

*Installing
AutoCommTM II*



June 2009 Rev.

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Understanding AutoComm™ II

AutoComm II makes faxing and emailing fast and easy. You can communicate directly from your DDMS system to any fax machine or computer. Simply connect your system to a stand alone machine running AutoComm II software. Choose the information to fax or email and let AutoComm II do the rest.

As with the previous versions of AutoComm, 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 II sends faxes and emails through your mail server. AutoComm II also comes with the standard formats that you've used in the past.

With AutoComm II:

- Emails are authenticated.
- WinFax is no longer necessary. No need to buy extra software!
- Uses Microsoft® Fax Services included with your Windows® software. (You may need to install Microsoft Fax Services from your Windows CD.)
- Text can now be viewed as text, .pdf, or.html files.
- No longer uses TBLNetComm. No more setting up ports!

Using the appropriate application screen, you can send tickets, invoices, account statements, and files to your customers. You can also fax or email purchase orders to your vendors.

For instructions on faxing and emailing with AutoComm II, see the handout *Using AutoComm II* on our website at www.ddms.com.

AutoComm II Requirements

Before using AutoComm II, you must meet the following requirements:

- Install AutoComm II on a stand alone machine.
- Have a dedicated phone line (no incoming calls).
- Be on Windows XP Pro or 2003 Server.
- Set up dialing preferences in Microsoft Fax Services. (You may need to install Microsoft Fax Services from your Windows CD.)
- Set the Work Unit folder to be shared.
- Create a log on for a specific user account that has enough privileges to create files, read/update AF-MASTER on the DDMS server, send faxes, and send emails.

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- If McAfee is running on the AutoComm II machine, On-Access scan must be disabled for the email to work.

Getting Started

The following is a checklist of what needs to be set up before using AutoComm II for faxing and emailing. For specific steps for setup, refer to that heading.

- 1 Install AutoComm II on a stand alone machine. See **Installing AutoComm II**.
- 2 Define dialing rules in Microsoft Fax Services. See **Defining Dialing Rules**.
- 3 Start AutoComm II.
- 4 Set up AutoComm II server information. See **Setting Up Your Server**.
- 5 Set up the (L6T) screen. See **Setting Up the (L6T) Screen**.

Note: If you previously used AutoComm, the (L6T) screen should already be set up.

- 6 Set up AutoComm II options. See **Setting AutoComm II Options**.

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DDMS strongly recommends that you install AutoComm II on a stand alone machine separate from your DDMS server but on the same network as your server. This prevents slow processor problems and issues with TIF (.tif) file associations. This also allows sharing of the Work Unit folder.

Install AutoComm II from your DDMS software CD.

- 1 Insert the CD into your CDROM drive.
- 2 When the AutoRun menu opens, click Install Other Software.
- 3 Click Install AutoComm II and follow the prompts on your screen.

Defining Dialing Rules

Before using AutoComm II, you must define dialing rules. For example, if the system must dial a 9 to reach an outside line, you must set that as the rule. To do this, you must have Microsoft Fax Services installed.

- 1 On the PC on which you installed AutoComm II, click Start.
- 2 Highlight Settings then click Control Panel.
- 3 Double-click Phone and Modem Options.

- 4 Use the Dialing Rules tab to set up the dialing options for AutoComm II. For example, if the system must dial a 9 to reach an outside line, you define that in this dialog box.
- 5 When finished, click OK.

Setting Up Your Server

There are three steps to setting up your server for AutoComm II. You must set up your Work Unit folder to be shared, set up log on privileges, and then set the Work Unit folder as the folder for which AutoComm II information is stored.

Sharing the Work Unit Folder

AutoComm II saves information to your work unit on the server. You must set the folder to be shared.

- 1 First, you need to know the volume serial in which your Work Unit resides. Go to the (LØ) Parameters Screen and verify the volume serial for the Work Unit, W2, for example.
- 2 On your server, set the Work Unit folder to be shared. Using Windows Explorer, go to to the DDMS folder and find the Work Unit folder.
- 3 Right-click the folder and select Sharing and Security.
- 4 Go to the Sharing tab and click Share This Folder.
- 5 Click OK. If you have any questions, please see your Network Administrator.

Creating a Log On

You can create a log on account so that the specific user account has enough privileges to create files, read/update AF-MASTER on the DDMS server, send faxes, and send emails.

Note: The log on account *must* be created on the DDMS server (on which AutoComm II is installed).

- 1 From the Windows Start Menu, click Settings then Control Panel.
- 2 Double-click Administrative Tools.
- 3 Double-click Services.
- 4 Highlight AutoComm II then right-click and select Properties.
- 5 Click the Log On tab.
- 6 Click This Account and enter the user name and passwords for this machine.



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- 7 When finished, click OK. If you have any questions, please see your Network Administrator.

Setting Server Information

Before using AutoComm II, you must set the folder in which to save AutoComm II information. AutoComm II stores information in the AF-MASTER file in the DDMS Work Unit.

Note: If you make changes to AutoComm II configuration, you must restart AutoComm II to save the settings.

- 1 Double-click . The icon shows a globe with a cursor pointing to it, and the text "Autocomm II Administration" below it.
- 2 Click Server Information in the Module Tasks menu (on the left side of the screen).
- 3 To set the AutoComm Server Folder, click  to query.

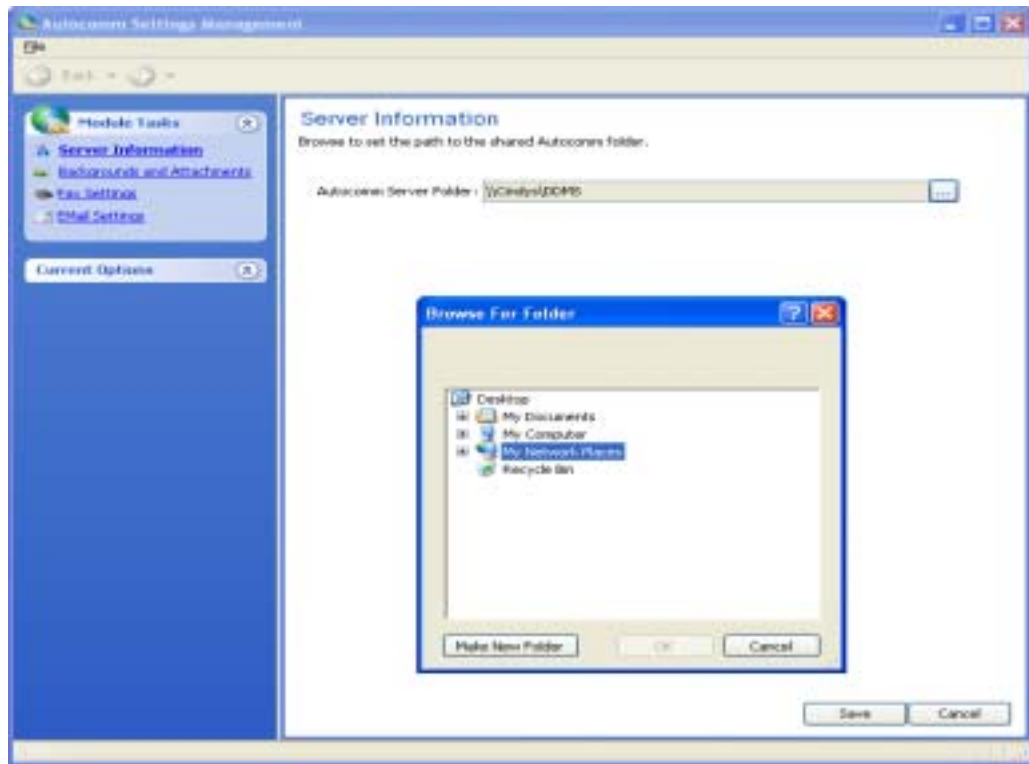


Figure 1: Setting Up Your Server for AutoComm II

- 4 The Browse for Folder dialog box opens. Double-click My Network Places. See Figure 1.
- 5 You can navigate to the DDMS server and find the Work Unit folder. Highlight the Work Unit folder and click OK.
You can also enter the path name, for example \\ddms_server\sr.
- 6 Click Save. (If you don't save, the system prompts you to save.)

Setting Up the (L6T) Screen

Before faxing from your DDMS System, you must set up the (L6T) screen on your DDMS server. In the (L6T) screen, set up the standard formats that come with AutoComm II.

Note: If you previously used AutoComm, the (L6T) screen should already be set up.

- 1 Go to the (L6T) screen and tab to the Phone Line field.
- 2 Type **DY**. See Figure 2.
- 3 Tab to the Logon ID field and type **AUTOCOMM**.
- 4 Tab to the Network field and type **A**.
- 5 In the Statements field, accept the default, **CFSTA**, or enter another statement format. (We recommend that you write down the format that you enter here for future reference.)

Figure 2: 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  :
Script :                               Id         :
Fax Vol:                               Code       :
                                         Network   :A
                                         -----
                                         Formats
                                         Statements :CFSTA
                                         Invoice     :CI
                                         Pick-Ticket:CT
                                         P/O       :CFPO
                                         [ Fax ]   [Email]
                                         Calls     :
                                         Meters   :
                                         Renewals  :
=====
Location #
1
2
3
4
5

```

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- 6 In the Invoice field, accept the default, CI, or enter another invoice format. (We recommend that you write down the format that you enter here for future reference.)
- 7 In the Pick Ticket field, accept the default, CT, or enter another pick ticket format. (We recommend that you write down the format that you enter here for future reference.)
- 8 In the P/O field, enter a purchase order format. (We recommend that you write down the format that you enter here for future reference.)

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.

- 9 When finished, press Enter.

Setting AutoComm II Options

Setting options in AutoComm II is easier than ever with the new user-friendly interface that allows information to be organized and entered instantaneously.

This section covers creating files for faxing. You can add backgrounds and attachments as well as set other options for faxing and emailing.

Note: If you make changes to AutoComm II configuration, you should restart AutoComm II before using it.

Creating a Fax File

When faxing with AutoComm II, you can only fax TIF files. If you created a file in Microsoft Word, for example, you must convert that file to a TIF file. Remember, if you change the Word file, you must convert it to a TIF file again before attempting to fax. If you don't, the system faxes the previous TIF file you created.

Note: If you have customized background images or overlays located in the previous AutoComm program, you must copy them into AutoComm II in the C:\Program Files\eCommerce Industries, Inc\AutoComm II\Background Images folder.



- 1 Open the file as you normally would. For example, open the file in Word, if that's where it was created.
- 2 Click File, then click Print.

- 3 In the Print dialog box, use the drop down arrow in the Name box to select the Fax printer.
- 4 Click the Print to File box.
- 5 Click OK.
- 6 The Print to File dialog box opens. To save the file to a TIF file:
 - 6.1 Make sure you are saving in the same folder as your original file.
 - 6.2 In the Save As Type box, use the drop down arrow to select All Files.
 - 6.3 In the File Name box, enter the file name the same as the original document except use the extension .tif. For example, if the original Word doc was Fax.doc, type Fax.tif.
 - 6.4 Click OK.
- 7 The TIF file for faxing is now ready.

Adding Backgrounds and Attachments

You can specify a background for the format code and set up attachments to send with the format code. These backgrounds and attachments can be used with emailing or faxing. Background files are BMP (.bmp) files that contain header text, for example, name and date. Attachment files can be any file type unless you are faxing. Files attached for faxing must be TIF (.tif) files.

- 1 In the AutoComm Setting Management window, click Backgrounds and Attachments under the Module Tasks menu.
- 2 In the Format Code box, enter the DDMS Format Code such as CT, CFPO, and so on. (These are the formats you set up in the (L6T) screen.)
- 3 In the Background Image Path box, you can select a BMP file to use as the background for this format. Standard images are located in the **C:\Program Files\eCommerce Industries, Inc\AutoComm II\Background Images** folder.

Click the Background Image Path box. The  (query) button appears, as shown in Figure 3. Click  to browse and select the .bmp file. When you have selected the BMP file, click Open.

- 4 You can send a separate attachment with your email. (This attachment does not affect the format that you set in the Format Code box.) You must specify the attachment in the Attachment Path box if you select this option.

To send a separate attachment, click the Send As Attachment check box.

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- 5 To send a separate attachment, select the file to attach by clicking the Attachment Path box. The **...** button appears. Click **...** and select the file (.txt, .pdf, .doc, or .tif) to attach. Click Open.

Note: Although you can select different file types, *if you are faxing*, you must attach a TIF file. See the heading **Creating a Fax File**.

- 7 Continue to set up as many lines as needed. You must press Enter to save the line and move to the next line.

Note: To remove a line, select that line and click Remove Items under the Current Options Menu on the left side of the window.

- 8 When finished setting up background images and attachments, click Save.

Adding Fax Settings

To use a cover sheet or logo when faxing, you must set up fax settings.

- 1 To set fax settings, click Fax Settings under the Module Tasks menu.
- 2 In the Location box, enter the G/L location number.

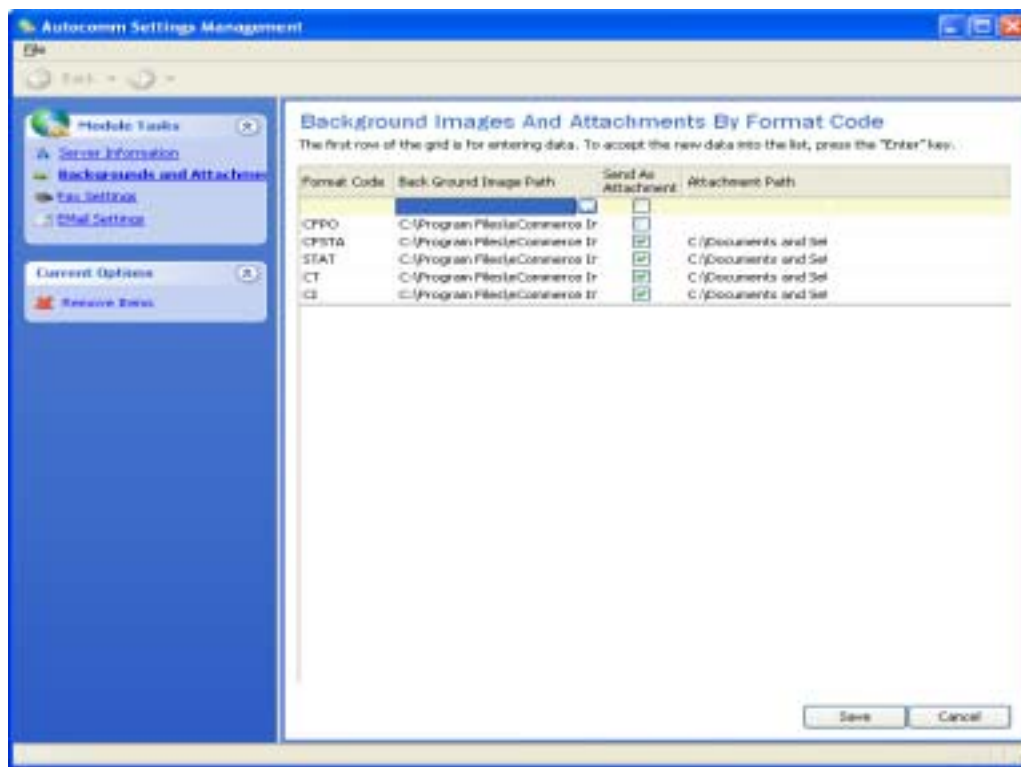






Figure 3:
Backgrounds
and
Attachments
Window

- 3 Click the Coversheet Path box to add a cover sheet. The  button appears, as shown in Figure 4. Click  and select a cover sheet file (.cov). Click Open.
- 4 You can attach a logo file if you are sending your email as a PDF file attachment. (You cannot attach a logo with any other function.) To specify a logo file for your PDF email attachment, click the Logo Path box. The  button appears. Click  and select the .bmp image. Click Open.
- 5 Press Enter to save this information. Continue entering as many lines as needed.

Note: To remove a line, select that line and click Remove Items under the Current Options Menu on the left side of the screen.

- 6 Click Save.

Adding Email Settings

To use AutoComm II when emailing, you must link AutoComm II to your email server.

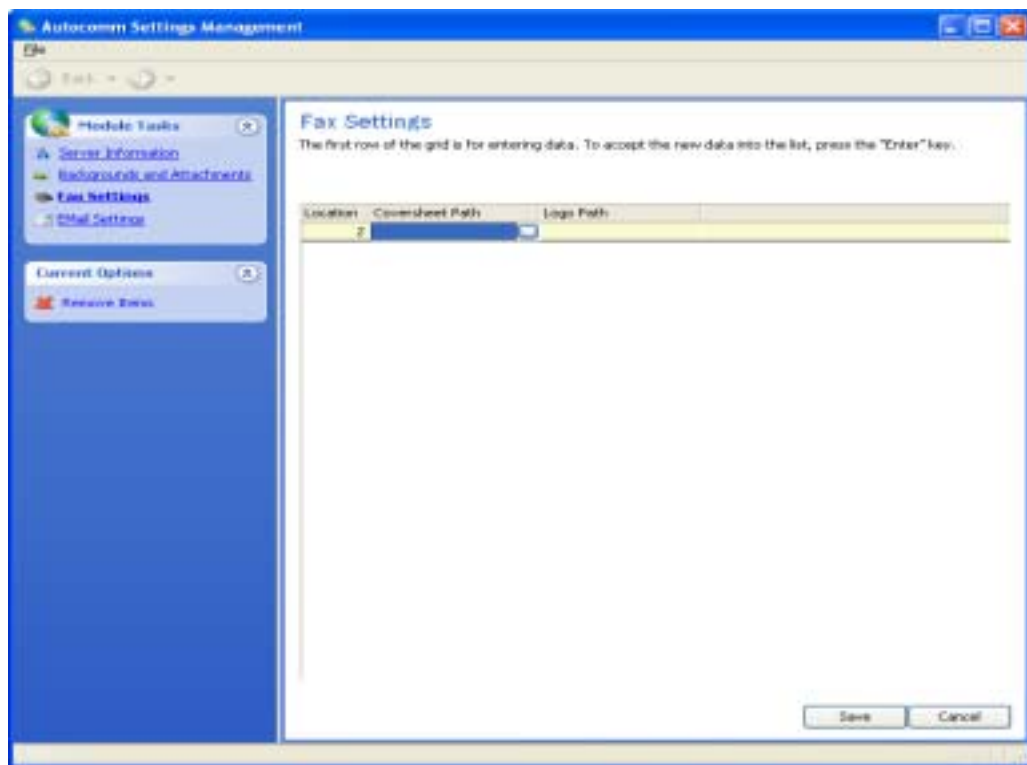
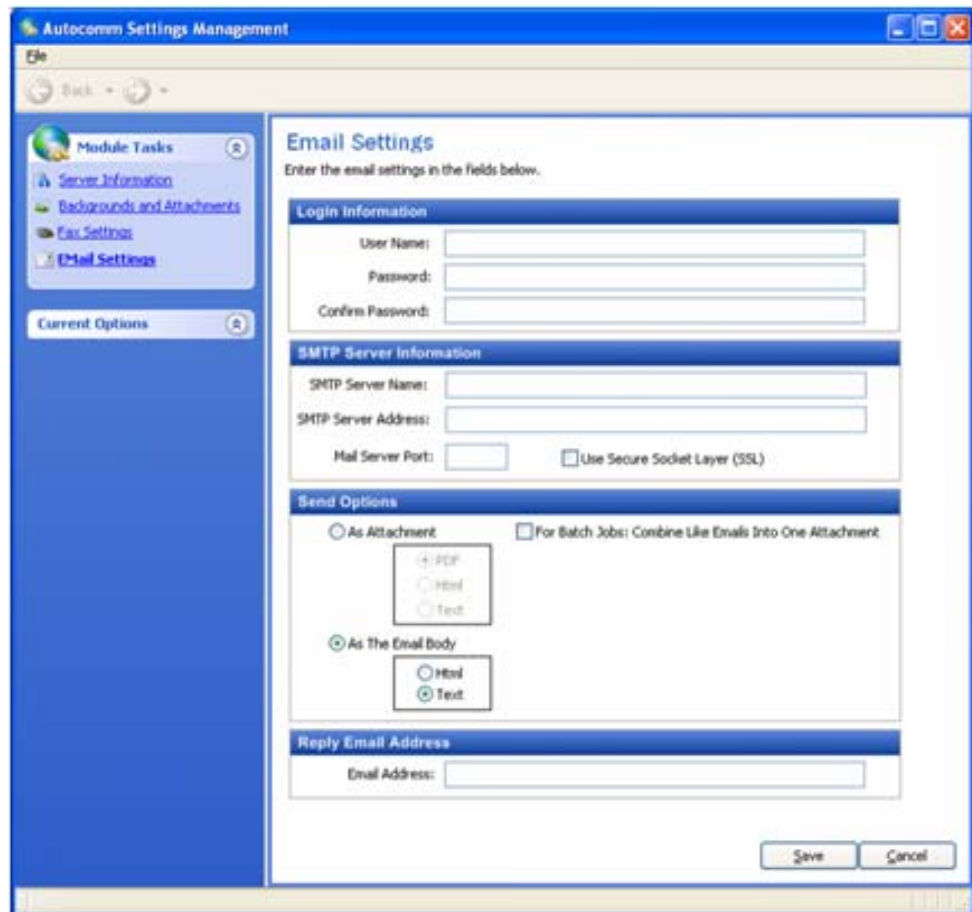


Figure 4: Fax Settings Window

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- 1 Click Email Settings under the Module Tasks menu. See Figure 5.
- 2 Click User Name and enter your user name. (This is your email user name, not your PC logon.)
- 3 In the Password box, enter your password.
- 4 In the Confirm Password box, enter your password again.
- 5 In the SMTP Server Name box, enter the name of your email server.
- 6 In the SMTP Server Address box, enter the IP address of the email server.
- 7 In the Mail Server Port box, enter the port number.



The screenshot displays the 'Autocomm Settings Management' application window. On the left, a 'Module Tasks' sidebar lists 'Server Information', 'Backgrounds and Attachments', 'Fax Settings', and 'Email Settings', with 'Email Settings' selected. Below this is a 'Current Options' section. The main content area is titled 'Email Settings' and contains the following sections:

- Login Information:** Three text input fields for 'User Name', 'Password', and 'Confirm Password'.
- SMTP Server Information:** Three text input fields for 'SMTP Server Name', 'SMTP Server Address', and 'Mail Server Port'. A checkbox labeled 'Use Secure Socket Layer (SSL)' is located to the right of the 'Mail Server Port' field.
- Send Options:** Two radio button options: 'As Attachment' and 'As The Email Body'. Under 'As Attachment', there are three radio buttons: '+ PDF', 'HTML', and 'Text'. Under 'As The Email Body', there are two radio buttons: 'HTML' and 'Text', with 'Text' selected. A checkbox 'For Batch Jobs: Combine Like Emails Into One Attachment' is also present.
- Reply Email Address:** A single text input field for 'Email Address'.

At the bottom right of the window, there are 'Save' and 'Cancel' buttons.

Figure 5: Email Settings Window

- 8** Before selecting the Use Secure Socket Layer check box, check with your email provider. Your email provider may require a SSL.
- 9** In the Send Options boxes, you can select to send your emails as attachments or as the email body.

If you select As Attachment, you can select to send the email as a PDF, HTML, or Text document. Go to **Step 10**.

If you select As The Email Body, you can select the body of the email to be HTML or Text. Go to **Step 11**.
- 10** To send more than one statement to the same email address, select For Batch Jobs Combine Like Emails Into One Attachment. If you attach multiple statements to this email, the system bundles them into one attachment. For this feature to work, you must have selected As Attachment.
- 11** In the Email Address box, enter the return email address.
- 12** Click Save.