



Serialized Faxing and E-mailing



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Serialized Faxing and E-mailing

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Understanding Serialized Faxing and E-mailing

Previously, you used a batch method to fax meter reading requests to a range of customers. A new enhancement lets you fax and e-mail not only meter readings, but contract renewals, and service workorders. You can set up contact information using the graphical Contacts window or the new text-based Contact Fax & E-Mail screen.

This new screen lets you maintain a list of contact information. To access the Contact Fax & E-Mail screen in the text-based system, type " (quotation marks) from the DDMS Master Menu. See Figure 1. To access the graphical Contacts window, from the eNsite Pro Master Menu, click the Databases menu and click Contacts. To use this new feature, you must be set up and authorized to use the AutoComm module.

Note: Instructions for setting up and using AutoComm are included in the *AutoComm* handout which is available via the Internet at www.ddms.com/support/doc/miscdoc.htm.

By adding, changing, and deleting information, you can easily manage multiple contacts for your customers and serialized databases. You can have multiple contact types. For example, you can e-mail a meter reading to one contact, while e-mailing another contact a contract renewal. You can also set up contacts within departments: one for each sales, accounting, and human resources departments, for example. This new feature also lets you mass add contacts from your customer files.

Figure 1:
The
Contact Fax &
E-Mail Screen

```

15:16:59          CONTACT FAX & E-MAIL  Rev. (03/29/01)          06/18/02
=====
Action Code [I] (A=Add, C=Change, D=Delete, I=Inquiry, M=Mass Add)
=====
Area (_) (1=Customer, 2=Machine, 3=Salesperson/Tech, 4=Vendor)

Name      : _____

System   : _____ Sub   : _____ Type   : _____

Serial   : _____ Item # _____ Co: _____

-----

Contact  : _____

E-Mail   : _____
          : _____

Fax      #____-____-____ Phone #____-____-____ Ext. #____ F=Fax, E=E-Mail (F/E) : _

URL      : _____

=====

```

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Note: The Delete and Mass Add functions require a password before you can continue. The Delete password is set in the Delete field in the (LA) Customer and A/R Parameters screen. The Mass Add password is set in the Reindex field in the (LA) screen.

Once you set up the contact's fax and e-mail information, you can easily choose the best way to electronically transfer documents throughout the system. For example, you can now fax or e-mail meter readings, contract renewals, purchase orders, invoices, and statements to multiple contacts from within the Serialized application, the (F) Purchase Order Entry screen, the (G) Order Entry screen, and the (B) Accounts Receivable Posting screen, as well as their graphical versions. You can also easily fax or e-mail forms from the P/O History, A/R History, O/E History graphical windows.

Note: Contact information is stored in the CONTACT file.

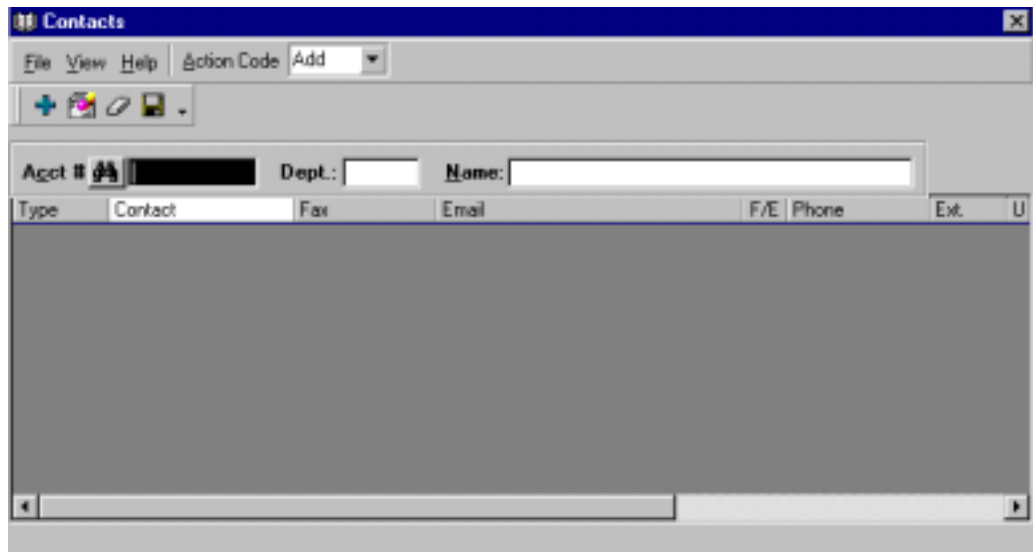
Setting Up Contacts



Use the following instructions:

Note: The default for the customer fax number and e-mail address comes from the C-REMARKS and C-INFO files.

- 1 From the eNsite Pro Master Menu, select the Contacts database by clicking the Databases menu and selecting Contacts, or you can type **Ctrl +N**. The Contact window opens, displaying the customer contact window, as shown in Figure 2.

Figure 2: The Contacts Window



- 2 At this point, you can set up customers, technicians, and machines.
 - To set up customers, select the customer for which you are adding a contact.
 - To set up technicians, click the View menu and select Salesperson to view the salesperson contact window. Then select the salesperson or technician for which you are adding a contact.
 - To set up machines, click the View menu and select Serialized to view the serialized contact window. Then select the machine for which you are adding a contact.
- 3 Once you have selected the customer, technician, or system, select Add in the Action Code list box, or click .
- 4 You can use the Type through URL boxes to enter information for this contact. Enter your response according to the following:
 - **Type:** In this box, enter the type of contact you are adding. For example, if this contact is in the accounting department you might type Acct. This box allows you to enter a small description of the contact.
 - **Contact:** In this box, enter the name of the contact.
 - **Fax:** In this box, enter the fax number you want to use with this contact.
 - **Email:** In this box, enter the email address you want to use with this contact.
 - **F/E:** This box allows you to specify a default for this contact. If you set this box to F, the system defaults to fax documents to this contact. If you set this box to E, the system defaults to email documents to this contact.
 - **Phone:** In this box, enter the phone number for this contact.
 - **Ext:** In this box, enter the phone number extension for this contact, if any.
 - **URL:** In this box, enter the web site address for the contact or company, if any.
- 5 After you enter the information in each box, click .
- 6 To add another contact, press Enter.

Mass Adding Contacts

You can mass add contacts using the Contact Fax & E-Mail screen. When you mass add, the system adds all the records from the file for the category you



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specify. For example, when mass adding vendors, the system adds all the records stored in the C-MASTER file. When mass adding machines, the system adds all the records stored in the Z-MASTER file, as so forth. Use the following instructions:

- 1 From the DDMS Master Menu, type " (quotation marks) to access the Contact Fax & E-Mail screen.

Note: In addition to accessing the Contact Fax & E-Mail screen from the Master Menu, you can also access this screen from the (EZG) Serial Master and (EZB) Salesperson Technician Master screens when using the [C] Change and [I] Inquire action codes. To do so when changing records, at the Correct Record prompt, type " (quotation marks). When inquiring, type " (quotation marks) at the Any Key for Next Record message.

- 2 When the Contact Fax & E-Mail screen appears, type **M** to select the Mass Add action code.
- 3 At the Enter Password prompt, enter the password set in the Reindex field in the (LA) screen. If the Reindex field is blank, press Enter.
- 4 In the Area field, specify whether you are mass adding customer, machine, salesperson, or vendor contacts. Enter your response according to the following:
 - 1 Customers
 - 2 Machines
 - 3 Salesperson/Tech
 - 4 Vendor.
- 5 At the Enter Contact Type prompt, you can enter the type of contact you are adding. For example, if this contact is in the accounting department you might want to enter Acct. This box allows you to enter a small description of the contact.
- 6 At the Are You Sure prompt, type **Y**. While the contacts are mass added, the system displays the Mass Adding X-MASTER Contacts — Please Wait message. (The X is replaced by the type of category you are mass adding contacts for, Z-MASTER, C-MASTER, and so forth.)
- 7 When the process is complete, the cursor returns to the Area field so you can select another category for which to mass add contacts. When you finish, press Esc.

Setting Up Fax and E-mail Formats

Once you have your contacts set up, you can enter the default formats you want to use for faxing and e-mailing. You do this in the (L6T) Fax Parameters screen. See Figure 3.



The serialized application includes standard formats that you can use. To fax or e-mail service workorder tickets, you use the SWORKO format. To e-mail meter reading requests, you use the CEMET format, and to fax meter reading requests, you can use the CFMET. In addition, the FAXEXC format can be used to print the Fax Exception Report.

To set up formats:

- 1 Go to the (L6T) screen.
- 2 When the cursor moves to the Modem Type field, press Tab until the cursor moves to the Fax Calls field.
- 3 In the Fax Calls field, enter the name of the format you want to use to fax service calls, **SWORKO**, for example. You can also use the custom format you have specified in the (EZ1S) Serial System Parameters screen, if any.
- 4 In the Email calls field, enter the name of the format you want to use to e-mail service calls, **SWORKO**, for example. You can also use the custom format you have specified in the (EZ1S) screen, if any.
- 5 In the Fax Meters field, enter the name of the format you want to use to fax meter reading requests, **CFMET**, for example.
- 6 In the Email Meters field, enter the name of the format you want to use to e-mail meter reading requests, **CEMET**, for example.
- 7 In the Fax Renewals field, enter the name of the format you want to use to fax renewals, **SERVC2** or **MAINT**, for example.

**Figure 3:
The
(L6T) Screen**

```

11:31:57                FAX Parameters                07/22/02
=====
Modem Parameters 05/23/94                FAX Parameters
-----
Modem Type ? [1=2400E 2=NEC 3=MICROCOM]  Phone Line  #M1
Dialing Prefix :                        Baud :      Code      :
Phone Nbr #          Reliable ?         Logon Id   :
===== Modem Initialization String ===== Password   :
[                               ]          Qualifier  :
                                           Id         :
                                           Code       :
                                           Network   :
-----
Script :                                ----- Formats -----
Fax Vol:                                Statements :
                                           Invoice    :
                                           Pick-Ticket:
                                           P/O      :
                                           [ Fax ] [Email]
                                           Calls    :
                                           Meters  :
                                           Renewals :
=====
Location #
1
2
3
4
5
=====

```

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- 8 In the Email Renewals field, enter the name of the format you want to use to e-mail renewals, SERVC2 or MAINT, for example.

Note: Any contract specific formats you have set up in the (EZ4) Contract Renewal/Cancellation Parameters screen for renewals override the renewal formats you specify in these fields.

- 9 When you finish entering formats, press Enter until the cursor returns to the action code field. If you press Esc before doing so, your changes are not saved.

Faxing and E-mailing

You can easily fax and e-mail serialized information from various screens, including the (EZO), (EZP), and (EZV) screens. You can fax and e-mail multiple meter reading requests through the (EZV) screen. However, if you want to fax and e-mail individual meter reading requests, you can do so using the (EZI) screen.

Faxing and E-mailing in the (EZO) Screen

Use the following instructions:

- 1 Go to the (EZO) screen and begin logging a call in the usual manner.
- 2 At the Complete prompt, select the [F] Fax or E-mail status code.
- 3 At the Enter Fax # prompt, enter the fax or e-mail address to which the call will be sent. If you do not completely fill the field with characters, press Tab.

**Figure 4:
The
Fax or E-Mail
Prompt**

```
10:04:01 (EZO) Log In Calls 07/22/02
Ser#: 8 Sys#: 8 - Contract # Loc [ 1 ]
Text:
Item#:FT4421 Co:RIC Type desc:
Desc:21 CPM COPIER Customer :ABC COMPANY
Contact : SHAWN MEYERS Acct# 10000 Dept: Terr:
Phone : 817-123-4567 Taker : 265 Location:DALLAS TX
07/22/02 Tech:... Code:A1 Priority:1 Call# 28 Status :. Prob. Code :.
Code desc: BLURRY COPIES
Early 00:00 Late 00:00 Serv : Trans From # To # S. Code:
-----^ Invoice # --- Clicks # -----

B = Call Back Customer D = Dispatch Screen
C = Change Tech or Codes F = Fax or E-Mail
N = Not Complete I = Inquire on Dates/Times
T = Transfer Call L = Hold Call
W = Customer Will Call Back M = Call Monitor
X = Complete and Bill Workorder O = Batch Workorder
Y = Completed P = Reprint
Z = Waiting On Parts R = Redisplay Current Call
# = Enter Call Number S = Service Type Screen
J = Incomplete Job (No Parts)
Completed ?NF
Fax or E-Mail F/E ?F Format [ ]
```



- 4 At the Fax or Email prompt, shown in Figure 4, indicate whether you are faxing or e-mailing this call. Enter your response according to the following:
 - F Fax the call.
 - E E-mail the call.
- 5 In the Format field, enter the format you want to use for this call. If you do not completely fill the field, press Tab
- 6 At the Are You Sure prompt, type Y.

Faxing and E-mailing in the (EZP) Screen

Use the following instructions:

- 1 Go to the (EZP) screen.
- 2 When the (EZP) screen appears, select the [U] Utility action code.
- 3 At the C=Compress, F=Fax/E-Mail, P=Print prompt, specify whether you are faxing or e-mailing the call(s). Enter your response according to the following:
 - F Fax the call.
 - E E-mail the call.
- 4 When the cursor moves to the Problem Number field, enter the number of the call you want to fax or e-mail. See Figure 5.

Figure 5:
The
Problem
Number Prompt

```

11:48:52                               (EZP) Call Monitor                               07/22/02
===== Loc From [ ] To [ ] (Blank = All) ===== AVG. [T7:29]
Time   Prob #  CD Tech  Customer Name      First Line of Problem Text Tr Ql P
-----
----- CALLS -----
10/19      4 DC      DUNCAN'S SUPPLIES  DIRTY COPIES              B
08/21     15              ABC COMPANY        BLURRY COPIES
08/21     16 A1     ABC COMPANY        BLURRY COPIES.            1
06/05     23 A1     ABC COMPANY        DARK COPIES                1
01:47     27 A1     ABC COMPANY        BLURRY COPIES. PLEASE FIX  1

-----
C=Call, D=Disp, E=Edit, I=Inq, O=Options, R=Rspn, S=Split, T=Schedule, U=Utility
Problem Number ? [          ]      Enter Next to Fax/E-Mail-Return To Begin
    
```

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- 5 The cursor returns to the Problem Number field. Enter the next number of the call you want to fax or e-mail.
- 6 When you finish entering problem numbers, press Enter.
- 7 The cursor moves to the Subject for E-Mail field. Press Enter to accept the default text, Service Workorder, or enter the text you want to appear on the subject line of the e-mail or fax you are sending. If you do not completely fill the field with characters, press Enter.
- 8 At the Are You Sure prompt, type **Y**.

Faxing and E-mailing Meter Requests in the (EZV) Screen

Use the following instructions:

- 1 Go to the (EZV) screen, and select the [M] Meter action code.
- 2 When the cursor moves to the Date field, press Enter to accept the system date or enter a different date.
- 3 At the Enter R=Read Meters, U=Unread Meters, B=Both prompt, you can limit the meters that will be included. Enter your response according to the following:
 - R** Includes only meters that have readings entered.
 - U** Includes only new meters that have readings entered.
 - B (default)** Includes both types of meters.
- 4 In the Sort field, you enter the first sort for the meter billing. The sort you enter determines how the information will print. (The available sorts are listed to the right of the Sort field.)
 - If you do not want to enter sorts, press Enter. Go to **Step 6**.
 - To enter the first sort, enter the letter corresponding to the sort you want to use. For example, to sort the meter billing by contract date, enter **D**.
- 5 When the cursor moves to the second Sort field, you can enter the second sort for this billing. If you do not want to enter a second sort, press Enter.
- 6 The cursor moves to the System # or Serial # field, depending on the setting in the Display Type field in the (EZ1L) Serial Log In Parameters screen. At this point, you can use the System # through Billing Freq fields to set limits for the meters you want to bill.
 - If you do not want to set limits, press Enter. Go to **Step 7**.

- To set limits, enter the beginning of the range in the first field and the end of the range in the corresponding To field. To limit to a single value, enter the beginning limit in the first field and leave the corresponding To field blank. Only records with the value you specify are included.
- 7 After you set limits or press Enter, the Fax/E-Mail Meter Reading Requests prompt appears, as shown in Figure 6. Type **Y** to fax or e-mail the meter reading requests.
 - 8 At the Are You Sure prompt, type **Y**.

You can also fax or e-mail requests using the new [F] Fax/E-Mail action code in the (EZV) screen. Use the following instructions.

- 1 Go to the (EZV) screen, and select the [F] Fax/E-Mail action code.
- 2 When the cursor moves to the Date field, press Enter to accept the system date or enter a different date.
- 3 In the A=All Un-Read, O=Only Un-Faxed/E-Mailed field, you can specify which meters you want to include. See Figure 7. Enter your response according to the following:
 - A** Include meters that do not have meter readings entered.
 - O** Include only meters that do not have meter readings entered.

Figure 6:
The
Fax/E-Mail
Meter Reading
Requests
Prompt

```

13:16:58                (EZV) Serial Meter Maintenance                07/22/02
Ser#:..... Sys#:..... - .... Contract #.... Loc [...]
Text:..... Type desc:.....
Item#:..... Co:..... Location:.....
Desc:.....
Customer #..... Dept :.... Customer:.....

Date 07/22/02    R=Read Meters, U=Unread Meters, B=Both ?B
Sort ? ? C=Customer Name, N=Account Number, D=Contract Dates, T=Contract Type
          S=System/Sub, I=Item Number, F=Billing Frequency, R=Territory, Y=City

System #          Sub :          To #          Sub :
Serial #          To #
Loc :             To :
Item #           Co:           To #           Co:
Customer Acct #   Dept :          To #           Dept :
City :            To :
Territory :       To :
Equipment Type : To :
Contract :        To :
Contract Date From / / To : / /
Contract Date To / / To : / /
Billing Freq :    To :
=====
Fax/E-Mail Meter Reading Requests Y/N ?
    
```

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- 4 In the By System field, you can specify that the system individually fax or e-mail a meter reading request to a specific system. Enter your response according to the following:
 - Y Limit the meter reading request to a specific system.
 - N Do not limit the meter reading request to a specific system.
- 5 When the cursor moves to the Sort field, specify sorts and limits in the usual manner.
- 6 At the Are You Sure prompt, type Y.

Faxing and E-mailing Renewals in the (EZI) Screen

You can use this method to fax or e-mail a single renewal request. Use the following instructions:

- 1 Go to the (EZI) screen, and select the [I] Inquire action code.
- 2 When the cursor moves to the Ser # field, retrieve the record of the machine for which you want to send the contract renewal.
- 3 The system displays the record that most closely matches the one you specified, along with the F=Fax/E-Mail prompt, as shown in Figure 8. Type F.

Figure 7:
The
A=All Un-Read,
O=Only Un-
Faxed/E-Mailed
Field

```
13:36:02                (EZV) Serial Meter Maintenance                07/22/02
Ser#:..... Sys#:..... - .... Contract #.... Loc [...]
Text:..... Type desc:.....
Item#:..... Co:..... Location:.....
Desc:.....
Customer #..... Dept :.... Customer:.....

Date 07/22/02  A=All Un-Read, O=Only Un-Faxed/E-Mailed ?O By System Y/N ?Y
Sort ? . ? . C=Customer Name, N=Account Number, D=Contract Dates, T=Contract Type
           S=System/Sub, I=Item Number, F=Billing Frequency, R=Territory, Y=City
System #..... Sub :.... To #..... Sub :....
Serial #..... To #.....
Loc :.. To :..
Item #..... Co:..... To #..... Co:.....
Customer Acct #..... Dept :.... To #..... Dept :....
City :..... To :.....
Territory :.. To :..
Equipment Type :..... To :.....
Contract :.... To :....
Contract Date From ..../.. To :../..
Contract Date To ..../.. To :../..
Billing Freq :. To :.
```

- 4 The system displays the type and contact name associated with this machine, along with the Correct prompt. This information comes from the text-based Contact Fax & E-Mail screen or the Contact window. Enter your response according to the following:
 - Y The information is correct.
 - C The information is not correct. The cursor moves to the Contact field so you can change the name of the contact to whom this e-mail or fax will be sent.
 - N The information is not correct. The system automatically displays the next contact name in the database.
- 5 At the Enter Fax # prompt, enter the fax or e-mail address to which this renewal will be sent. If you do not completely fill the field with characters, press Tab.
- 6 At the Fax or Email prompt, shown in Figure 8, indicate whether you are faxing or e-mailing this renewal. Enter your response according to the following:
 - F Fax the call.
 - E E-mail the call.
- 7 In the Format field, enter the format you want to use. If you do not completely fill the field, press Tab
- 8 At the Are You Sure prompt, type Y.

Figure 8:
The
F=Fax/E-Mail
Prompt

```

13:57:54                (EZI) Serial Contracts Master * INQUIRE * 07/22/02
Ser#:                   321 Sys#:                   321 - Contract #FSMA Equip Type:
Text:                   Type desc:FULL SERVICE MAINT AGREEMENT
Item#:COPIER            Co:                         Ext. desc:10 K ALLOWED OVERAGE MONTHLY
Desc:                   Location:
-----
Name :DUNCAN'S SUPPLIES Customer # 10003 Dept :
Original Contract Date / / Mfg Wty / / to / / (P/L/B) :
Contract From / / to / / Dlr Wty / / to / / (P/L/B) :
Contract Length: Period : Warranty Only :
Time : Used : Left : Service Freq : at $ .00(P/L/B) :
Supplies Included Class Range :
Bill Freq :M at $ 100.00 Bill Code : From : To : + [ , , , ] PM Code :
Bill Cost $ Dept : Slsm # Depts Service : Labor : Travel :
Up Renewal Billing Amount %
Auto-Renew : Up Cost %
P/O # Defer Income : [ Serial Data ]
[ Customer Remarks ] Umbrella System #
Tech Qlf : Slsm : 999 Application :
Customer Ext P.O. :
Contact : Loc [ 1 ]
=====
F=Fax/E-Mail, L=Lease, U=Umbr., <RET>=Next Record Any Key But ESC For Depts

```

Faxing and E-mailing Renewals in the (EZU) Screen

Several changes have been made in the (EZU) screen. The F=Contract Forms action code has now been changed to the C=Contract Forms action code. The C=Cancellation Forms action code has been changed to the X=Cancellation Forms action code, and the new F=Fax/E-Mail Renewals action code has been added to the list of available action codes. See Figure 9. Use the following instructions to fax or e-mail renewals:

- 1 Go to the (EZU) screen, and select the [I] Invoice Renewals action code.
- 2 When the cursor moves to the (A)ll, (N)ew, (P)ast field, indicate which contracts you want to include in this renewal. Enter your response according to the following:
 - A Includes all contracts that need renewal, including those that were previously invoiced and are waiting to be updated.
 - N Includes only new contracts.
 - P Includes those contracts that were previously invoiced and are waiting to be updated.
- 3 In the Consolidate Billings field, indicate if you want to consolidate the renewals. Enter your response according to the following:
 - Y Consolidate the billing.
 - P Do not consolidate the billing.

Figure 9:
The
Changed Action
Codes in the
(EZU) Screen

```

14:31:01                (EZU) Serial Contract Maintenance                07/22/02
Ser#:..... Sys#:..... - .... Contract #....
Text:..... Type desc:.....
Item#:..... Co:..... Customer:.....
Desc:..... Location:.....
-----
Action [R]                Last Update
R = Renewals Report/Form  Auto-Renew Y/N/X/Blank=All ?.  MM/DD/YY
I = Invoice Renewals      (A)ll, (N)ew, (P)ast        ?.  MM/DD/YY
U = Update Renewals      Consolidate Billings Y/N ?.
C = Contract Forms       Fax/E-Mail Renewals Y/N ?N
X = Cancellation Forms
F = Fax/E-Mail Renewals
Sort Order ?. (#=Acct. Nbr, N=Customer Name, Z=Zip, S=System#, C=Contract Type)
Location      :.. To :.. (Blank=All) Exclude Y/N ?.
Contract Type :.... To :.... Exclude Y/N ?.
Renewal Form  :..... To :..... Exclude Y/N ?.
System       :..... Sub :.... To :..... Sub :.... Exclude Y/N ?.
Item         :..... To :..... Exclude Y/N ?.
Customer     :..... Dept:.... To :..... Dept:.... Exclude Y/N ?.
Renewal Date :../../.. To :../../.. Exclude Y/N ?.
Form Printer [B:] Copies [ 1] Print Report Y/N [Y] Report Printer [Pl]
=====
    
```

- 4 The cursor moves to the Fax/E-Mail Renewals field. To fax or e-mail the renewals to the customer, type **Y**.
- 5 When the cursor moves to the Ser# field, you can include all the contracts that fall within the limits you set, or include a particular contract. Enter the contract that you want to limit to or press Enter to include all the contracts.
- 6 In the Sort Order field, you enter one sort for the Renewals Report. The sort you enter determines how the information will print on the report. The system defaults to sort the report by system number.
- 7 When the cursor moves to the Location field, you can use the Location through Renewal Date fields to set limits for the contracts you want to include.
 - If you do not want to set limits, press Enter. Go to **Step 8**.
 - To set limits, enter the beginning of the range in the first field and the end of the range in the corresponding To field. To limit to a single value, enter the beginning limit in the first field and leave the corresponding To field blank. Only records with the value you specify are included..
- 8 In the Form Printer field, specify the printer where you want the contract forms to print. (This is the form you will send the customer. It lists the agreed upon rates and terms for the contract.)
- 9 In the Copies field, press Tab to accept the default of one copy, or enter the number of copies that you want to print.
- 10 In the Print Report field, press Tab or type **Y**.
- 11 In the Report Printer field, press Tab to accept the default printer, or enter the logical number of the printer where you want the report to print.
- 12 The cursor moves to the date field in the upper right hand corner of the screen. The date you specify will be used together with the number of days before the contract expires (set in the #__Days field in the (EZ4) screen) to determine which contracts are due for renewal. Press Tab to accept the default date, or enter the date that you want to use to generate the renewals.
- 13 At the Print Contract Analysis prompt, specify whether you want to print the contract analysis for each contract.
- 14 The system displays the Enter Contact Type to Use for Fax/E-Mail prompt, as shown in Figure 10. At this prompt, enter the contact type for the contracts you are sending renewals for.
- 15 At the Are You Sure prompt, type **Y**.

Serialized Faxing and E-mailing

You can also fax or e-mail requests using the new [F] Fax/E-Mail Renewals action code in the (EZU) screen. When you do, the system uses the records already in the Z-RENEWALS file to know what to fax or e-mail. You can also set limits for the records you want to include. Use the following instructions:

- 1 Go to the (EZU) screen, and select the [F] Fax/E-Mail Renewals action code.
- 2 When the cursor moves to the Location field, you can use the Location through Renewal Date fields to set limits for the contracts you want to include.
 - If you do not want to set limits, press Enter. Go to **Step 3**.
 - To set limits, enter the beginning of the range in the first field and the end of the range in the corresponding To field. To limit to a single value, enter the beginning limit in the first field and leave the corresponding To field blank. Only records with the value you specify are included.
- 3 The cursor moves to the Date field in the upper right hand corner of the screen. The date you specify will be used together with the number of days before the contract expires (set in the #__Days field in the (EZ4) screen) to determine which contracts are due for renewal. Press Tab to accept the default date, or enter the date that you want to use to generate the renewals.
- 4 At the Are You Sure prompt, type Y.

Figure 10:
The
Enter Contract
Type Prompt

```

14:47:40                (EZU) Serial Contract Maintenance                07/22/02
Ser#:                   Sys#:..... - .... Contract #....
Text:.....              Type desc:.....
Item#:.....             Co:.....             Customer:.....
Desc:.....              Location:.....
-----
Action [I]
R = Renewals Report/Form   Auto-Renew Y/N/X/Blank=All ?   MM/DD/YY
I = Invoice Renewals       (A)ll, (N)ew, (P)ast          ?N   MM/DD/YY
U = Update Renewals       Consolidate Billings          Y/N ?Y
C = Contract Forms        Fax/E-Mail Renewals           Y/N ?Y
X = Cancellation Forms
F = Fax/E-Mail Renewals

Sort Order ? (#=Acct. Nbr, N=Customer Name, Z=Zip, S=System#, C=Contract Type)
Location      :                               To : (Blank=All)           Exclude Y/N ?
Contract Type :                               To :                       Exclude Y/N ?
Renewal Form  :                               To :                       Exclude Y/N ?
System        :           Sub :                To :           Sub :     Exclude Y/N ?
Item          :                               To :                       Exclude Y/N ?
Customer      :           Dept:                To :           Dept:     Exclude Y/N ?
Renewal Date  : / /                          To : / /                  Exclude Y/N ?
Form Printer [B:]  Copies [ 1]  Print Report Y/N [Y]  Report Printer [Pl]
=====
Enter Contact Type to Use for Fax/E-Mail [.....]
  
```

Note: You can check the progress and status of an e-mail or fax using the Monitor screen in the (&) DDMS Faxing screen. To do so, go to the (&) screen and select the [7] Monitor action code. For more information, see the *AutoComm* handout which is available via the Internet at www.ddms.com/support/doc/miscdoc.htm.
