



Process Documentation

Department:

Customer Support

Last Updated:

8/11/2025 12:14 PM

NAME OF PROCESS

Setup Auto-Emailing in a Customer Account [GreenScreen]

Use Case / Objectives

The process of setting up auto-emailing ensures that customers are receiving their monthly invoices by email without having to go into the system and sending them manually.

Menu options to access:

3: Accounts Receivable Menu => 1: Charge Customers

Setup Auto-Emailing in a Customer Account [GreenScreen]

NOTE: When navigating through **RentalMan GreenScreen**, use the Tab key to move through fields when in a selected menu or screen. If you need to move back to a field, use the combination of Shift+Tab.

1. Log into the **RentalMan GreenScreen** environment using your credentials.
2. In the *Option or command* field, type 3 for the **Accounts Receivable Menu**.

```
WSMAIN                               RentalMan®                               Sys
10/04/24                               Cmp

1. Operations Menu
2. Purchasing Menu
3. Accounts Receivable Menu
4. Accounts Payable Menu
5. General Ledger Menu
6. Sales Analysis Menu
7. Equipment Maintenance Menu
8. System File Maintenance Menu
9. Cross Application Maintenance Menu
10. Data File Purge Options
11. Conversion Menu

80. What's New
88. Enhanced User Maintenance
90. Signoff           99. Printers

Option or command
==> 3
```

3. Press Enter.
 - a. The 1 screen opens.

```
ARMNUO                      Accounts Receivable Options          Sys: DEMO V12
10/04/24                      Cmp: RM Loc: DMO

Master File Maintenance      File Inquiry
-----
1. Charge Customers          71. Customer Invoice Inquiry
2. A/R Adjustment Codes     72. Charge Customer Transactions
3. A/R Credit Codes         73. Customer Collection Comments
4. Customer Authorized Users 74. Credit Collection Call List
5. A/R User Authority       75. A/R Summary Aging Display
6. Quick Pay Discount Codes  76. Customer Register in Dt Range

Transaction Processing
-----
11. Cash Receipts
12. A/R Batch Inquiry
13. Post Customer Payments
14. Post Credit Card Payments
21. Account to Account Transfer
22. A/R Adjustments
Option or command
===> _____
```

4. In the *Option or command* field, type 1 for Charge Customers.

```
Master File Maintenance
-----
1. Charge Customers
2. A/R Adjustment Codes
3. A/R Credit Codes
4. Customer Authorized Users
5. A/R User Authority
6. Quick Pay Discount Codes

Transaction Processing
-----
11. Cash Receipts
12. A/R Batch Inquiry
13. Post Customer Payments
14. Post Credit Card Payments
21. Account to Account Transfer
22. A/R Adjustments
Option or command
===> 1 _____
```

5. Press Enter.
 - a. The Customer Master Maintenance screen opens, displaying a table of customers in the system.

```

10/04/24 10:14:36                               Customer Master Maintenance
Type option, press Enter to continue:
2=Edit  9=Insurance  19=Document Distribution  22=Tax Inquiry  25=Withdrawal Tax  26=Style Sheets  More...

Op  Customer  Status  Name
-----
 508  I          MIKE
 656  I          ALEX
 782  A          A RENT-ALL SHOP, INC
 783  A          A TEAM CONSTRUCTION
1123  A          CUSTOMER - PARTS
 781  A          A&A SALES
 784  A          A&A TOOL RENTAL & SALES, INC
 785  A          A&W CONTRACTORS, INC
 786  A          A-1 COAST RENTALS
 787  A          A-1 MACHINERY
 676  A          Aaaa
   6  C          ABC COMPANY
 534  B          ABC RENTALS
 888  A          ABLE EQUIPMENT TEST
5555  A          Ace Construction
    
```

6. Either scroll through the list of customers or use the *Customer (number)* column or the *Name* column to search for the desired Customer.

```

10/04/24 10:18:32                               Customer Master Maintenance
Type option, press Enter to continue:
2=Edit  9=Insurance  19=Document Distribution  22=Tax Inquiry  25=Withdrawal Tax  26=Style Sheets  More...

Op  Customer  Status  Name
-----
 794  A          DANA
                   DANAS CUSTOMER
    
```

7. Type 2 in the *Op* column next to the desired customer's information.

```

10/04/24 10:18:32                               Customer Ma
Type option, press Enter to continue:
2=Edit  9=Insurance  19=Document Distribution  22=Tax Inqu

Op  Customer  Status  Name
-----
 2  794  A          DANA
                   DANAS CUSTOMER
    
```


10. Type the Customer's email address into the *Email* field.

```

Additional Customer Information
Press Enter when done or F12 to disregard
Rate number: _____ Rate
LOYALPLUS _____ Member
A/R G/L Account: _____ Allow
                                     ASTERION Detail
Inspection Due Term: _____
Email: dana.alexander@intemposoftware.com
Auto Fax or Email: _ (F/E/A/B/C/N/Q - see
Inc Comm Rpt (Y/N): _____ Alt cus
    
```

11. Click on the *Auto Fax* or *Email* field.

```

Additional Customer Information
Press Enter when done or F12 to disregard
Rate number: _____ Rate
LOYALPLUS _____ Member
A/R G/L Account: _____ Allow
                                     ASTERION Detail
Inspection Due Term: _____
Email: dana.alexander@intemposoftware.com
Auto Fax or Email: _ (F/E/A/B/C/N/Q - see
Inc Comm Rpt (Y/N): _____ Alt cus
    
```

12. Press F1.

- a. The *RentalMan Help* window opens, listing the valid options for the *Auto Fax* or *Email* field.

```

RentalMan® Help
- This field is the customer auto fax/email invoice flag. (CMAFOE)
  F2=Extended help  F3/F12=Exit  F14=Print help

Valid fields are:  F = Fax      to 1
                  E = Email   to 1
                  A = Fax     to 1 and 2
                  B = Email   to 1 and 2
                  C = Fax/Email to 2
                  N = don't fax or email
                  Q = Print and Email 2

Code 1 & 2 descriptions
1=(Rental return, Equipment Sales, P/M sales, Work Order, Manual Invoice)
2=(Cycle Billing Email or Fax) *see note below

More...
    
```

13. Once you have determined which option to use, press F3 to exit the screen.
 - a. The *RentalMan Help* window closes and the **Additional Customer Information** screen displays.
14. Type the desired option in the *Auto Fax or Email* field.
 - a. The entered option displays in the field.

```
Additional Customer Information
Press Enter when done or F12 to disregard changes.
Rate number: _____ Rate code: _____
LOYALPLUS _____ Member Since: _____
A/R G/L Account: _____ Allow job site trf: _ (Y/N)
ASTERION Detail File: _ (Y/N/ )
Inspection Due Term: _____
Email: dana.alexander@intemposoftware.com
Auto Fax or Email: E (F/E/A/B/C/N/Q - see help desc.)
Inc Comm Rpt (Y/N): _ Alt cus#: _____
Rep % of comm: _____ Contract type: _
Risk: _ Risk Date _____
Registrar#: _____ Siret#: _____ Group: _____
Customer release number _____
Job release number _____
Extension date _____
Work order number _____
Work order release _____
F9=Insurance Info F10=Credit Insurance
Enter additional customer information.
```

15. Press Enter.
 - a. The **Additional Customer Information** screen closes and the **Customer Master Maintenance** screen displays.
16. Press Enter.
 - a. The **Customer Master Maintenance** screen displays.
17. If you would like to verify your email options saved for your customer, follow steps 8-10 to confirm the *Email* and the *Auto Fax or Email* fields contain the information entered.