

*Using
AutoComm™ II*



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Using AutoComm II

You can send emails and faxes from the Order Entry, Purchase Order Entry, and Accounts Receivable windows in Ensite 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.

Note: You must have AutoComm II open before faxing or emailing.




For more information on AutoComm II, see the handout *Installing AutoComm II* on our website at www.ddms.com.

Faxing in Ensite Pro

You can fax invoices, purchase orders, statements, and files from several windows in Ensite Pro. You can fax from the O/E History window, the P/O History window, and the A/R History window. You can repeat the following steps in these windows. For example, to fax statements, open the A/R History window and fax statements. In this example, we are faxing invoices from the O/E History window.

Note: You must have AutoComm II open before faxing or emailing.

Faxing Invoices from Order Entry History

- 1 Double-click . 
- 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. Enter the name of the person to whom you are faxing.
- 5 In the Fax boxes, enter the ten-digit fax number.
- 6 Check the Dial One box if the fax number is long distance. Clear it if the fax number is local.
- 7 Click the Format box to change the format. The default format displayed in this box comes from the (L6T) screen.
- 8 To change the subject line text, click the Subject box and enter the new text.

- 5 In the E-Mail box, enter the email address to use.
- 6 Click the Format box to change the format. The default format displayed in this box comes from the (L6T) screen.
- 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 finished, click OK to send the email.

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 1.
- 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 2. Go to **Step 3**.

Figure 2: 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 * * -----

```

Using AutoComm II

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.
- 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 dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 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 II 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. See **Monitoring Faxes and Emails**.

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 3.
- 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.
- 5 At the Does Fax Number Require 1+ prompt, type N. (You set up your dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 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.

Figure 3: 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

```

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. See **Monitoring Faxes and Emails**.

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 4. 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 dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 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.

Figure 4: 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 * * -----
```

- 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**.
- 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. See **Monitoring Faxes and Emails**.

Figure 5: 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

```

Faxing Invoices from the (G) Screen

- 1 In the (G) screen, enter your order writer number.
- 2 In the Action field, type F. See Figure 5.
- 3 In the Transaction # field, enter the number of the invoice to fax and press Enter.
- 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. (You set up your dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 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.

Figure 6: 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 #
    
```

Faxing Statements from the (B) Screen

- 1 In the (B) screen, type **F** in the Action field. See Figure 6.
- 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 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 **N**. (You set up your dialing rules in Microsoft® Fax Services when setting up AutoComm II.)

**Figure 7: 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

```

- 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 7.
- 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**. (You set up your dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 8 At the Are You Sure prompt, type **Y**.
- 9 The cursor returns to the Action field.

Figure 8: 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 * * -----
```

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 8.
- 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 dialing rules in Microsoft® Fax Services when setting up AutoComm II.)
- 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 II program on your PC. The Sending to AutoComm II 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. See **Monitoring Faxes and Emails**.

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.
- 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. To not 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.
- 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. 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**.

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- 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. See **Monitoring Faxes and Emails**.

Emailing Invoices from the (G) Screen

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

Emailing Purchase Orders from the (F) Screen

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

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- 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.
- 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.

Monitoring Faxes and Emails

You can check the progress and status of an email or fax using the Monitor option 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 , purge, resend, or inquire about a fax or email.

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 to AutoComm II and is processing.
- An S means the email was successfully sent or the fax has gone to Microsoft Fax Services.
- 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

- 1 In the (&7) screen, type **D** in the Action field.
- 2 The X to Mark for Deletion prompt appears, shown in Figure 9. Type **X** next to the message(s) to delete and 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.

- 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.

Figure 9:
Deleting in the
Monitor Screen

```

15:36:40                               AutoComm Monitor  REV. (06/13/03)                               07/16/07
-----
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
==  ==  ==  ==  ==  ==  ==  ==  ==  ==
2  202  03/05  09:25      2694 Pur. Order  E
2  202  07/18  14:22      2676 Pur. Order  F
1  202  04/25  11:13      2659 Pur. Order  E 8174315290
1  202  04/25  11:32      2662 Pur. Order  E 8174315290
1  202  04/25  13:57      2662 Pur. Order  E 8174315290
1  202  04/25  14:32      2662 Pur. Order  E 8174315290
2  202  04/26  09:13      2666 Pur. Order  E
1  202  04/26  09:16      2659 Pur. Order  E 8174315290
1  221  03/26  11:46          936 Statement  F 6172681291
1  210  03/30  14:29    10001-0 Invoice  F 1111111111
1  210  03/30  14:40    10001-0 Invoice  E 1111111111  a
1  202  08/30  11:47      2679 Pur. Order  F
1           03/30  14:32      936 Statement  F 2345678907
1           03/30  14:35      123 Pur. Order  F 9728769807
1           03/30  14:43      936 Statement  E 2345678907  mary@yahoo.com
1           03/30  14:45      123 Pur. Order  E 9728769807
1           03/31  11:17      936 Statement  E 2345678907  mary@yahoo.com
"X" to Mark for Deletion

```

- 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. With AutoComm II, 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 customers' 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 to which to send the fax or email. 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) screen, type **B** then 7.
- 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, 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
```

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 could 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 to fax with the complete DOS path to file from the AUTOCOMM II PC. For example, you might type C:\documents\massfaxpromo.txt. The file does not have to reside on the AutoComm II 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

- 1 In the (&) screen, type 5 to select the [5] Mass Fax a file function.

Using AutoComm II

- 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 completely 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. Refer back to the heading **Monitoring Faxes and Emails**.

Mass Emailing

- 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 named CEBAT. The CEBAT file is designed to create a file of statements to be emailed.

You 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. Refer back to the heading **Monitoring Faxes and Emails**.

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] functions. (This field works with both statements and invoices.)
- 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, press Tab to move to the Loc field.
- 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.
- 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. Refer back to the heading **Monitoring Faxes and Emails**.

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] functions. (This field works with both statements and invoices.)
- 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.