



Installing & Using AutoComm



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Understanding AutoComm

AutoComm makes faxing and emailing fast and easy. AutoComm (previously AutoFax), is the interface between your DDMS system and the Symantec™ WinFax™ PRO software. You can communicate directly from your system to any fax machine or computer. Simply connect your DDMS system to a PC running AutoComm and WinFax PRO software. Choose the information to fax or email and let AutoComm do the rest.

*You can purchase
WinFax PRO at
[www.symantec.com/
purchase](http://www.symantec.com/purchase).*

As with the previous versions of AutoFax, you can fax invoices, pick tickets, purchase orders, statements, and word processing files. Now you can email them as well. You can accurately transmit large volumes of information from your DDMS system. AutoComm passes faxes to WinFax PRO for faxing and sends email through your mail server.

Using either the (&) DDMS Faxing screen or the appropriate application screen, you can send invoices, account statements, and files to your customers. You can also fax purchase orders to your vendors. There are several faxing and emailing functions you can easily perform from the DDMS system.

System Requirements

- Windows® NT, Windows 98, Windows ME, Windows 2000 or Windows XP Operating Systems
- Intel® Pentium® 233 MHz or higher processor
- 64 MB of RAM (128 MB recommended)
- Internal/external dedicated modem
- Dedicated phone line (no incoming calls)
- WinFax PRO 10.0 or 10.03.

Note: WinFax PRO 10.01 - 10.02 and WinFax Basic Edition are not compatible with your DDMS system.

What You Need To Set Up

Note: If you are only updating AutoComm software, you must back up any settings and fax forms you have customized. The software update overwrites them with default settings and images. Before installing the AutoComm software update, make a backup copy of the Data and Images folders, which reside in the \DDMS\AutoComm directory of the PC where AutoComm is installed. After updating the software, restore the Data and Images folders with your backup copy. Then you can continue using your customized settings and fax forms without re-creating them.



Installing & Using AutoComm

Install WinFax PRO and AutoComm on a PC separate from your DDMS server, but on the same network as your DDMS server.

- 1 Install WinFax PRO on a PC separate from your DDMS server
- 2 Install AutoComm on the same PC where you installed WinFax PRO
- 3 Configure your DDMS server
- 4 Configure your AutoComm ports
- 5 Set AutoComm options
- 6 Configure WinFax PRO.

ASP users, to find your ASP server's IP address, email aspsupport@eci2.com.

Note: ASP users must obtain WinFax PRO and install it on a PC at their site. ECI² does not host servers for third-party software. In addition, special setup is required on the ASP servers to communicate with WinFax PRO. To implement AutoComm with your ASP service, email a request to aspsupport@eci2.com.

You can purchase WinFax PRO at www.symantec.com/purchase.

Installing WinFax PRO

You must install WinFax PRO on a PC separate from your DDMS server. This PC must be on the same network as your DDMS server. If you have any questions, refer to the WinFax PRO installation instructions that came with the software.

Installing AutoComm

Install AutoComm on the same PC where you installed WinFax PRO. Using your DDMS software update CD, select Install Other Software from the AutoRun menu. Then select Install AutoComm and follow the prompts on your screen.

Configuring your DDMS Server

Before you can use AutoComm, you need to set up your DDMS server's operating system to work with the program. On your DDMS server:

- Find your IP address
- Set up TBL NetCom with your operating system
- Configure your (L6T) Fax Parameters screen.

Finding Your DDMS Server's IP Address

- 1 Click Start, select Run and type **Cmd** in the box. Press Enter.
- 2 The Cmd.exe window opens. Type **ipconfig** and press Enter.
- 3 Note your IP Address for use later.
- 4 Close the Cmd window.



Setting Up TBL NetCom

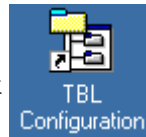
Follow the steps for your DDMS server's operating system:

- Windows
- UNIX.

Setting Up a Windows Operating System

- 1 Double-click My Computer on your desktop. In the address box, enter **D:\DDMS\TBLNetCom**.
- 2 From the TBLNetCom folder, open the updateini.bat file.
- 3 When the Cmd screen opens, enter your IP Address at the prompt.
- 4 At the Terminal ID prompt, enter **T0** if you are not using Dealer Station. If you are using Dealer Station, enter the terminal number from the (L1) screen.
- 5 Another Terminal ID prompt displays. Press Enter.
- 6 A new ini file called TBLNetCom.ini, is created and saved in the TBLNetCom folder.

- 7 On your desktop, double-click



- 8 In the left pane, click Advanced.
- 9 Right-click Gateway Definitions and click Add New.
- 10 The Add/Modify Gateway dialog box opens. In the Gateway Name box, type **Autocomm**.
- 11 In the TBL Port box, type **MF**.
- 12 In the Logical Name box, type **T1**.
- 13 Clear the Enable Gateway checkbox.
- 14 Click OK.
- 15 Close the TBLConfig window.
- 16 Restart the TBLServer.

Go to the heading **Configuring Your (L6T) Fax Parameters Screen**.

Setting Up a UNIX Operating System

- 1 Insert the software update tape into the appropriate drive.
- 2 At the Keyop Menu, select the Software Update option and press Enter.
- 3 At the Select Media Drive prompt, select **T** for tape and press Enter.

Note: You are prompted for the tape drive only if you have more than one drive.

- 4 Installation begins. Files scroll across the screen. At the # prompt, installation is complete.
- 5 Configure the TBLNetCom Program with an IP and port number.
 - Step 1:** At the Keyop Menu, select the [!] UNIX Shell option and press Enter.
 - Step 2:** At the # prompt, type `cd/u/ddms/TBLNetCom` and press Enter.
 - Step 3:** At the # prompt, type `./install.script` and press Enter.
 - Step 4:** At the message You Must Be Superuser, press Enter.
 - Step 5:** The Please Enter Your IP Address prompt appears. Enter the IP address of your DDMS Server or the network card to which to point the DDMS Windows products.
 - Step 6:** The Terminal ID prompt appears. If you are using Dealer Station, enter your Dealer Station terminal ID or type **L1**, and press Enter. If you are not using Dealer Station, enter the terminal number you set up in the (L1) Terminal and Tickets Parameters screen.
 - Step 7:** At the # prompt, type `exit` and press Enter.
 - Step 8:** At the Press Enter to Continue prompt, press Enter.
 - Step 9:** Restart your system. To do this, type `$` at the Keyop Menu.

Configuring Your (L6T) Fax Parameters Screen

Before faxing from your DDMS System, you must set up the (L6T) screen on your DDMS server.

- 1 In the (L6T) screen, tab to the Phone Line field. Type **DY**. See Figure 1.
- 2 Tab to the Logon ID field and type **AUTOCOMM**.
- 3 Tab to the Network field and type **A**.
- 4 In the Statements field, accept the default, **CFSTA**, or enter another statement format.



- 5 In the Invoice field, accept the default, CI, or enter another invoice format.
- 6 In the Pick Ticket field, accept the default, CT, or enter another pick ticket format.
- 7 In the P/O field, enter a purchase order format.
 - Type **CFPO** to use a standard P/O format.
 - Type **CFPOE** to use a standard P/O format with extended item number.
 - Type **CFPOC** to use a standard P/O format with combined like items.
 - Type **CFPOEC** to use a standard P/O format with extended item number and combined like items.
- 8 When you finish, press Enter.

Figure 1: Setting Up the (L6T) Fax Parameters Screen

```

16:40:36                FAX Parameters                01/29/04
=====
Modem Parameters 05/23/94                FAX Parameters
-----
Modem Type ? [1=2400E 2=NEC 3=MICROCOM]    Phone Line  #DY
Dialing Prefix :                          Baud :    Code      :
Phone Nbr #          Reliable ?            Logon Id   :AUTOCOMM
===== Modem Initialization String ===== Password   :
Qualifier  :
[          ]                               Id        :
Code       :
Network    :A
-----
Script :                                     Formats
Fax Vol:                                     Statements :CFSTA
-----
Location #
1          [ Fax ] [Email]
2          :
3          :
4          :
5          :
Renewals   :
-----

```



Configuring Your AutoComm Ports

Perform these steps on the PC where you installed AutoComm.

- 1 In the AutoComm window, click Port Setup.
- 2 In the Communication Port Setup dialog box, click Network.
- 3 In the Server Port box, type **8766**.
- 4 In the DDMS Port ID box, type **M** and one other character, such as **F**. The second character cannot already be used in setup under modems or in TBLconfig with an enabled gateway. (An enabled gateway is one set to True in TBLConfig under Advanced in Gateway Definitions).
- 5 In the Server Address box, enter your DDMS Server IP Address. See **Finding Your DDMS Server's IP Address**.
- 6 Click Test.
- 7 When the test is complete, a message confirms its success. Click OK.

*ASP users, to find
your port number,
email
aspsupport@eci2.com.*

Setting AutoComm Options

Perform these steps on the PC where you installed AutoComm. You can customize AutoComm by:

- Fax options
- Email options.

Setting Faxing Options

Faxing options include:

- Cover sheet and logo
- Format
- Area code
- General.

Setting Cover Sheet and Logo Options

In the Cover Sheets tab, shown in Figure 2, you can assign a different cover page and logo design for each company location from which you send a fax. Cover sheets and logos must be created as Bitmaps (.bmp), GIFs (.gif) or JPEGs (.jpg). WinFax PRO 10.0 has pre-designed cover sheets.


Note: The cover sheets and logo options only apply to the fax feature. The logo always begins in the upper left corner of the document. It can be any size, but be careful not to cover the text.



The format must be a valid format on the DDMS system. All graphics files must be created as Bitmaps (.bmp), GIFs (.gif) or JPEGs (.jpg).

To change or delete an existing cover sheet or logo design, click the location to change and enter new information over the existing information. Click Update. To delete the cover sheet or logo, click the location and click Delete.

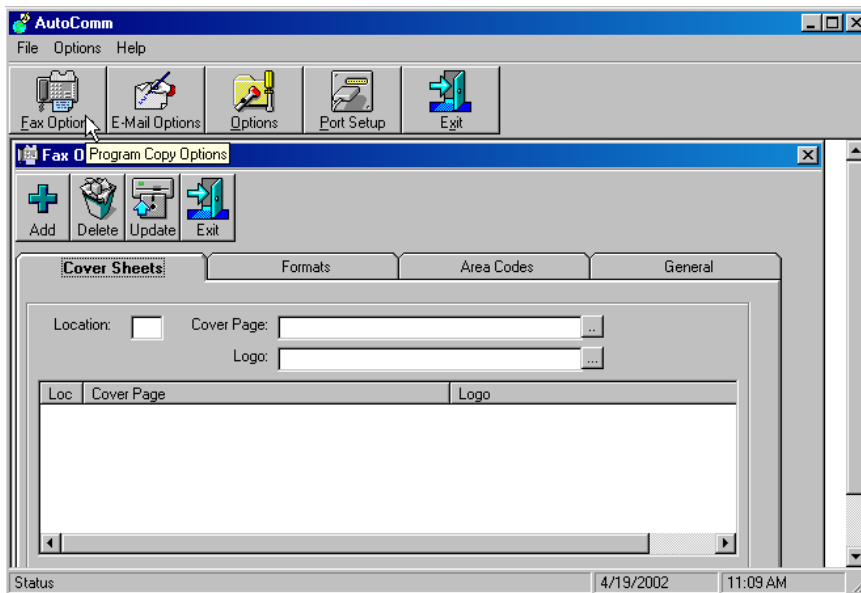
To add a cover sheet:

- 1 Click Fax Options.
- 2 Click the Cover Sheets tab.
- 3 Click Add.
- 4 In the Location box, enter a location number to assign to the cover sheet or logo. This is the G/L Location from which the terminal is sending faxes. You should verify your location in the (LØ) Global Master Parameters screen. For example, location 1 is different from location 01.
- 5 Click  next to the Cover Page box.
- 6 Go to c:\ProgramFiles\Winfax\Cover. Click a cover sheet and click Open.
- 7 Click Update to save your changes.


To add a logo:

- 1 Click Fax Options.
- 2 Click the Cover Sheets tab.
- 3 Click Add.
- 4 In the Location box, enter a location number to assign to the logo. This is the G/L Location from which the terminal is sending faxes. You should verify your location in the (LØ) screen. For example, location 1 is different from location 01.

Figure 2: Selecting a Cover Sheet



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- 5 Click  next to the Logo box.
- 6 Go to c:\ProgramFiles\Winfax\Logo. Click an image file and then click Open.

Note: Image files to be used as logos should be stored on the C: drive of your AutoComm PC.

- 7 Click Update to save your changes.

To delete a cover sheet or logo:

- 1 Click Fax Options and click the Cover Sheets tab.
- 2 From the list, click the cover sheet or logo to delete.
- 3 Click Delete.
- 4 At the Delete Loc prompt, click Yes.



Setting Format Options

In the Formats tab, you can create images for the tickets, purchase orders and statement formats that come from your DDMS system. For example, you can create a layover image from your PC for your statements. It can include a box for the billing address, a box for the balance due, and another for any remarks.

Layover formats give statements a uniform look. They can be simple or elaborate, but make sure they do not cover any information. Shading is not recommended because most fax machines do not support it. DDMS has created default formats and images, so you do not have to create your own.

You can also attach a separate document to be faxed. For example, you might attach a sales flyer created in Windows. This flyer is attached and faxed every time you fax this format.

To add a format:

- 1 Click Fax Options.
- 2 Click the Formats tab.
- 3 Click Add. Type a format ID in the Format box. The Format ID is the format name being sent from DDMS.
- 4 You can add an image or an attachment to the format.
 - To add an image, click  next to the Image box and choose the desired image.
 - To add an attachment, click Add Attachment. Click  next to the Attachment box and select the attachment.
- 5 Click Update to save.

To change a format:

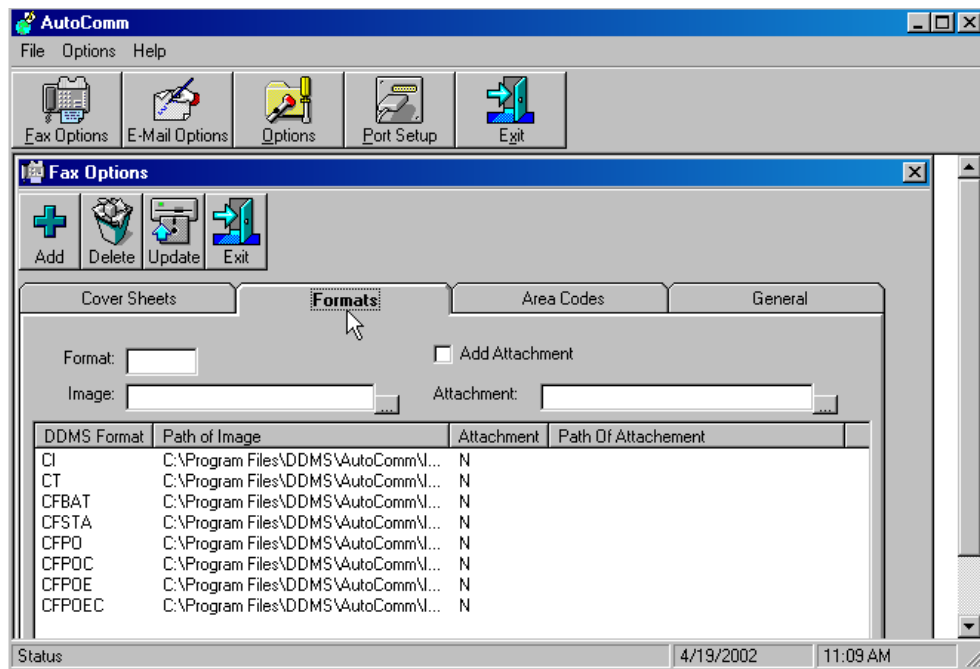
- 1 Click Fax Options.
- 2 Click the Formats tab.
- 3 From the list, click the format to change. See Figure 3.
- 4 When the format information appears in the boxes above the list, make the desired changes.
- 5 Click Update.

To change or delete an existing format, click the format to change or delete and enter new information over the existing information. Click Update. To delete a format, click it and click Delete.

To delete a format:

- 1 Click Fax Options.
- 2 Click the Formats tab.
- 3 From the format list, click the format to delete.
- 4 Click Delete.
- 5 The message Delete XXXX (X denotes the format), appears. Click Yes.

Figure 3:
Selecting a
Format



Setting Area Codes Options

Use the Area Codes tab to set up area codes and dialing prefixes. See Figure 4. There are several ways to enter area codes and phone numbers. The default setting is for 11-digit dialing, as for long distance calls. Numbers are dialed in this manner: 1 + area code + number.

Some area codes require the area code plus the number even for local calls. This is 10-digit dialing.

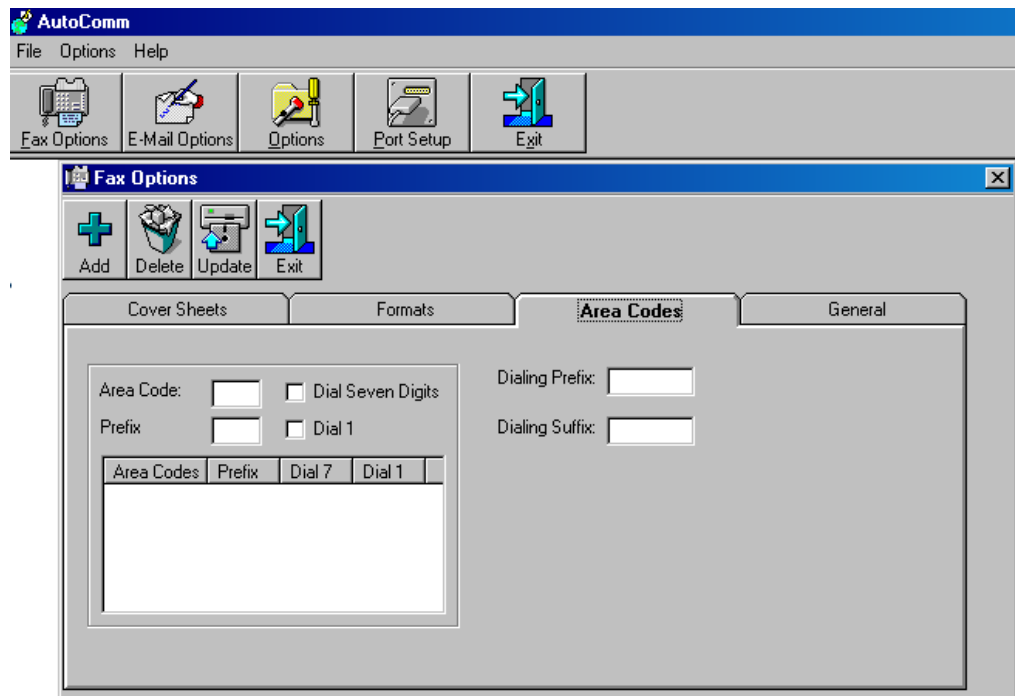
For local calls that do not require an area code, use 7-digit dialing. For example, suppose you are in the 972 area code, and are required to dial a seven-digit phone number. You would check the Dial Seven Digits box to dial the number without the area code.

Some area codes may have different dialing requirements within that area code. For example, in the 817 area code, you have to dial the area code plus the number even for local calls. However, this does not apply to numbers with a 478 prefix. To dial a number with a 478 prefix in the 817 area code, check the Dial Seven Digits box.

To add an area code:

- 1 Click Fax Options.
- 2 Click the Area Codes tab.

Figure 4: The Area Codes Tab



- 3 Click Add.
- 4 Set your dialing requirements.

To dial the area code plus the number (10-digit dialing):

Step 1: In the Area Code box, type the three-digit area code, for example, 555.

Step 2: In the Prefix box, type the first three numbers of the phone number to dial for that area code if the rules are unique. For example, the local area code for all numbers is 817 except for all numbers with the prefix 478.

Step 3: If you must dial a number to access an outside line, enter the number followed by a comma in the Dialing Prefix box. (The comma instructs the modem to pause for a short time before dialing the number.) For example, if you must dial a 9 to reach an outside line, type 9, in this box.

Step 4: When you finish, click Update.

To dial the number without the area code (7-digit dialing):

Step 1: Check the Dial Seven Digits check box to specify the number to dial. To include the area code when the number is dialed, leave this check box blank.

Step 2: In the Prefix box, type the first three numbers of the phone number to dial for that area code.

Step 3: If you must dial a number to access an outside line, enter the number followed by a comma in the Dialing Prefix box. (The comma instructs the modem to pause for a short time before dialing the number.) For example, if you must dial a 9 to reach an outside line, type 9, in this box.

Step 4: When you finish, click Update.

To dial 1 plus the area code plus the number (11-digit dialing):

Step 1: In the Area Code box, type the three digit area code, for example, 555.

Step 2: In the Prefix box, type the first three numbers of the phone number to dial for that area code.

Step 3: Click the Dial 1 check box. If this box is blank, only the area code and phone number are dialed.

To change or delete an existing area code, click the area code to change and enter the new information over the existing information. Click Update. To delete an area code, click it and click Delete.

Note: You do not need to check the Dial Seven Digits box for 11-digit dialing.

Step 4: If you must dial a number to access an outside line, enter the number followed by a comma in the Dialing Prefix box. (The comma instructs the modem to pause for a short time before dialing the number.) For example, if you must dial a 9 to reach an outside line, type 9, in this box.

Step 5: When you finish, click Update.

- 5 Repeat these steps for each number you add.

Setting General Options

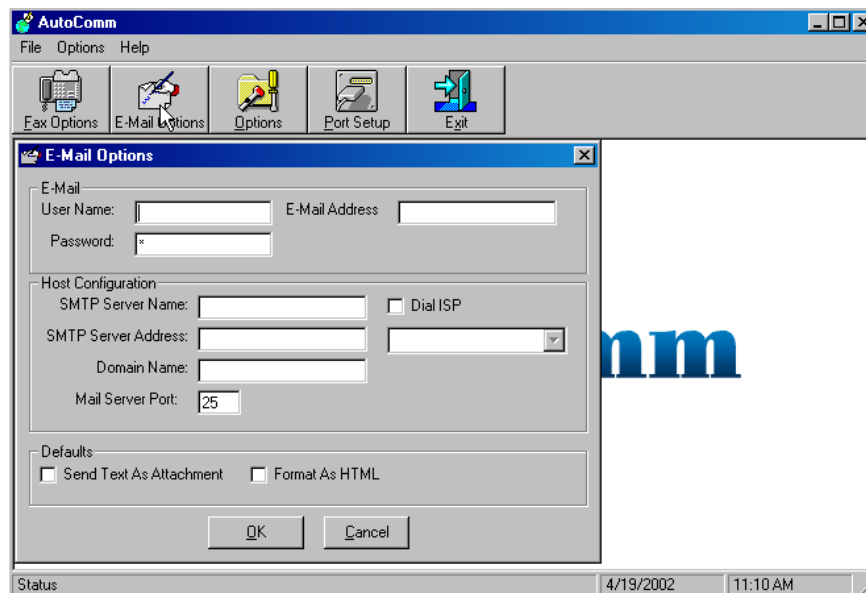
Use the General tab to send an email instead of a fax if the fax does not go through. Check the Email If Fax Failed box and enter an email address to use this feature. (*This option is for future use only.*)

Setting Email Options

The Email Options window, shown in Figure 5, lets you set up your email information, host configuration and defaults.

- 1 In the AutoComm window, click Email Options.
- 2 Enter your user name, email address, and user password in the User Name box, Email Address box and Password boxes. You can obtain this information from your MIS (Management Information System) representative or ISP (Internet Service Provider).

Figure 5: Setting Email Options in the Email Options Window



- 3 Enter your simple mail transfer protocol, server name, server address, and domain name in the SMTP (Simple Mail Transfer Protocol) Server Name, SMTP Server Address, and Domain Name boxes. You can obtain this information from your MIS representative or ISP.
- 4 In the Mail Server Port box, type your mail server port. (Most servers use port 25 as the email port.) You can obtain this information from your MIS representative or ISP.
- 5 The Dial ISP box is for dealers with dialup Internet access. If you have dialup Internet access, click the Dial ISP check box. In the list box located beneath the Dial ISP box, click the down arrow and choose the dialup adapter from the list. If you are not a Dial ISP dealer, leave the Dial ISP and corresponding list box blank.
- 6 The Send Text As Attachment and Format As HTML boxes work together. They let you specify how to send information. Using the Send Text As Attachment box, you can send files as an email attachment, instead of in the body of the email.

The corresponding Format As HTML box lets you format the text file as an HTML file. (HTML files can be viewed using Internet Explorer or Netscape software.)

- To send files as an attachment, click the Send Text As Attachment check box. If you leave the Send Text As Attachment check box blank, the text is sent in the body of the email, not as an attachment.
 - To send the attachment as an HTML file, click the Format As HTML check box.
- 7 Click OK to save your changes.

Configuring WinFax PRO

Perform these steps on the PC where you installed WinFax PRO.

- 1 In Message Manager, click Tools.
- 2 In the Tools menu, click Program Setup.
- 3 The WinFax PRO Program Setup Options tab opens. Double-click Dialing and Location.
- 4 In the Location tab, click Dial as Entered.
- 5 Click Apply, then OK.
- 6 In the WinFax PRO Program Setup Options tab, double-click Modems and Communications Devices. Make sure the correct modem is checked and Dial as Entered is selected from the Location list.

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- 7 Double-click User. This is the information that appears on the fax cover page. You can change it or leave it as it is.
- 8 Double-click Send. Clear the Send a Cover Page check box. (The cover page is sent through AutoComm.)
- 9 When you finish, close the WinFax PRO Program Setup dialog box.

Using AutoComm



You can send emails and faxes from the Order Entry, Purchase Order Entry and Accounts Receivable windows in Ensight Pro. You can also send faxes and emails using text-based software.

You can send mass faxes and emails to your customers. You can send batch statements to a customer via fax or email. You can even transmit files.



Faxing in Ensight Pro

You can fax invoices, purchase orders, statements and files from several windows in Ensight Pro.

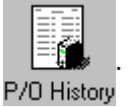

Using Order Entry History

- 1 Double-click  .
The icon shows a document with a pencil and a checkmark, with the text 'D/E History' below it.
- 2 Retrieve the invoice to send.
- 3 Click  . The Fax Order dialog box opens. The Account, Dept, Order Number and Name boxes display customer information.
- 4 Click the Contact box. You can enter the name of the person you are faxing.
- 5 In the Fax boxes, enter the 10-digit fax number.
- 6 Check the Dail One box if the fax number is long distance. Clear it if the fax number is local.
- 7 Click the Format box to enter the fax format. The invoice format provided by DDMS is CI. The pick ticket format provided by DDMS is CT. You can enter up to two alphanumeric characters.
- 8 To change the subject line text, click the Subject box and enter the new text.
- 9 To add text to the fax, click the Comments box. You can enter up to 40 characters.
- 10 When you finish, click OK to send the fax.

Using Accounts Receivable History

- 1 Double-click . The icon shows a computer monitor with a dollar sign and a green arrow pointing up, with the text 'A/R History' below it.
- 2 Retrieve the statement to send.
- 3 Click . The Fax Statement dialog box opens. The Account, Dept and Name boxes display customer information.
- 4 Click the Contact box. You can enter the name of the person you are faxing.
- 5 In the Fax boxes, enter the 10-digit fax number.
- 6 Check the Dail One box if the fax number is long distance. Clear it if the fax number is local.
- 7 Click the Format box to enter the fax format.
- 8 To change the subject line text, click the Subject box and enter the new text.
- 9 To add text to the fax, click the Comments box. You can enter up to 40 characters.
- 10 When you finish, click OK to send the fax.

Using Purchase Order Entry History

- 1 Double-click . The icon shows a document with a dollar sign and a green arrow pointing up, with the text 'P/O History' below it.
- 2 Retrieve the purchase order to send.
- 3 Click . The Fax P/O dialog box opens. The Account, P/O Number and Name boxes display customer information.
- 4 Click the Contact box. You can enter the name of the person you are faxing.
- 5 In the Fax boxes, enter the 10-digit fax number.
- 6 Check the Dail One box if the fax number is long distance. Clear it if the fax number is local.
- 7 Click the Format box to enter the fax format.
- 8 To change the subject line, click the Subject box and enter the new text.



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- 9 To add text to the fax, click the Comments box. You can enter up to 40 characters.
- 10 When you finish, click OK to send the fax.



Emailing in Ensite Pro

You can email invoices, purchase orders, statements and files.

Using Order Entry History

- 1 Double-click . The icon shows a computer monitor with a document and a pen, with the text 'D/E History' below it.
- 2 Retrieve the invoice to send.
- 3 Click . The Email Order dialog box opens. The Account, Dept, Order Number and Name boxes display customer information.
- 4 In the Contact box, you can enter the name of the person you are emailing.
- 5 In the Email box, enter the email address to use.
- 6 Click the Format box to enter the fax format.
- 7 To change the subject line, click the Subject box and enter the new text.
- 8 To add text to the email, click the Comments box. You can enter up to 40 characters.
- 9 When you finish, click OK to send the email.

Using Accounts Receivable History

- 1 Double-click . The icon shows a computer monitor with a document and a dollar sign, with the text 'A/R History' below it.
- 2 Retrieve the statement to send.
- 3 Click . The Email Statement dialog box opens. The Account, Dept and Name boxes display customer information.
- 4 In the Contact box, you can enter the name of the person you are emailing.
- 5 In the Email box, enter the email address to use.
- 6 Click the Format box to enter the statement format.

When using text-based software, check your caps lock.

Faxing Using Text-Based Software

You can fax invoices, purchase orders, statements and files from the (&) screen. You can also fax from the (G) Order Entry screen and from the (B) Accounts Receivable screen. Or you can use the (F) Purchase Order Entry screen to fax.

Faxing Invoices from the (&) Screen

- 1 In the (&) screen, type 1 to select the [1] Invoice function, as shown in Figure 6.

Note: In Ensite Pro Master Menu, double-click  to open the (&) screen.

- 2 The cursor moves to the Invoice # field. At this point, you can enter the number of the invoice to fax or specify another file. To specify the invoice number, enter the number and press Enter. See Figure 7. Go to **Step 3**.

If the invoice is in a file other than P-MASTER, press Esc to move the cursor to the file field. Enter the correct file name and tab to the Vol field. Enter the volume serial where the file is located and press Enter. The cursor returns to the Invoice # field. Enter the invoice number and press Enter.

- 3 The invoice number displays, along with the Correct Ticket/Invoice prompt. If the displayed invoice is correct, type Y. If it is not, type N and choose the correct invoice.

Figure 7: Faxing an Invoice in the (&) Screen

```

16:06:37                FAXING PROGRAM (06/28/00)                08/15/00
-----
Action: ** INVOICE **
Modem Type ?   Baud [    ]
Reliable ?
Phone #
Dialing Prefix ?
Network ?A

Acct: [          ] Dept: [    ]
Name: [          ]
Suite [          ]
Address [          ]
City [          ] St [    ] Zip [    ]-[    ]

Inv.: [CI] Pick:[CT] FAX # (    ) -

Invoice # [    - ]      File [P-MASTER ] Vol:[V5 ]
-----
* * S T A T U S * *
    
```

- 4 The contact name appears at the bottom of the screen. At the correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 5 At the Format/Fax Number Correct prompt, type **Y** if the format and fax number are correct. If not, type **N** to change the format and fax number.
- 6 At the Does the Fax Number Require 1+ prompt, type **N**. (You set up your phone number prefixes in the AutoComm program). Type **Y** if the number does require a 1.
- 7 At the Ready To Fax prompt, type **Y**.
- 8 At the Change Modem Parameters prompt, type **N** to accept the parameters. Type **Y** to change the parameters.
- 9 At the Enter Comments prompt, you can enter additional text on the fax. This text prints on the cover sheets of your fax. To enter text, type **Y**. The cursor moves to the Comments field. Enter any additional text, up to 50 characters, in this field. If you do not completely fill the field, press Enter.
- 10 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 11 The Building Invoice/Pick Ticket for Faxing message appears, followed by the Sending to AutoComm message.
- 12 When the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Faxing Purchase Orders from the (&) Screen

- 1 In the (&) screen, type **2**.
- 2 The cursor moves to the P/O Numbers field. In the P/O Numbers field and the corresponding To field, you can enter the range of purchase orders to fax to the vendor. You can define this range by specifying a beginning purchase order number in the P/O Numbers field. Enter an ending P/O number in the corresponding To field. Press Enter. See Figure 8.
- 3 At the Correct Vendor prompt, type **Y**.
- 4 At the Format/Fax Number Correct prompt, type **Y** if the format and fax number are correct. Type **N** to change the format and fax number.

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- 5 At the Does Fax Number Require 1+ prompt, type **N**. You set up your phone number prefixes in the AutoComm program. Type **Y** if the number requires a 1.
- 6 Type **Y** at the Ready to Fax prompt.
- 7 At the Change Modem Parameters prompt, type **N** to accept the parameters or type **Y** to change them.
- 8 You can enter additional text on the fax at the Enter Comments prompt. This text prints on the cover sheet. To enter text, type **Y**. The cursor moves to the Comments field. Enter any additional text, up to 50 characters, in this field. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding text.
- 9 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 10 After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Figure 8: The Purchase Order Numbers/To field

```
16:06:37                                FAXING PROGRAM (06/28/00)                                08/15/
00
-----
-                                                                 Action: ** PURCHASE ORDER **
Modem Type ?   Baud [      ]
Reliable ?
Phone #
Dialing Prefix ?
Network ?A

      Vendor# [          ]
      Name   [          ]
      Suite  [          ]
      Address [          ]
      City   [          ] St [  ] Zip [    ]-[    ]

      P/O [CFPOE ]      FAX # (    ) -      Mark as Faxed Y/N ?N

      P/O Numbers [          ] to [          ]
----- * * S T A T U S * * -----
-
Enter P/O numbers
```

Faxing Statements from the (&) Screen

- 1 In the (&) screen, type 3.
- 2 In the Name field, enter the customer name and press Enter. See Figure 9. To select the customer by account number, press Esc to move to the Acct field. Enter the customer account number and press Enter.
- 3 At the Correct Customer prompt, type Y.
- 4 At the Format/Fax Number Correct prompt, type Y if the format and fax number are correct. Type N to change the format and fax number.
- 5 At the Does Fax Number Require 1+ prompt, type N. (You set up your phone number prefixes in the AutoComm program.) Type Y if the number requires a 1.
- 6 In the Age By field, enter the age by date or press Tab to accept the default.
- 7 In the Cutoff By field, enter the cutoff date or press Tab to accept the default.
- 8 In the Age Date field:
 - To age receivables by invoice date, type I.
 - To age receivables by discount date, type D.
 - To age receivables by a date you select, type U.
- 9 At the Ready To Fax prompt, type Y.

Figure 9: Faxing a Statement from the (&) Screen

```

09:03:04                                FAXING PROGRAM (06/28/00)                                10/05/00
-----
Action: ** STATEMENTS **
Modem Type ?1 Baud [9600]
Reliable ?Y
Phone #18003520192
Dialing Prefix ?9,
Network ?A

Acct: [          ] Dept: [    ]
Name: [          ]
Suite [          ]
Address [          ]
City [          ] St [    ] Zip [    ]-[    ]

Format: [STATE ] FAX # (    ) -
Age By:10/05/00 Cutoff By:99/99/99 Age Date I/U/D :I
-----
* * S T A T U S * * -----

```

- 10 At the Change Modem Parameters prompt, type **N** to accept the parameters. Type **Y** to change them.
- 11 You can enter additional text on the fax at the Enter Comments prompt. This text prints on the cover sheet of your fax. To enter text, type **Y**. The cursor moves to the Comments field. Enter up to 50 characters in this field. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding extra text.
- 12 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 13 After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Faxing Invoices from the (G) Screen

- 1 In the (G) screen, enter your order writer number.

Note: In the Ensite Pro Order Entry window, press Shift + F2 to open the (G) screen.

- 2 In the Action field, type **F**. See Figure 10.
- 3 In the Transaction # field, enter the number of the invoice to fax and press Enter.

Figure 10:
Faxing an
Invoice from the
(G) Screen

```

16:29:32                (G) Order Entry (06/01/00)                07/28/00
-----
Order Writer :0221      G/L Loc # 1  Inv Loc # 1      Transaction #_____
Action ?F              File :P-MASTER  Vol :V5??
Name :_____          Account #_____
                        Slsm :___  Status :_  P/O #_____
                        Lines #___ ._%
                        Sub-Total $_____
-----
#  Item      Mfg      Description      UM C Order  Ship  Price
-----
----- Action Codes -----
O=Order      S=Drop Ship Order
V=Verify     C=Change Order
I=Inquire   P=Print
D=Delete    X=Credit Returns
R=Release   E=EDI Release
Q=Quote     M=Modify Quote
A=Auto Bill J=Journal Actions
F=Fax Invoice U=Furniture
G=E-Mail Inv. L=Customer Price
    
```

- 4 At the Correct Ticket prompt, type **Y**.
- 5 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 6 The fax number, format, and modem line appear at the bottom of the screen. At the Change Defaults prompt, type **Y** to change the fax number, format, or modem line. Type **N** to accept the defaults.
- 7 At the Does Fax Number Require 1+ prompt, type **N**. (Your phone number prefixes are set in the AutoComm program.) If the number does require a 1, type **Y**.
- 8 At the Enter Comments prompt, you can enter additional text to print on the cover sheet. To enter text, type **Y**. The cursor moves to the Comments field. If you do not completely fill the field, press Enter.
- 9 At the Ready To Fax Ticket prompt, type **Y**.
- 10 The cursor returns to the Transaction # field so you can specify another invoice number to fax. To return to the Action field, press Esc.

Faxing Statements from the (B) Screen

- 1 In the (B) screen, type **F** in the Action field. See Figure 11.
- 2 In the Name field, enter the customer name and press Enter. You can enter up to 30 characters.
- 3 At the Correct Record prompt, type **Y**.

Figure 11:
Faxing a
Statement from
the (B) Screen

```

16:13:14          (B) Accounts Receivable Posting rev. (06/21/00)          08/15/00
===== $ _____
Action [F]  File [AR-MASTER ] Vol. [V5 ]  Batch #____ Control G/L ____-____
=====
Name       : _____ Number: _____ Last Payment MM/DD/YY
Suite     : _____ Discount ?_ %_. _ # _____ of $ _____
Street    : _____ Slsm : _____ Limit $ _____ Avg Days # _____
City     : _____ St : _____ Zip # _____ Status :_ Prev $ _____
Phone #   : _____-____-____ Contact : _____ Curr $ _____
          Check # _____ Of $ _____ Up TO Date ?MM/DD/YY Total$ _____
INVOICE #  DATE    CHECK #  CHARGES  PAYMENTS  DISC. T  REMARKS  REVERSE
-----
-- Action Codes --
P = Post
I = Inquire
C = Change
B = Batch
Q = Quick Pay
A = Bad Accounts
F = Fax Statements
E = E-Mail Statements
O = Inquire by P/O #
    
```

- 4 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 5 At the Enter Comments field, type **Y** to enter additional text to the fax. Type **N** if you are not adding text.
- 6 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 7 At the Change Aging Date prompt, type **Y** if the information is correct. Type **N** to change it.
- 8 The fax number, format, and modem line are displayed. At the Change Defaults prompt, type **Y** if the defaults are correct. Type **N** to change them.
- 9 At the Does Fax Number Require 1+ prompt, type **Y** if the number requires a 1. Type **N** if it does not.
- 10 At the Ready to Fax Statement prompt, type **Y**.
- 11 The fax is sent. The cursor returns to the name field. Press Esc twice to return to the Action field.

Faxing Purchase Orders from the (F) Screen

- 1 In the (F) screen, type **F** in the Action field. See Figure 12.

Note: In the Ensite Pro Purchase Order Entry window, click File, then click Text Based POs to open the (F) screen.

Figure 12:
Faxing a P/O
from the (F)
Screen

```
14:28:56          (F) Purchase Order Entry rev. (06/21/00)          07/28/00
-----
Action [F]      Inv Loc [ 1]   File [All Files ] Vol [V5??]
Vendor #_____ Contact :_____ Phone #___-___-___
Name :_____ Fax #___-___-___ R.Phone #___-___-___
Street :_____ Account #_____ Last P/O #_____
City :_____ State :__ Zip #___-___ Current P/O #
----- Total Weight #_____ $_____ Due Date :_/_/_
STOCK NUMBER__ CO.____ DESCRIPTION_____ UNIT C ORDER RECEIV ACK. NBR.

-- Action Codes --
O=Order
C=Change
R=Receive
D=Delete
M=Debit Memo
I=Inquiry
F=Fax
E=Email
S=Short-Buys
P=Print
T=Transfer
```

- 2 In the Current P/O # field, enter the purchase order number to fax, and press Enter.
- 3 At the Correct P/O To Fax prompt, type Y.
- 4 You can enter additional text at the Enter Comments prompt. To enter text, type Y. In the Comments field, enter up to 50 characters. If you do not completely fill the field, press Enter. Type N at the Enter Comments prompt if you are not adding extra text.
- 5 At the Change Subject prompt, type N to accept the default. Type Y to change it. Enter the new text in the Subject field.
- 6 At the Change Defaults prompt, type N if the defaults are correct. Type Y to change them.
- 7 At the Does Fax Number Require 1+ prompt, type N. (Your phone number prefixes are set in the AutoComm program.) Type Y if the number does require a 1.
- 8 At the Are You Sure prompt, type Y.
- 9 The cursor returns to the Action field.

Faxing Files from the (&) Screen

- 1 In the (&) screen, type 4 in the Fax Type field.
- 2 In the Name field, enter the customer name and press Enter. See Figure 13.

Figure 13:
Faxing Files
from the (&)
Screen

```

16:17:40                                FAXING PROGRAM (06/28/00)                                08/15/00
-----
Action: ** FAX FILE **
Modem Type ?   Baud [      ]
Reliable ?
Phone #
Dialing Prefix ?
Network ?A

Acct: [      ] Dept: [      ]
Name: [      ]
Suite [      ]
Address [      ]
City [      ] St [      ] Zip [      ]-[      ]

FAX # (      ) -
Data File
File Name [      ] Vol. [V5 ]

----- * * S T A T U S * * -----

```

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- 3 At the Correct Customer prompt, type **Y**.
- 4 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 5 At the Fax Number Correct prompt, type **Y**. Type **N** to change it.
- 6 At the Does Fax Number Require 1+ prompt, type **N**. (You set up your phone number prefixes in the AutoComm program.)
- 7 In the File Name field, enter the name of the file to fax and press Tab.
- 8 In the Vol field, enter the volume serial where the file is located.
- 9 At the Ready To Fax prompt, type **Y**.
- 10 At the Change Modem Parameters prompt, type **N** to accept the parameters.
- 11 At the Enter Comments prompt, you can enter additional text to print on the cover sheet. To enter text, type **Y**. In the Comments field, enter up to 50 characters. If you do not completely fill the field, press Enter.
- 12 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 13 When the file is built, you are connected to the AutoComm program on your PC. The Sending to AutoComm message displays, then the Sending Fax Information message appears.
- 14 When the fax is sent, the Fax Was Successfully Transmitted Press Any Key prompt appears. Press Enter to return to the (&) screen.


Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Emailing Using Text-Based Software

You can email invoices, purchase orders, statements and files from the (&) screen. You can also email from the (G) screen and from the (B) screen. Or you can use the (F) screen to email.

Emailing Invoices from the (&) Screen

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.

Note: In eNsite Pro's Master Menu, double-click  to open the (&) screen.

- 2 In the Fax/Email field, type **E**.
- 3 In the Fax Type field, type **1**.

- 4 The cursor moves to the Invoice # field. At this point, you can enter the number of the invoice to email or specify another file name. To specify the invoice number, enter it and press Enter. Go to **Step 5**.

If the invoice is in a file other than P-MASTER, press Esc to move the cursor to the file field. Enter the correct file name and tab to the Vol field. Enter the volume serial where the file is located and press Enter. The cursor returns to the Invoice # field. Enter the invoice number and press Enter.

- 5 The invoice number displays, along with the Correct Ticket/Invoice prompt. If the displayed invoice is correct, type **Y**. To select another, type **N**.
- 6 The contact name appears at the bottom of the screen. At the Status Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 7 At the Formats Correct prompt, type **Y** if the formats are correct or type **N** to make changes to the formats.
- 8 At the Change Email Address prompt, if the email address is correct, type **N**. Type **Y** to change the email address.
- 9 At the Ready to Email prompt, type **Y**.
- 10 At the Enter Comments prompt, you can enter additional text to print in the body of the email. To enter text, type **Y**. The cursor moves to the Comments field. Enter any additional text, up to 50 characters, in this field. If you do not completely fill the field, press Enter. If you do not want to enter additional text, type **N**.
- 11 At the Change Subject prompt, type **Y** to enter information to display in the email's subject line. Type **N** to leave it blank.
- 12 After the email is sent, press Enter to return to the (&) screen.

Emailing Statements from the (&) Screen

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.
- 2 In the Fax/Email field, type **E**.
- 3 In the Fax Type field, type **3**.
- 4 In the Name field, enter the customer name and press Enter. To select the customer by account number, press Esc.
- 5 At the Correct Customer prompt, type **Y**.
- 6 At the Format/Fax Number Correct prompt, type **Y** if the format is correct. Type **N** to change it.

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- 7 At the Change Email Address prompt, if the email address is correct, type **N**. Type **Y** to change it.
- 8 In the Age By field, enter the age by date or press Tab to accept the default.
- 9 In the Cutoff By field, enter the cutoff date or press Tab to accept the default.
- 10 In the Age Date field:
 - To age receivables by invoice date, type **I**.
 - To age receivables by discount date, type **D**.
 - To age receivables by a date you select, type **U**.
- 11 At the Ready to Email prompt, type **Y**.
- 12 You can enter additional text on the fax at the Enter Comments prompt. To enter text, type **Y**. The cursor moves to the Comments field. Enter up to 50 characters. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding extra text.
- 13 At the Change Subject prompt, type **Y** to enter information to display in the email's subject line. Type **N** to leave the subject line blank.
- 14 After the email is sent, press Enter to return to the (&) screen.

Emailing Purchase Orders from the (&) Screen

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.
- 2 In the Fax/Email field, type **E**.
- 3 In the Fax Type field, type **2**.
- 4 The cursor moves to the P/O Numbers field. In the P/O Numbers field and the corresponding To field, you can enter the range of purchase orders to fax to the vendor. You can define this range by specifying a beginning purchase order number in the P/O Numbers field. Specify an ending P/O number in the corresponding To field.
- 5 At the Correct Vendor prompt, type **Y**.
- 6 At the Format/Fax Number Correct prompt, type **Y** to accept the default format. Type **N** to change it.
- 7 At the Change Email Address prompt, type **N** to accept the email address. Type **Y** to change it.
- 8 At the Ready to Email prompt, type **Y**.

- 9 You can enter additional text to the email at the Enter Comments prompt. This text prints in the body of the email. To enter text, type **Y**. The cursor moves to the Comments field. Enter any additional text, up to 50 characters, in this field. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding extra text.
- 10 At the Change Subject prompt, type **Y** to enter a subject line. Type **N** to leave it blank.
- 11 After the email is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the email. Emailing Invoices from the (&) Screen

Emailing Invoices from the (G) Screen

- 1 In the (G) screen, enter your order writer number.

Note: In the Ensite Pro Order Entry window, press Shift + F2 to open the (G) screen.

- 2 In the Action field, type **G**.
- 3 In the Transaction # field, enter the number of the invoice to email, and press Tab.
- 4 At the Correct Ticket prompt, type **Y**.
- 5 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 6 The email address displays. At the Change Email prompt, type **N** if the email is correct or type **Y** to change it.
- 7 At the Change Defaults prompt, type **N** if the format is correct. Type **Y** to change it.
- 8 You can enter additional text at the Enter Comments prompt. To enter text, type **Y**. In the Comments field enter up to 50 characters. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding extra text.
- 9 At the Ready to Email prompt, type **Y**.
- 10 The cursor returns to the Transaction # field. To return to the Action field, press Esc twice.

Emailing Statements from the (B) Screen

- 1 In the (B) screen, type **E** in the Action field.
- 2 In the Name field, enter the customer name and press Enter. You can enter up to 30 characters.
- 3 At the Correct Record prompt, type **Y**.
- 4 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.
- 5 At the Enter Comments field, type **Y** to enter additional text. Type **N** if you are not adding text.
- 6 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 7 At the Change Aging Date prompt, type **N** if the information is correct. Type **Y** to change it.
- 8 At the Change Email Address prompt, type **N** to accept the address. Type **Y** to change it.
- 9 At the Ready to Email prompt, type **Y**.
- 10 The email is sent. The cursor returns to the (B) screen's Action field.

Emailing Purchase Orders from the (F) Screen

- 1 In the (F) screen, type **E** in the Action field.


Note: In the Ensite Pro Purchase Order Entry window, click File, then click Text Based POs to open the (F) screen.

- 2 In the Current P/O # field, enter the purchase order number to email, and press Enter.
- 3 At the Correct P/O To Email prompt, type **Y**.
- 4 You can enter additional text at the Enter Comments prompt. To enter text, type **Y**. In the Comments field, enter up to 50 characters. If you do not completely fill the field, press Enter. Type **N** at the Enter Comments prompt if you are not adding extra text.
- 5 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.
- 6 At the Email Address prompt, enter an email address.
- 7 At the Change Default prompt, type **N** to accept the defaults. Type **Y** to change them.

- 8 At the Are You Sure prompt, type **Y**.
- 9 The cursor returns to the Action field in the (F) screen.

Emailing Files from the (&) Screen

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.

Note: In eNsite Pro's Master Menu, double-click  to open the (&) screen.

- 2 In the Fax/Email field, type **E**.
- 3 In the Fax Type field, type **4**.
- 4 In the Name field, enter the customer name and press Enter.
- 5 At the Correct Customer prompt, type **Y**.
- 6 At the Change Email Address prompt, type **Y** to change the address. Type **N** to accept it.
- 7 In the File Name field, enter the name of the file to send and press Tab.
- 8 In the Vol field, enter the volume serial where the file is located.
- 9 At the Ready to Email prompt, type **Y**.
- 10 At the Enter Comments prompt type **Y** to add extra text. Type **N** if you are not adding extra text.
- 11 At the Change Subject prompt, type **Y** to enter a subject line. Type **N** to leave it blank.
- 12 After the email is sent, press Enter to return to the (&) screen.

Figure 14:
Deleting in the
Monitor Screen

```

16:19:20                               AutoFax2 Monitor  REV. (07/03/00)                               08/15/00
-----
Action ? [D] (I=Inquiry, D=Delete, P=Purge, R=Resend, B=Back To &)
-----
L  Who  Date  Time  Limit      Request      S T Fax Number  E-Mail Address
==  ==  ==  ==  ==  ==  ==  ==  ==
1   08/15 12:32 151713-0 Invoice      I F 8174310956  GLENN@DDMS.COM
1 101 08/15 12:43 151713-0 Invoice      I E 8174310956  glenns@ddms.com
1 101 08/15 12:45 151716-0 Invoice      I F 8174310956

```

Monitoring Faxes and Emails

You can check the progress and status of an email or fax using the Monitor screen in the (&) screen. You can find out who sent the message, as well as the date and time it was sent. You can also request the fax number or email address to which it was sent. You can delete a fax or email, purge them, resend, or inquire.

There are four different status codes used in the monitor screen. If the Status field is blank, nothing has been sent. A status of I means the message or document has gone on to AutoComm and is processing. An S means the email was successfully sent or the fax has gone to Winfax. An E in the Status field indicates an error.

In the (&) screen, choose the [7] Monitor action code. You can view the messages sent or perform other actions.

Deleting in the Monitor Screen

To update the Monitor screen, type I in the (&7) screen's Action field.

- 1 In the (&7) screen, type **D** in the Action field. See Figure 14.
- 2 At the X to Mark for Deletion prompt, type **X** next to the message(s) to delete. Press Enter.
- 3 At the Are You Sure prompt, type **Y**. The documents are deleted. The cursor returns to the Action field.

Purging from the Monitor Screen

Purging lets you delete a group of emails by the sent date.

- 1 In the (&7) screen, type **P** in the Action field
- 2 The Purge from X to X prompt appears. (X stands for the date range.) Enter the beginning date in the Purge From field. Enter the ending date in the To field.
- 3 At the Are You Sure prompt, type **Y**. The documents are deleted. The cursor returns to the action code field.

Resending from the Monitor Screen

You can also resend documents from this screen that may have been sent successfully the first time.

- 1 In the (&7) screen, type **R** in the Action field.
- 2 At the X to Mark to Resend prompt, type **X** next to the message(s) to resend. Press Enter.
- 3 At the Are You Sure prompt, type **Y**. The document is sent. The cursor returns to the Action field.

Mass Faxing and Mass Emailing



You can fax or email a file to multiple fax numbers or email addresses. For example, you can fax or email a promotional flyer to the customers who use a certain product. You can also fax or email letters to customers or vendors. With AutoComm, you can create this file on your PC and mass fax or email it to your customers.

You can create a file on your PC to fax or email to your customers. Creating a fax file on your PC lets you utilize the many advantages your PC has to offer. For example, you can create a flyer complete with graphics to catch your customer's attention.

Creating a Mass Fax Phone Number and Email File

To mass fax files, you must first create a file with a list of the fax numbers and email addresses that the fax or email will be sent to. You can create this file on your PC, in the DDMS Word Processor, or through the (+Z) Setup Formats for Reports screen. DDMS has standard formats. The CPH# format is the fax phone number list and the CEML format is the email address list.

To create the phone number file through the word processor:

- 1 Double-click , then double-click .
- 2 In the (+Z) Master Utilities screen, at the Enter Utility Type prompt, type **B**.
- 3 In the Word Processor, open a new file. (For instructions, go to www.ddms.com/support/doc/ver4doc.htm.)
- 4 You must use a specific format in the phone number file. For each fax number, type the area code and phone number. You can also enter 30 characters of text after column number 41 for each fax number.

Each fax number must be on a new text line. For example, suppose you want to send the data file to the following four fax numbers: (817) 432-6678, (213) 950-4365, (214) 534-9988, and (212) 656-1134. Your phone number file would look like the following:

```
8174326678
2139504365
2145349988
2126561134
```

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Creating an email list works the same way as a fax list. For each email address, type the email address. You can also enter 30 characters of text after column number 41 for each email address.

Each email address must be on a new text line. Your email file would look like the following:

```
joesmith@ddms.com  
brendajones@ddms.com  
mikesmith@ddms.com
```

- 5 Save the file under a name you can easily remember when specifying the phone number file.

Creating the Fax File Name

After you have created your fax and email file on your PC and created your phone number file, you must go to the DDMS Word Processor and create a file that contains the name of the PC fax file.

Use the following instructions to create a mass fax file on your DDMS system:

- 1 Go to the DDMS Word Processor. You must create a one line file to identify the name of the PC file. When you open the DDMS Word Processor, select the [A] Edit a Document action code.
- 2 When the Enter Document Name and Unit Number prompt appears, enter the name of this file. For example, you may want to name this file MASSFAX. (You can reuse this file next time you mass fax by changing the first line of the file to include the PC file name.) Press Tab and then enter the unit number.
- 3 When the cursor moves to the first line of the word processor file, you must enter the name of the file you want to fax with the complete DOS path to file from the AUTOCOMM PC. For example, you might type C:\documents\massfaxpromo.txt. The file does not have to reside on the AutoComm PC. If the PC is connected to a LAN you can pull it from any machine on that LAN as long as it is in a shared folder. For example, you might enter: //testmachine/shared/massfax.txt.
- 4 After you have created the DDMS Word Processor file, you are ready to begin the mass fax or email.

Mass Faxing

Once you have created a phone number file and fax file, you can mass fax.

- 1 In the (&) screen, type **5** to select the [5] Mass Fax a file function.
- 2 The Mass Fax subscreen opens. At the Enter File Name To Transmit message, enter the name of the data file to fax. Using the example above, you would type **MASSFAX**. If you do not complete fill the field, press Tab.
- 3 In the Vol field, enter the volume serial where the data file is located and press Tab.
- 4 At the Enter Phone Number File message, enter the name of the file of phone numbers or email address to fax the data file to. If the file name is fewer than 10 characters, press Tab.
- 5 In the Vol field, enter the volume serial where the phone numbers file is located, and press Tab.
- 6 At the Ready To Fax prompt, type **Y**.
- 7 At the Change Modem Parameters prompt, type **N**.
- 8 After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Mass Emailing

Once you have created a phone number file and fax file, you can mass fax or email files.

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.
- 2 In the (F)ax/(E)-Mail field, type **E**.
- 3 The cursor returns to the Fax Type field. Type **5** to select the [5] Mass Fax a file function.
- 4 In the Mass Fax subscreen, the Enter File Name To Transmit message displays. Enter the name of the data file to fax. Using the example above, you would type **MASSFAX**. If the file name is fewer than 10 characters, press Tab.
- 5 The cursor moves to the Vol field. Accept the default volume serial by pressing Tab, or enter the volume serial where the data file is located and press Tab.

- 6 At the Enter Phone Number File message, enter the name of the file of phone numbers or email address to fax the data file to. If the file name is fewer than 10 characters, press Tab.
- 7 In the Vol field, enter the volume serial where the phone numbers file is located, and press Tab.
- 8 At the Ready To Email prompt, type Y.
- 9 After the message is sent, press Enter to return to the (&) screen.

Batch Faxing and Emailing Statements

You can send statements automatically by using the batch faxing and emailing feature. Once you begin a batch fax or email, the system sends one fax or email at a time until the entire batch has been sent.

To batch fax or email, you must create a special batch file.

Creating a Batch File

You can create a batch file in the (+X) Manual Report Executor Selector screen. The file you use to batch fax must include the text to fax, repeated once for each fax number. DDMS created a default batch faxing format for statements named CFBAT. The CFBAT file is designed to create a file of statements to be faxed. The format for batch emailing is CFBAT. Set limits in the (+X) screen.

To access the (+X) screen:

- 1 Double-click



- 2 In the Keyop Menu, double-click



- 3 In the (+) Special Programs screen, type X in the Enter Program Request field.

Batch Faxing from the (&) Screen

Once you have created the batch file, you can batch fax.

- 1 In the (&) screen, type 6.
- 2 In the Batch Fax subscreen, the Enter File Name To Transmit message appears. Enter the name of your batch file. If the name you enter does not completely fill the field, press Tab.

- 3 In the Vol field, enter the volume serial where the batch file is located, and press Tab.
- 4 At the Ready To Fax prompt, type **Y**.
- 5 At the Change Modem Parameters prompt, type **N**.
- 6 After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax.

Batch Faxing from the (TR) Screen

- 1 In the (A) screen, type **F** in the Hold field. This keeps the invoices from automatically printing during the (TR)[B] and (TR)[A].
- 2 In the (TR) screen, type **M** in the Report field.
- 3 At the Process Fax, Email, or All Invoices F/E/A prompt, type **F**.
- 4 In the Pick# field, enter the range of pick numbers to fax.
- 5 At the Include, Exclude, or Only Furniture Orders I/E/O prompt:
 - To include furniture orders, type **I**.
 - To exclude furniture orders, type **E**.
 - To include only furniture orders, type **O**.
- 6 Enter the route in the Route # field.
- 7 In the Sort Order field, type the two ways to sort the invoices.
- 8 In the Loc field, type the location.
- 9 At the Are You Sure prompt, type **Y**.
- 10 The invoices are faxed.

Batch Emailing

Once you have created the batch file, you can batch email.

- 1 In the (&) screen, with the cursor in the Fax Type field, press Esc.
- 2 In the (F)ax/(E)-Mail field, type **E**.
- 3 In the Fax Type field, type **6**.
- 4 In the Batch Fax subscreen, the Enter File Name To Transmit message appears. Enter the name of your batch file. If the name you enter does not completely fill the field, press Tab.
- 5 In the Vol field, enter the volume serial where the batch file is located, and press Tab.

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- 6 At the Ready to Email prompt, type **Y**.
- 7 After the email is transmitted, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the email.

Batch Emailing from the (TR) Screen

- 1 In the (A) screen, type **E** in the Hold field. This keeps the invoices from automatically printing during the (TR)[B] and (TR)[A].
- 2 In the (TR) screen, type **M** in the Report field.
- 3 At the Process Fax, Email, or All Invoices prompt, type **E**.
- 4 In the Pick# field, enter the range of pick numbers to email.
- 5 At the Include, Exclude, or Only Furniture Orders I/E/O prompt:
 - To include furniture orders, type **I**.
 - To exclude furniture orders, type **E**.
 - To include only furniture orders, type **O**.
- 6 Enter the route in the Route # field.
- 7 In the Sort Order field, type the two ways to sort the invoices.
- 8 In the Loc field, type the location.
- 9 At the Are You Sure prompt, type **Y**.
- 10 The invoices are emailed.

