



Process Documentation

Department:

Customer Support

Last Updated:

11/21/2024 8:35 AM

NAME OF PROCESS

Document Delivery Overview

Use Case / Objectives

The purpose of this document is to walk you through the differences between the two types of document delivery within RentalMan, Auto-Fax/Email and Document Distribution.

NOTE: For steps on how to set up the different types of Document Distribution, refer to the *Document Distribution Workflow* document.

Configuration, Training, and Reporting

Menu options to access:

Main Operations => Rental File: Customer Master File Maintenance

Document Delivery Overview

There are two different methods for document delivery within the context of RentalMan: Auto-Fax/Email and Document Distribution. Let's break down the key points for each method:

1. Auto-Fax/Email:

- **Functionality:** Automatically faxes or emails a document to the fax number or email address specified in the **Customer Master File - Document Distribution Entry** form.

Document Distribution Entry

Cust #: 1123 CUSTOMER - PARTS
 Job #:

First Name:
 Last Name:

Email:

--OR--
 Fax: Country code:

Document:

Press Enter when done or F12 to cancel

- **Suitability:** Best suited for customers or processes that only require documents to be sent to a single contact.
- **Advantages:** Simple and straightforward for scenarios where a single contact is sufficient for document delivery.

2. Document Distribution:

- **Functionality:** Utilizes a distribution list set up by customer and document type, allowing multiple contacts to be assigned to a customer/document type combination.

10/07/24 11:45:45 Document Distribution Assignment Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO

Customer #: 1123 CUSTOMER - PARTS

Type option, press Enter.
 2=Change 4=Delete

Op	Contact Name	Customer Name	Job Name	Doc Type
<input type="checkbox"/>	DELANEYA CLARK	CUSTOMER - PARTS	A.E HOMES	CYCLE BILL
<input type="checkbox"/>	SCOTT DETWILER	CUSTOMER - PARTS		CYCLE BILL
<input type="checkbox"/>	SCOTT DETWILER	CUSTOMER - PARTS		FULL RETURN
<input type="checkbox"/>	SCOTT DETWILER	CUSTOMER - PARTS		PARTIAL RETURN

- **Suitability:** Ideal for scenarios where documents need to be sent to multiple contacts, or for business processes where documents are processed and/or stored centrally.
- **Advantages:** Provides flexibility by allowing you to manage which contacts will receive the document just prior to delivery. Well-suited for situations requiring distribution to various individuals or departments.

Considerations for Choosing Between the Two:

- **Single vs. Multiple Contacts:** If your document delivery primarily involves a single contact, Auto-Fax/Email might be more straightforward. If multiple contacts are involved, Document Distribution offers greater flexibility.
- **Document Type and Customer Specifics:** Consider the variability in document types and customer requirements. If there's a need for customized distribution lists based on document type and customer, Document Distribution becomes valuable.
- **Ease of Management:** Auto-Fax/Email is automatic and may be simpler to manage for straightforward cases. Document Distribution provides more control but may require additional configuration.
- **Centralized Processing:** If documents are processed or stored centrally, Document Distribution aligns well with such scenarios.

Ultimately, the choice between Auto-Fax/Email and Document Distribution depends on the specific requirements of your document delivery processes and the preferences of your users. It might also be beneficial to gather feedback from users who handle document delivery to understand their needs and preferences.