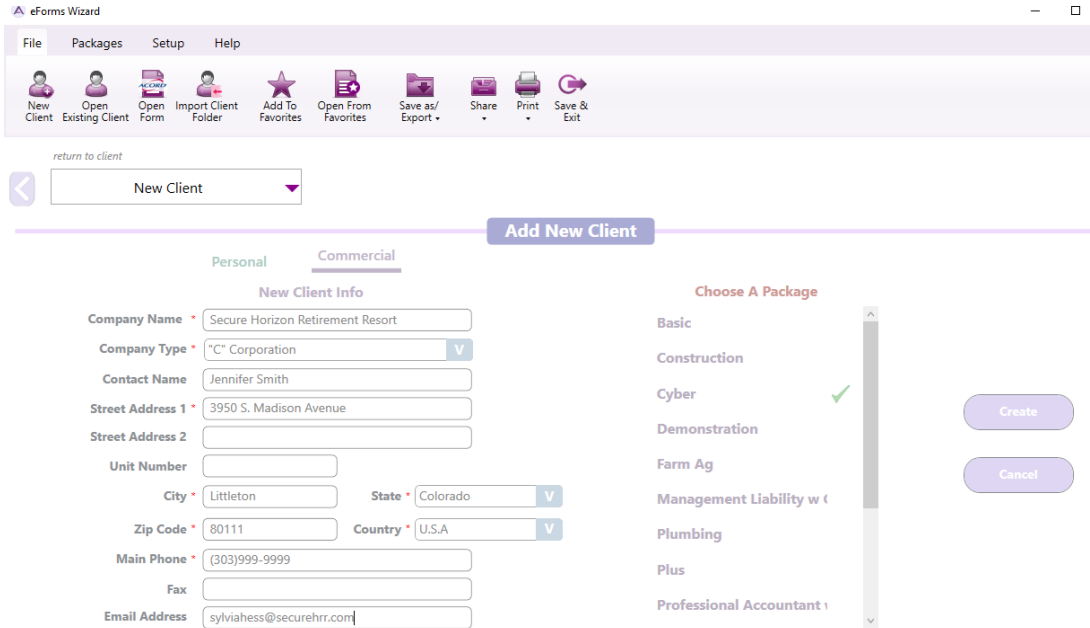
*C Corp*

*3950 S Madison Ave*

*Littleton, CO 80111*

*303-999-9999*

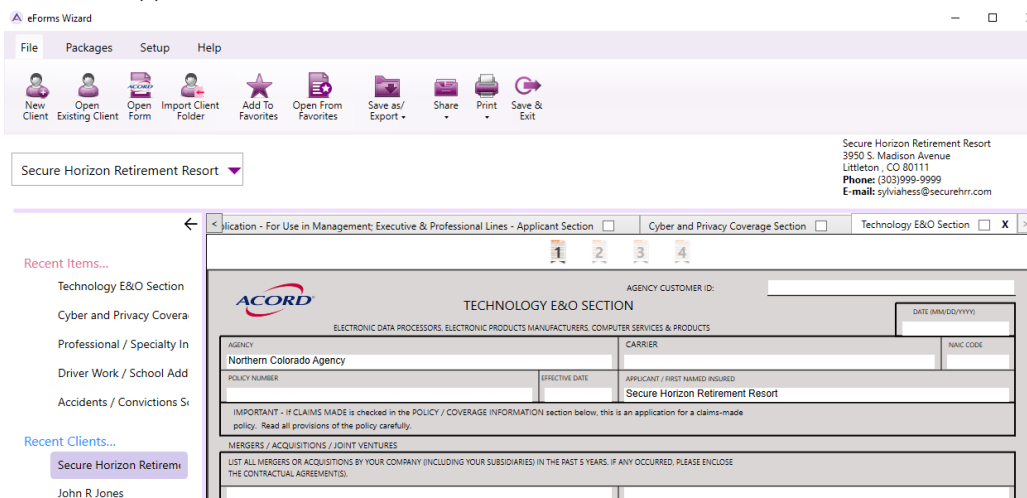
*[sylviahess@securehrr.com](mailto:sylviahess@securehrr.com)*



4.1.1.4 Choose the appropriate package if you have one and select ‘Create’. For this client *select ‘Cyber’ from Choose a Package*; note that if you do not want to use an existing package you can choose not to pick a package and just *select ‘Create’* and will then be able to choose appropriate ACORD forms.

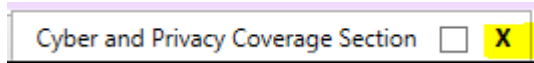
4.1.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.

- *When more than 4 applications are included you can use the right and left arrow keys (< & >) on each side of the application display to display other selected applications.*





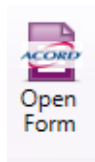
4.1.1.6 To remove an application from the selected package select the 'X' from that particular application.



4.1.1.7 To add an application from the selected package select 'Open Form' from the top left of the screen and a popup page will appear to select the additional forms by checking the boxes to the left of the form name and select 'Open'.

You can search for the desired form by:

- ✓ Filtering by Type, Line of Business and State
- ✓ Searching by form name, form number, edition or key words
- ✓ Scrolling through forms list



Open Form

Filter By

Type: Commercial Specialty | Line of Business: All | State: All

Search By

All Columns | enter search term here, i.e. auto

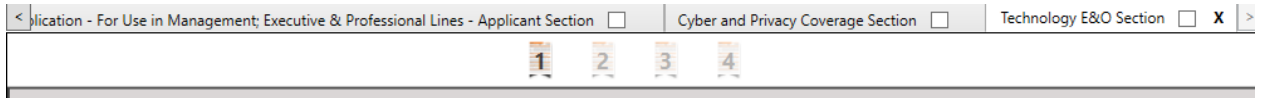
	Form Name	Form Num	Type of Form	Line of Busin <sup>^</sup>
<input checked="" type="checkbox"/>	Technology E&O Section	180	Commercial Spe	Tech E&O
<input type="checkbox"/>	Arkansas Technology E&O Section	180	Commercial Spe	Tech E&O
<input type="checkbox"/>	South Dakota Technology E&O Section	180	Commercial Spe	Tech E&O
<input type="checkbox"/>	Professional Liability Supplement	187	Commercial Spe	Professional Lie
<input type="checkbox"/>	Directors & Officers Liability Section	807	Commercial Spe	D&O
<input type="checkbox"/>	Arkansas Directors & Officers Liability Section	807	Commercial Spe	D&O
<input type="checkbox"/>	Minnesota Directors & Officers Liability Section	807	Commercial Spe	D&O
<input type="checkbox"/>	MontanaDirectors & Officers Liability Section	807	Commercial Spe	D&O

1 Form(s) Selected

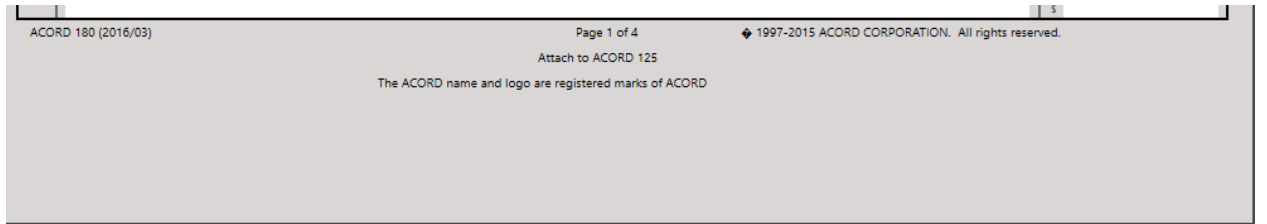
Open Cancel

4.1.1.8 Use the paging buttons at the top or bottom of each application or enter the page number at the bottom of each application to move forward or back.

- The selected page will be in bold on the top of each application where total number of pages is displayed.



- As you complete each field you can use your tabbing button to move to the next field and screen will automatically scroll down or you can use the scroll from the right side of the application.
- The selected page will be displayed at the bottom of each application next to 'Current Page'



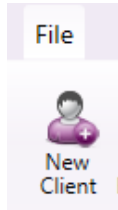
4.1.1.9 Information that is input and used in different selected package application(s) will automatically pre-fill. Complete the Professional/ Specialty Ins. Application information and when you access the later pages in the application the information will already be pre-filled.

- Likewise, when any of the applications are updated system will also automatically update the other line of business.

## 4.2 SCENARIO 2: AGRICULTURE

### 4.2.1 Add a new client

- 4.2.1.1 Add a new client/prospect by selecting **+New Client** from the top left area of the screen under 'File'.



- 4.2.1.2 This takes you to the 'New Client Info' screen where you will enter the basic information about your client/prospect.

- Select 'Personal' for a personal lines applicant
- Select 'Commercial' for a commercial lines applicant

- 4.2.1.3 Choose 'Commercial' and enter all mandatory fields on New Client Info screen:

*Clark Farms*  
*18930 Hwy 83*  
*Franktown, CO 80133*  
*303-999-9999*  
[info@clarkfarms.com](mailto:info@clarkfarms.com)

- 4.2.1.4 Choose the appropriate package if you have one and select 'Create'. For this client *select 'Farm Ag' from Choose a Package*; note that if you do not want to use an existing package you can choose not to pick a package and just *select 'Create'* and will then be able to choose appropriate ACORD forms.
- 4.2.1.5 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.
- 4.2.1.6 All applications from your package will then be displayed with client information that was completed as well as your agency information pre-filled in each of the applications. Select each application individually to complete ACORD information on each application.

## 5 FORM NAVIGATION

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### 5.1 PAGE VIEW

#### 5.1.1 You can transition through the pages 1 of 4 ways:

- ✓ Tabbing through fields as entering
- ✓ Simply select the page # displayed located in the middle of the border at the top of the ACORD form
- ✓ Typing the selected page number in the 'Current Page' field in the middle of the bottom border at the bottom of the ACORD form
- ✓ Selecting the < or > options in the middle of the bottom border at the bottom of the ACORD form

### 5.2 ADDING A FORM

5.2.1 With the client still open and displayed in left upper corner of screen, select 'Open Form' from the File Menu.

#### 5.2.2 You can search for the desired form by:

- ✓ Filtering by Type, Line of Business and State
- ✓ Searching by form name, form number, edition or key words
- ✓ Scrolling through forms list

5.2.3 Select desired form or forms and select 'Open'.

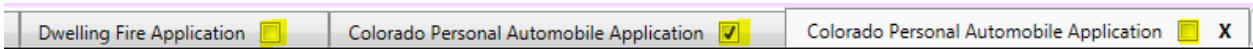
5.2.4 Added ACORD form/forms will be added to the displayed forms for completion.

## 6 SAVE OPTIONS

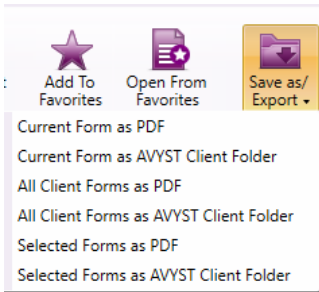
### 6.1 SINGLE

#### 6.1.1 Individually save only one of many applications of the selected package

6.1.1.1 Select the application you want to save by checking the box to the right of each application name:

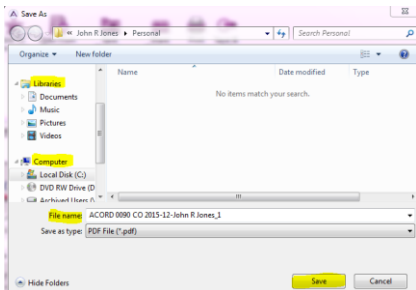


6.1.1.2 Select **'Save as / Export'** from the top of the screen under **'File'**



6.1.1.3 Select **'Current Form as PDF'** or **'Current Form as AVYST Client Folder'**

6.1.1.4 Select where you want to save your document and rename your file if necessary and select **'Save'**



### 6.2 ALL CLIENT FORMS

#### 6.2.1 Save all applications included in package together

6.2.1.1 Select **'Save as / Export'** from the top of the screen under **'File'**

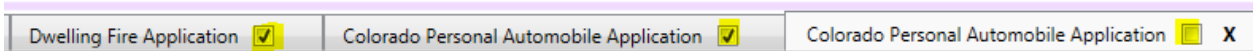
6.2.1.2 Select **'All Client Forms as PDF'** or **'All Client Forms as AVYST Client Folder'**

6.2.1.3 Select where you want to save your document and rename your file if necessary and select **'Save'**

## 6.3 SELECTED

### 6.3.1 Save only selected applications from your package

6.3.1.1 Select the applications you want to save by checking the box to the right of each application name:



6.3.1.2 Select **'Save as/Export'** from the top of the screen under **'File'**

6.3.1.3 Select **'Selected Forms as PDF'** or **'Selected as AVYST Client Folder'**

6.3.1.4 Select where you want to save your document and rename your file if necessary and select **'Save'**

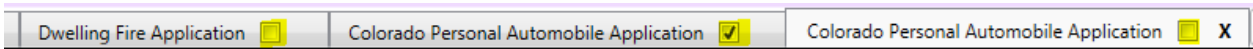
## 7 SHARE OPTIONS

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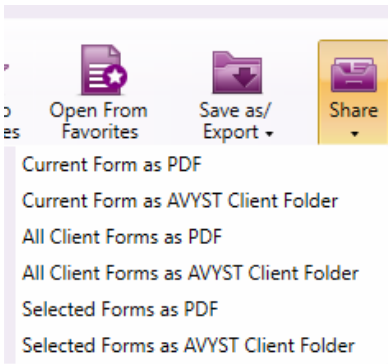
### 7.1 SINGLE

#### 7.1.1 Individually share only one of many applications of the selected package by email

7.1.1.1 Select the application you want to share by checking the box to the right of each application name:



7.1.1.2 Select **'Share'** from the top of the screen under **'File'**



7.1.1.3 Select **'Current Form as PDF'** or **'Current Form as AVYST Client Folder'**

7.1.1.4 This will auto generate a new email with the file attached so that you can enter recipient email address and **'Send'**

## 7.2 ALL

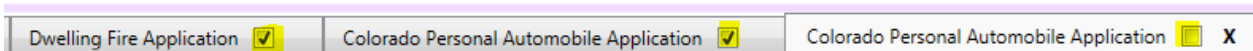
### 7.2.1 Share all applications included in package together by email

- 7.2.1.1 Select **'Share'** from the top of the screen under **'File'**
- 7.2.1.2 Select **'All Client Forms as PDF'** or **'All Client Forms as AVYST Client Folder'**
- 7.2.1.3 This will auto generate a new email with the file attached so that you can enter recipient email address and **'Send'**

## 7.3 SELECTED

### 7.3.1 Share only selected applications from your package by email

- 7.3.1.1 Select the applications you want to share by checking the box to the right of each application name:



- 7.3.1.2 Select **'Share'** from the top of the screen under **'File'**
- 7.3.1.3 Select **'Selected Forms as PDF'** or **'Selected Forms as AVYST Client Folder'**
- 7.3.1.4 This will auto generate a new email with the file attached so that you can enter recipient email address and **'Send'**

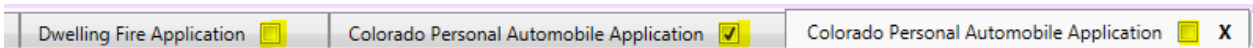
# 8 PRINT OPTIONS

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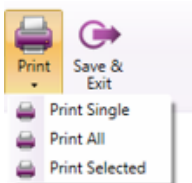
## 8.1 PRINT SINGLE

### 8.1.1 Individually print only one of many applications of the selected package

- 8.1.1.1 Select the application you want to print by checking the box to the right of each application name:

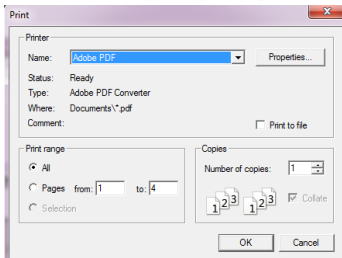


- 8.1.1.2 Select **'Print'** from the top of the screen under **'File'**



- 8.1.1.3 Select **'Print Single'**

8.1.1.4 Select your printer name and **'OK'**



**8.2 PRINT ALL**

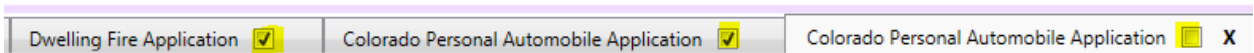
**8.2.1 Print all applications included in package together**

- 8.2.1.1 Select **'Print'** from the top of the screen under **'File'**
- 8.2.1.2 Select **'Print All'**
- 8.2.1.3 Select your printer name and **'OK'**

**8.3 PRINT SELECTED**

**8.3.1 Print only selected applications from your package**

- 8.3.1.1 Select the applications you want to print by checking the box to the right of each application name:



- 8.3.1.2 Select **'Print'** from the top of the screen under **'File'**
- 8.3.1.3 Select **'Print Selected'**
- 8.3.1.4 Select your printer name and **'OK'**