Process Documentation

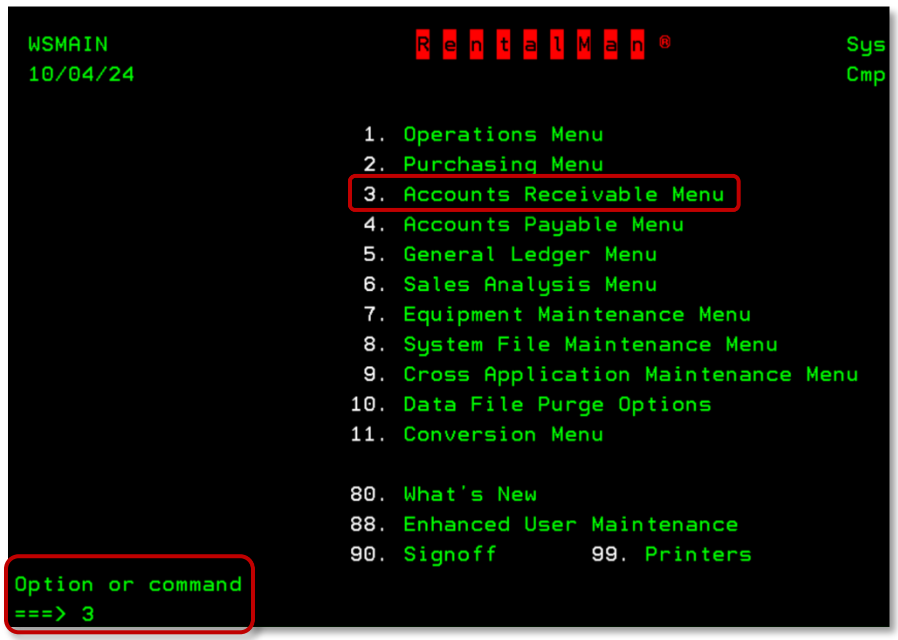
Department:
Customer Support
Last Updated:
8/11/2025 12:14 PM

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

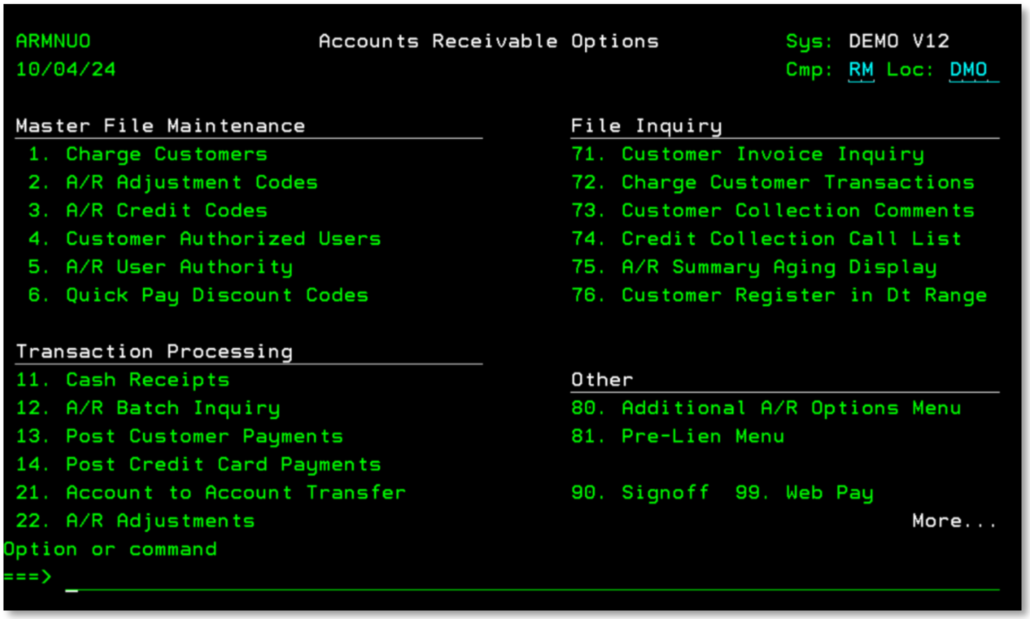
Setup Auto-Emailing in a Customer Account [GreenScreen]

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.

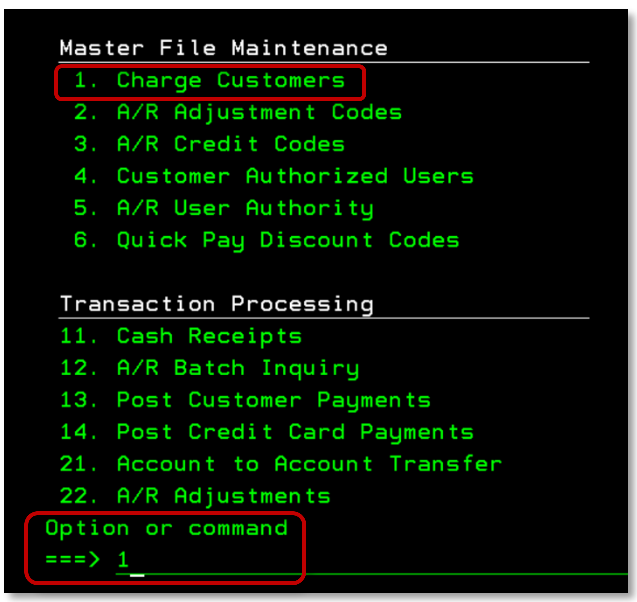
1. Log into the **RentalMan GreenScreen** environment using your credentials.
2. In the *Option or command* field, type *3* for the **Accounts Receivable Menu**.



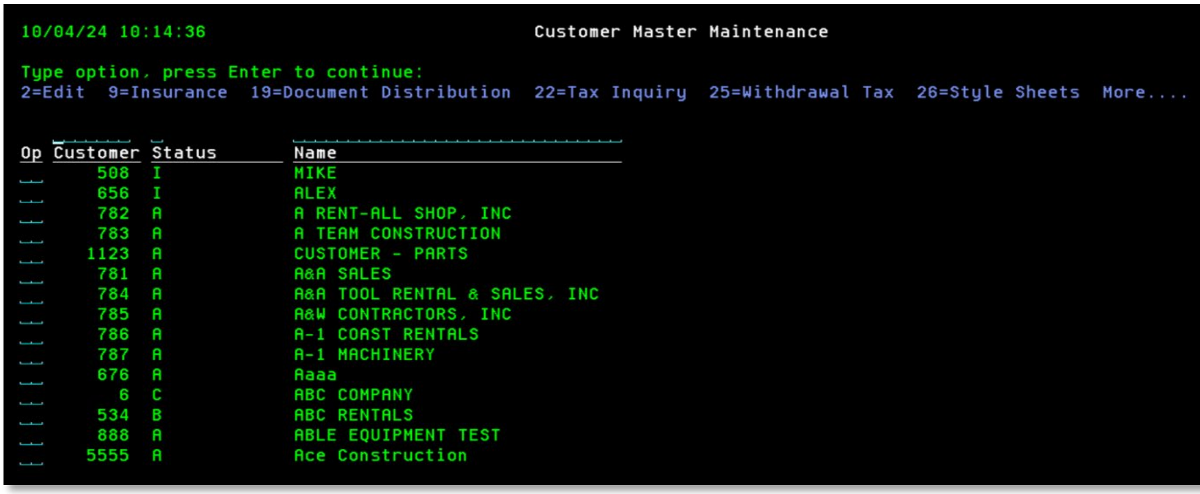
3. Press Enter.
    a. The **1** screen opens.



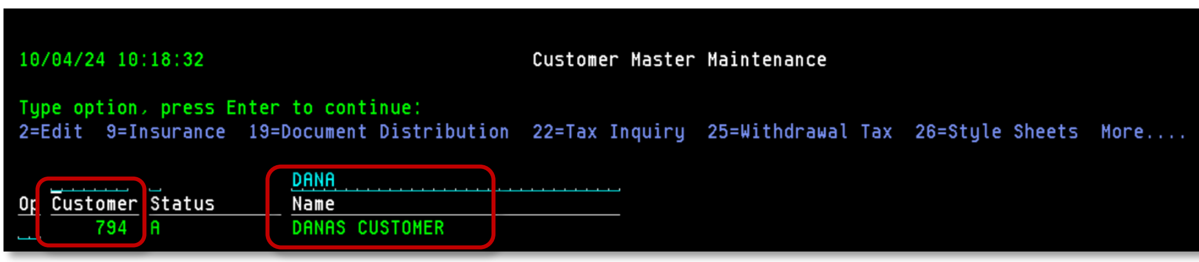
4. In the *Option or command* field, type *1* for **Charge Customers**.



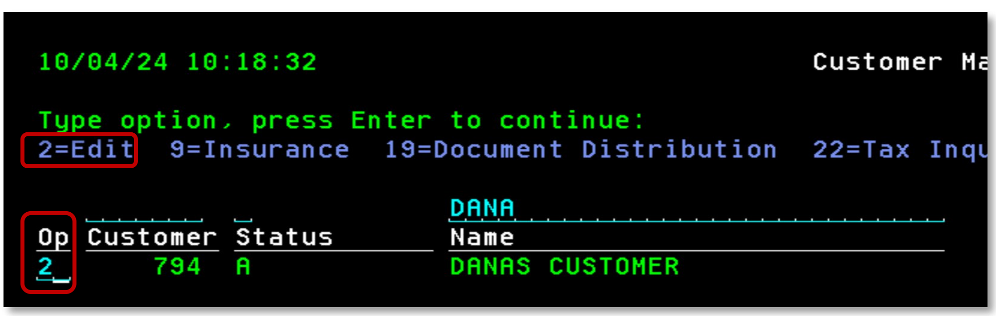
5. Press Enter.
    a. The **Customer Master Maintenance** screen opens, displaying a table of customers in the system.



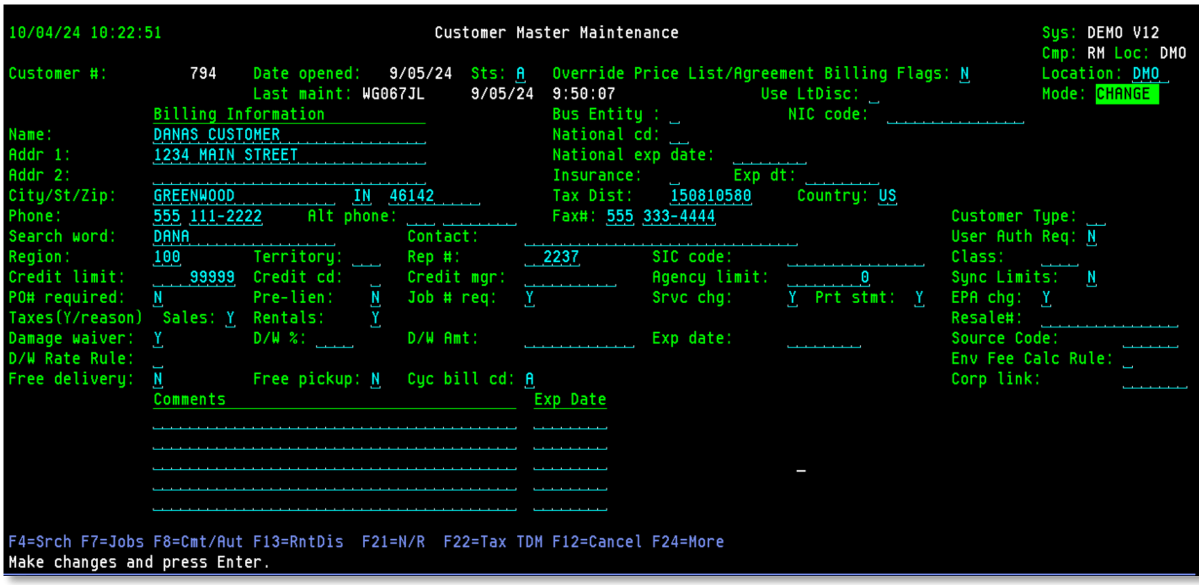
6. Either scroll through the list of customers or use the *Customer (number)* column or the *Name* column to search for the desired Customer.



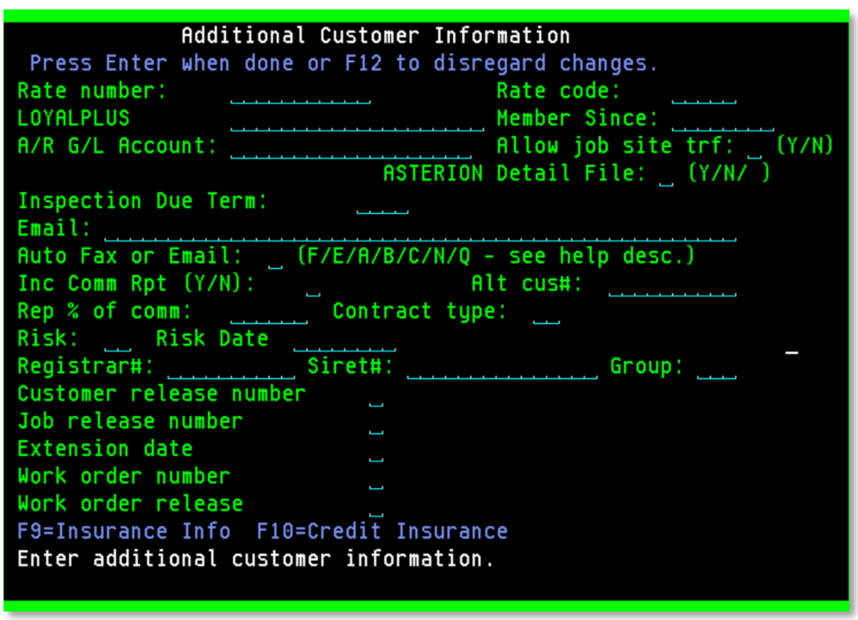
7. Type *2* in the *Op* column next to the desired customer's information.



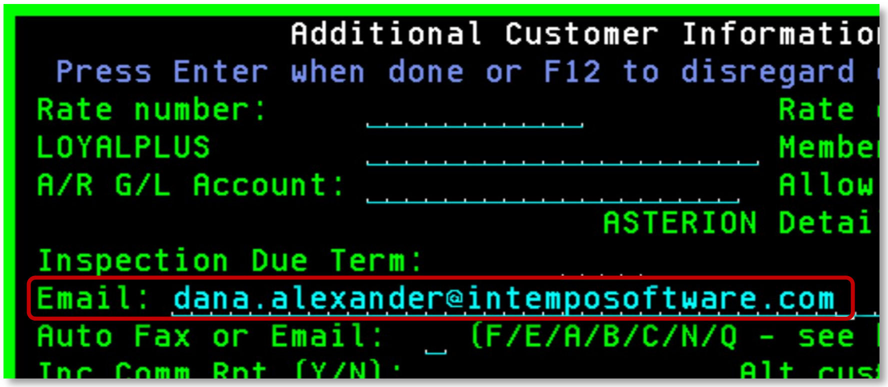
8. Press Enter.
    a. The **Customer Master Maintenance** screen opens, displaying details in the system for the selected customer.



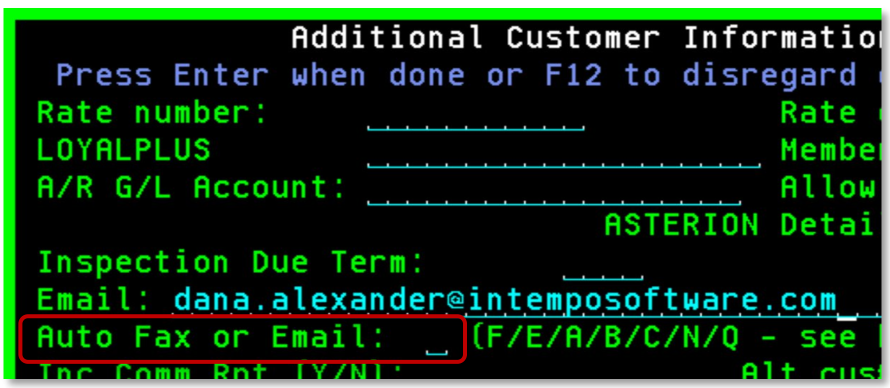
9. To bring up additional customer information, including their email, press F17 (shift+F5).
    a. The **Additional Customer Information** screen opens.



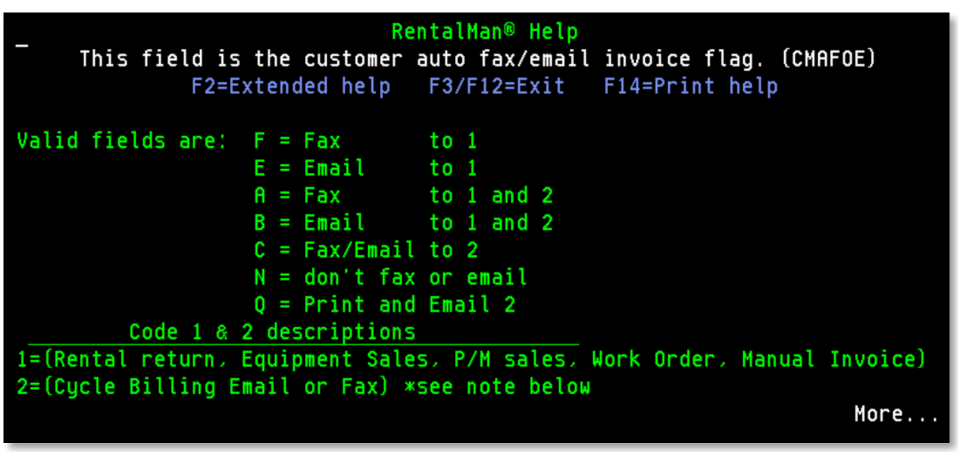
10. Type the Customer's email address into the *Email* field.



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

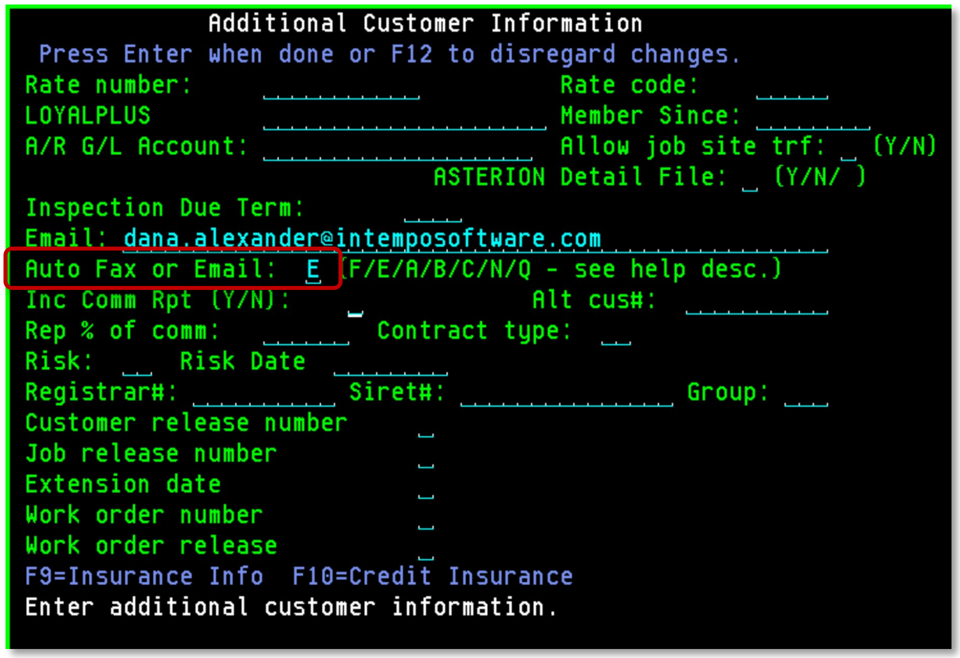


12. Press F1.
    a. The *RentalMan Help* window opens, listing the valid options for the *Auto Fax or Email* field.



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.



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 Emai* fields contain the information entered.