InTempo

Process Documentation

Department:

Customer Support

Last Updated:

12/10/2025 8:54 AM

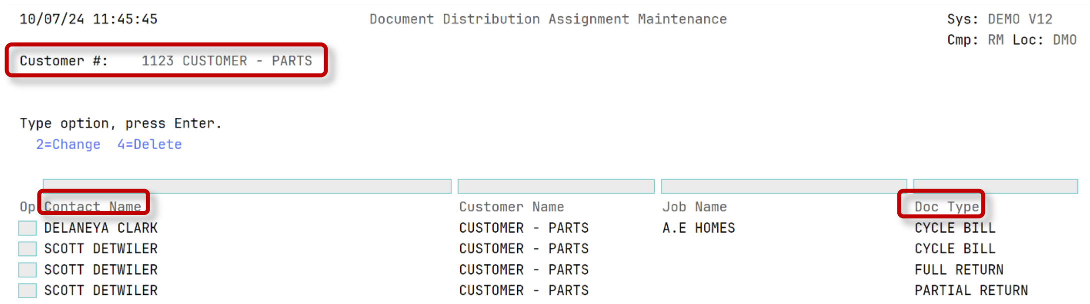
NAME OF PROCESS Maintaining Document Delivery and Distribution
Use Case / Objectives
The purpose of this document is to walk you through the differences between the two types of document delivery within RentalMan; Document Distribution and Auto-Fax/Email and the process of setting up document distribution for each type.
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: Document Distribution and Auto-Fax/Email. Let's break down the key points for each method:

1. **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

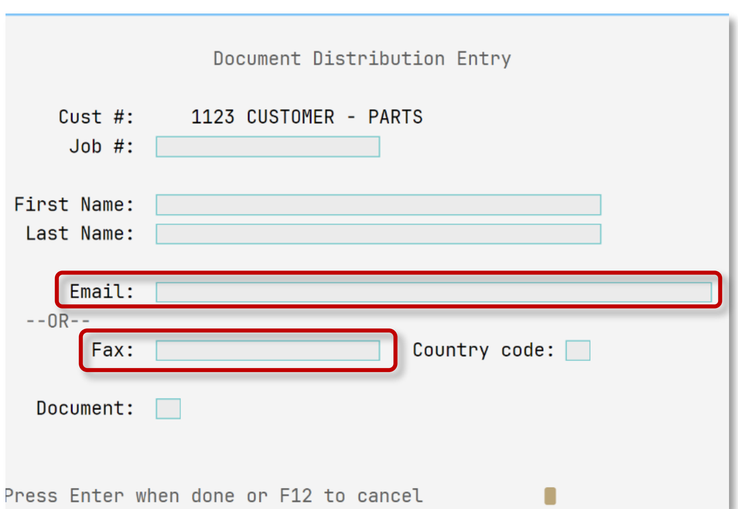
Op	Contact Name	Customer Name	Job Name	Doc Type
	DELANEYA CLARK	CUSTOMER - PARTS	A.E HOMES	CYCLE BILL
	SCOTT DETWILER	CUSTOMER - PARTS		CYCLE BILL
	SCOTT DETWILER	CUSTOMER - PARTS		FULL RETURN
	SCOTT DETWILER	CUSTOMER - PARTS		PARTIAL RETURN

    - **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.

2. **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.

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 is 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 Document Distribution and Auto-Fax/Email 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.

Document Distribution

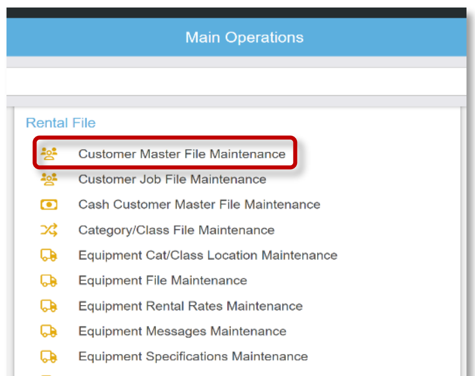
The Document Distribution feature uses a distribution list set up by the customer to determine when and to whom to deliver documents. This section explains how to create a distribution list and how to use the new fax and email window for effective and manageable document delivery.

Add a Distribution

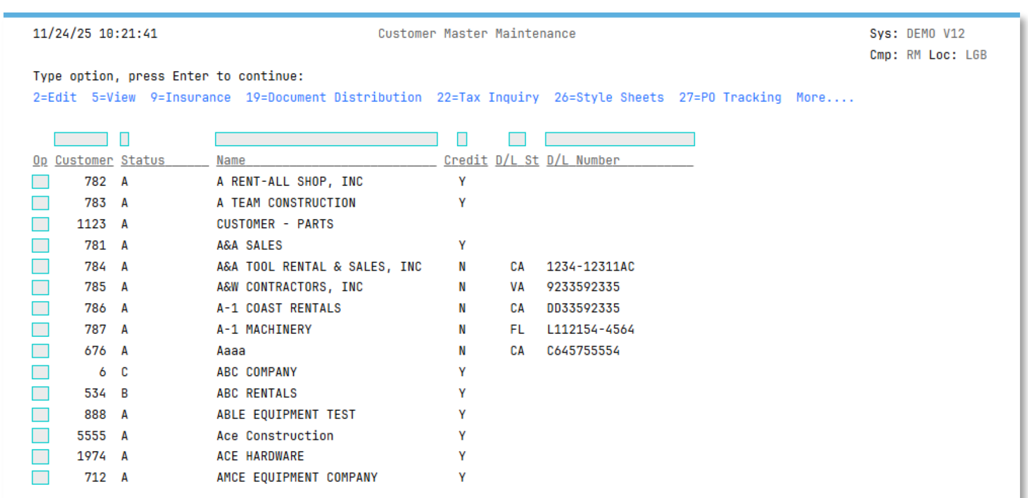
Distribution lists are set up by the customer and consist of any number of distributions. Each distribution specifies a contact, a method of contact (fax or email) and a document type.

Process Steps

1. Log into the [Roleplay environment] using your credentials.
2. On the **Main Operations** screen, In the **Rental File** section, click on **Customer Master File Maintenance**.



   a. The **Customer Master Maintenance** screen opens displaying customers in the system.

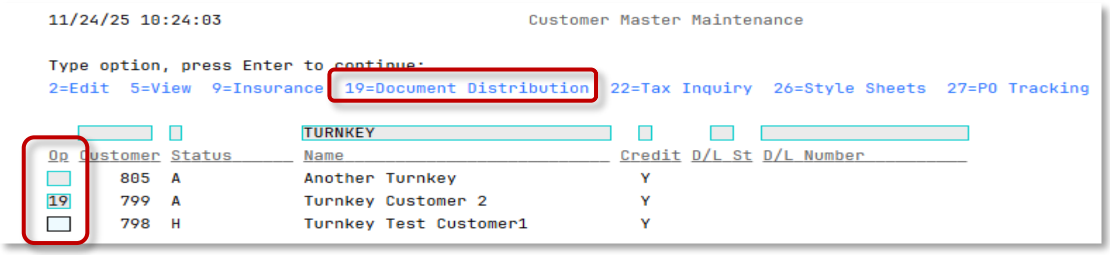


11/24/25 10:21:41 Customer Master Maintenance Sys: DEMO V12
Cmp: RM Loc: LGB

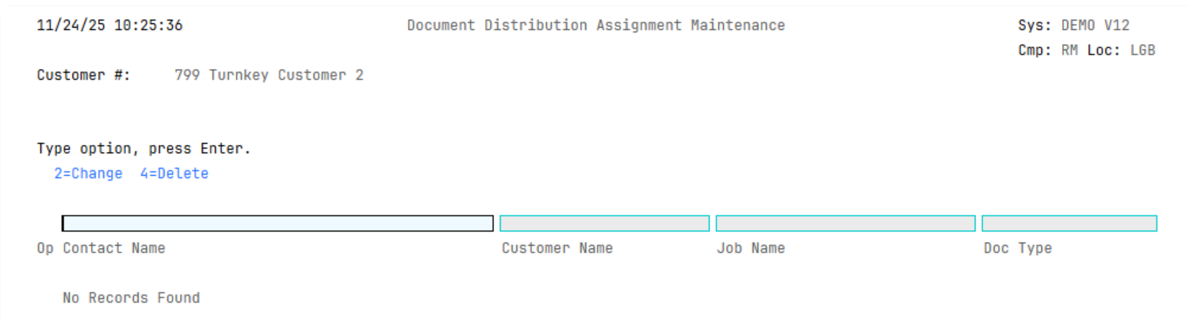
Type option, press Enter to continue:
2=Edit 5=View 9=Insurance 19=Document Distribution 22=Tax Inquiry 26=Style Sheets 27=PO Tracking More....

Op	Customer	Status	Name	Credit	D/L St	D/L Number
	782	A	A RENT-ALL SHOP, INC	Y		
	783	A	A TEAM CONSTRUCTION	Y		
	1123	A	CUSTOMER - PARTS			
	781	A	A&A SALES	Y		
	784	A	A&A TOOL RENTAL & SALES, INC	N	CA	1234-12311AC
	785	A	A&W CONTRACTORS, INC	N	VA	9233592335
	786	A	A-1 COAST RENTALS	N	CA	DD33592335
	787	A	A-1 MACHINERY	N	FL	L112154-4564
	676	A	Aaaa	N	CA	C645755554
	6	C	ABC COMPANY	Y		
	534	B	ABC RENTALS	Y		
	888	A	ABLE EQUIPMENT TEST	Y		
	5555	A	Ace Construction	Y		
	1974	A	ACE HARDWARE	Y		
	712	A	AMCE EQUIPMENT COMPANY	Y		

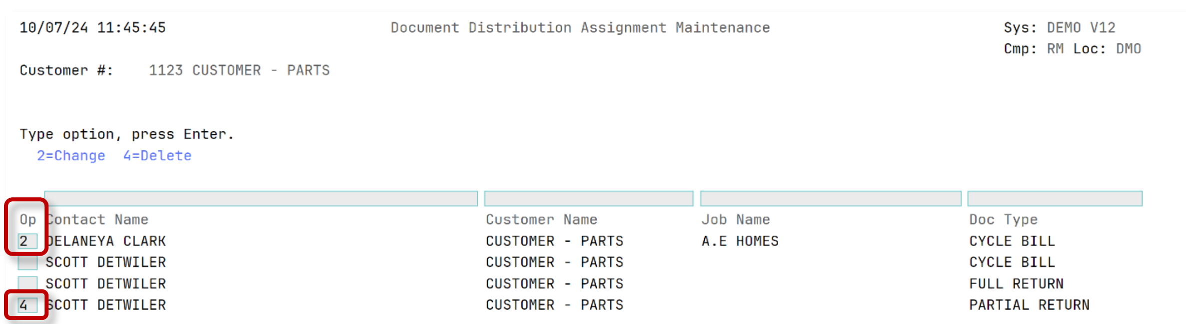
3. Type **19** in the *Op* column next to the desired customer.



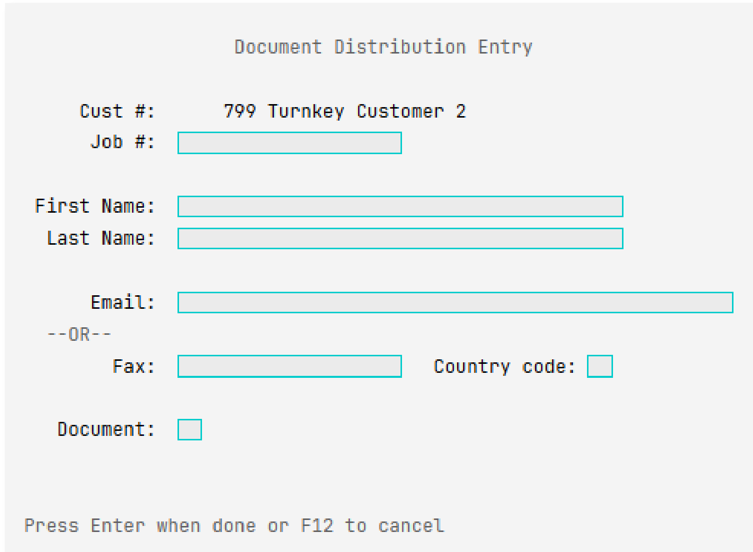
4. Press Enter.
   a. The **Document Distribution Assignment Maintenance** screen opens, listing any document distribution records in the system for the selected customer. **NOTE:** The customer in this example does not have any distribution records to date.



   b. The customer in the example below has multiple distribution records in the system.
      i. If you would like to update an existing entry, type **2** in the *Op* column to open the **Document Distribution Entry** pop-up window.
      ii. If you would like to delete an existing entry, type **4** in the *Op* column.



5. For this example, we are going to create a new entry for the first customer selected above. Press F06 on your keyboard or click on *F06 Add* in the **Display Functions** menu.
   a. The **Document Distribution Entry** pop-up window displays.



6. Type in the distribution parameters into the corresponding fields.

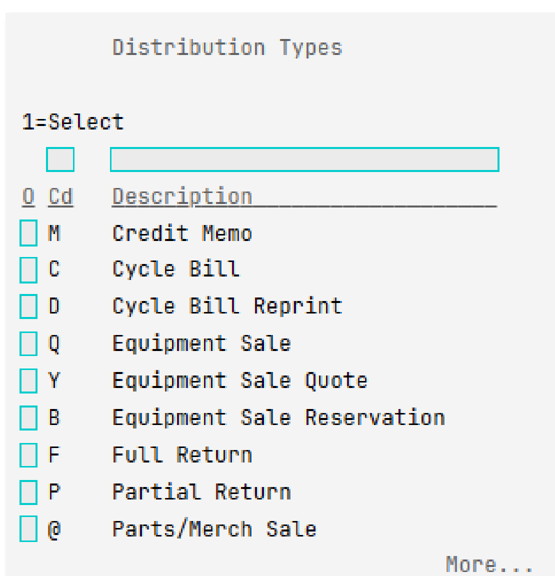
NOTE: Entering an *email address* will make this an email distribution and a fax number may not be entered.

NOTE 2: Entering a *fax number* will make this a fax distribution and an *email address* may not be entered.

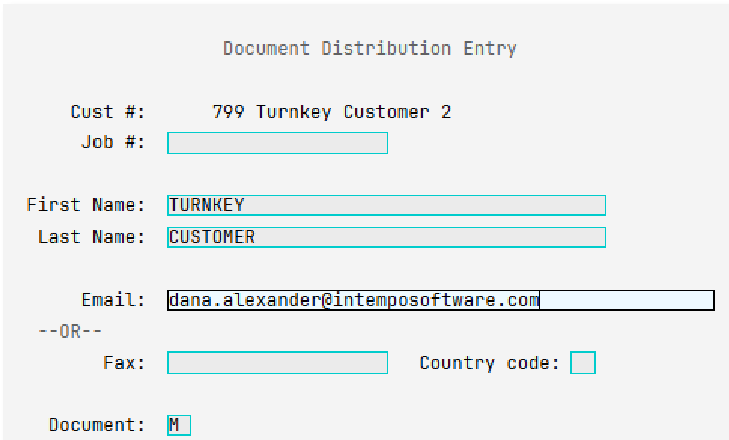
NOTE 3: The *Country Code* field is only required for fax distributions.

NOTE 4: When entering a *Document Type*, each distribution may only be assigned to one *document type*, but a *document type* may have any number of distributions assigned to it.

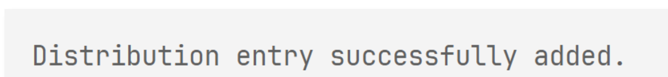
If you do not know the code you would like to use, click on the *Document* field and press F04 to open the **Distribution Types** pop-up window.



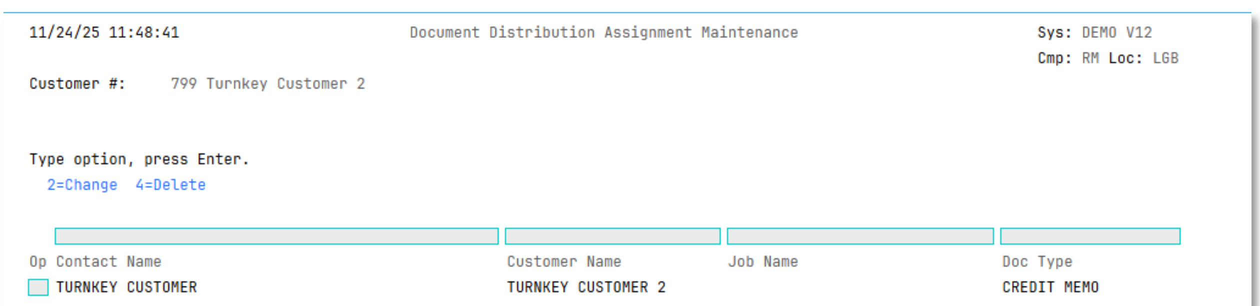
7. To select an option, <u>type</u> **1** in the *O* column and <u>press Enter</u>.
    a. The **Distribution Types** pop-up window closes, and the selected option displays in the *Document* field.



8. <u>Press Enter</u>.
    a. If your entry is successful, you will receive a corresponding message in the **Document Distribution Entry** pop-up window.



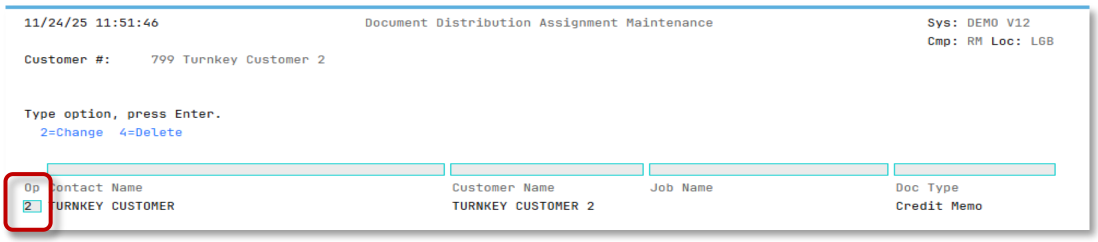
9. <u>Click on</u> the back button in the **Display Functions** menu to close the **Document Distribution Entry** pop-up window.
    a. The new entry displays in the list of assignments.



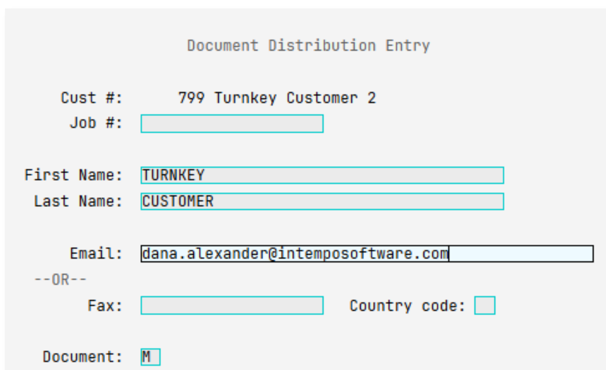
Edit a Distribution

To edit a document distribution entry, follow the steps below.

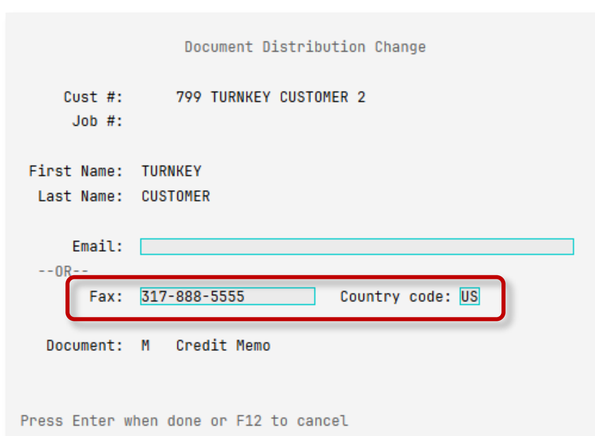
1. Navigate to the **Document Distribution Assignment Maintenance** screen for the desired customer. **NOTE:** If necessary, refer to the steps above.
2. Type **2** next to the desired entry.



3. Press Enter.
   a. The **Document Distribution Entry** pop-up window displays with details for the selected entry.

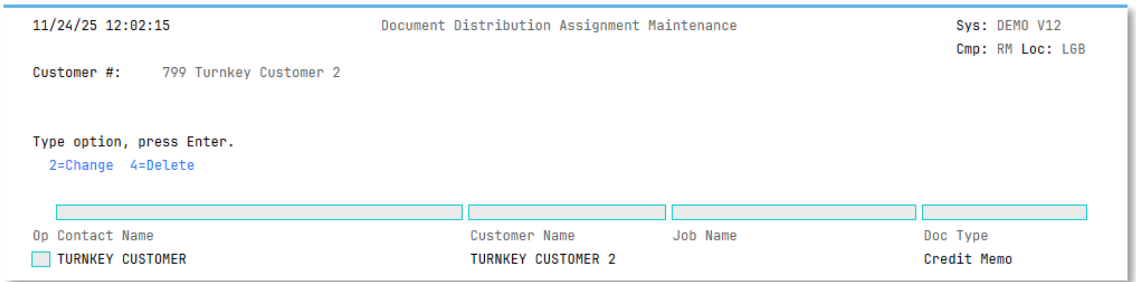


4. Update the data in the desired fields. **NOTE:** For this example, the *Fax* and *Country Code* fields were updated.



5. Press Enter.

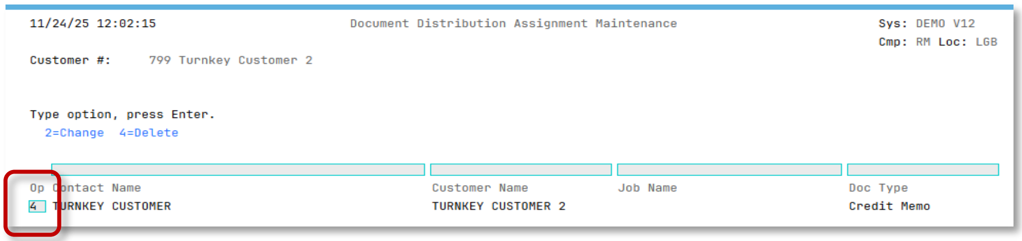
a. The **Document Distribution Entry** pop-up window closes and the entry displays in the table. **NOTE:** To verify your changes, you will need to view the entry again by typing **2** in the *Op* field next to the entry and pressing Enter.



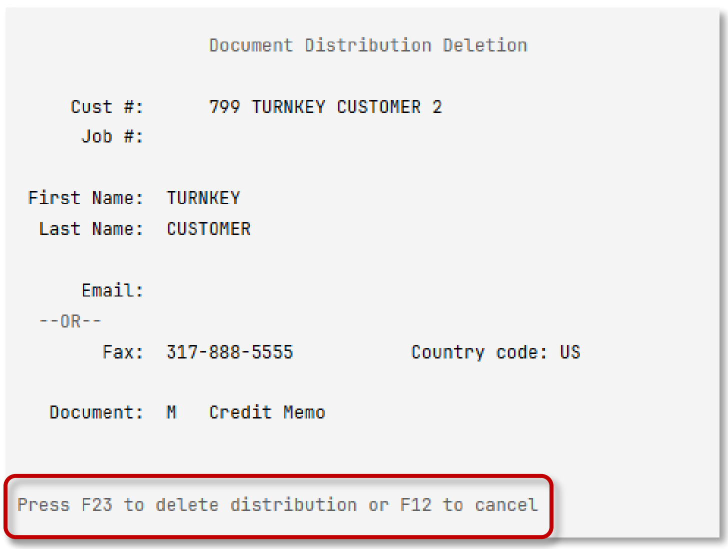
Delete a Distribution

To delete a document distribution entry, follow the steps below.

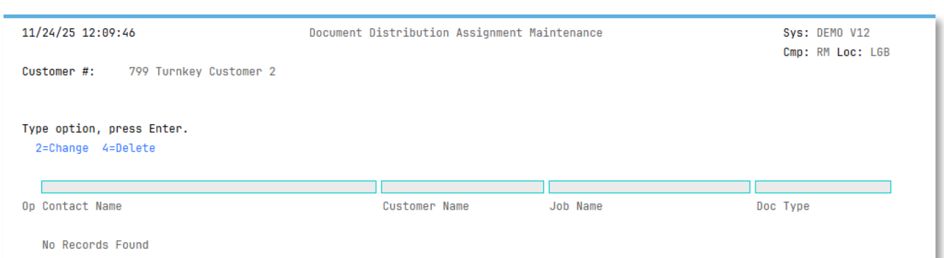
1. Navigate to the **Document Distribution Assignment Maintenance** screen for the desired customer. **NOTE:** If necessary, refer to the steps above.
2. Type **4** next to the desired entry.



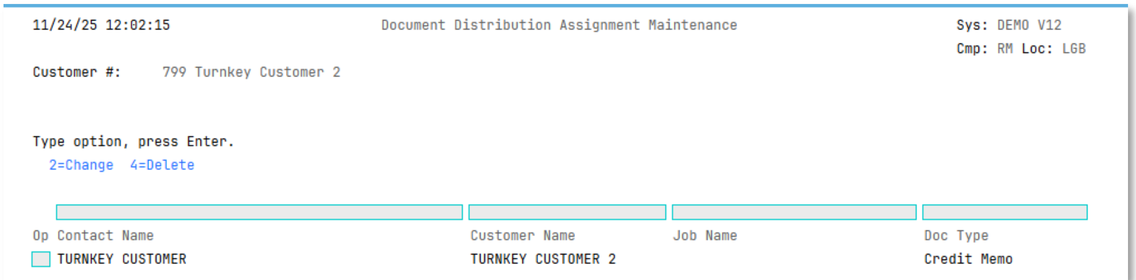
3. Press Enter.
   a. The **Document Distribution Entry** pop-up window displays with details for the selected entry in read-only mode. The message “Press F23 to delete distribution or F12 to cancel” displays in the window.



4. If you want to delete the entry, press F23 (shift+F11) on your keyboard or click on *F23 Delete* in the **Display Functions** menu.
   a. The **Document Distribution Entry** pop-up window closes, and the distribution entry no longer displays in the table.



5. To cancel, press F12 on your keyboard or click on *F12 Previous* in the **Display Functions** menu.
    a. The **Document Distribution Entry** pop-up window closes, and the distribution entry still displays in the table.



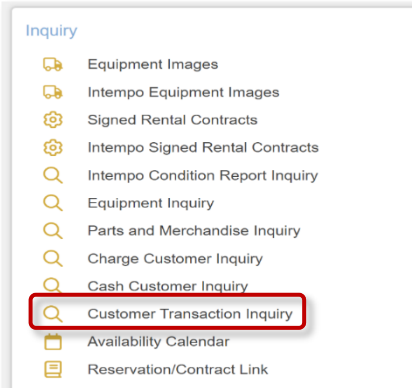
Setting up Auto Fax/Email

For this section, it is assumed that the following items are already in place for the desired Customer:

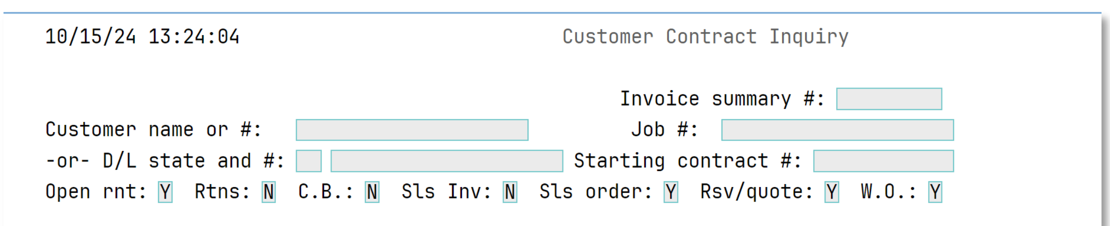
- A Document Distribution exists for the Customer and the Document Type

Process Steps

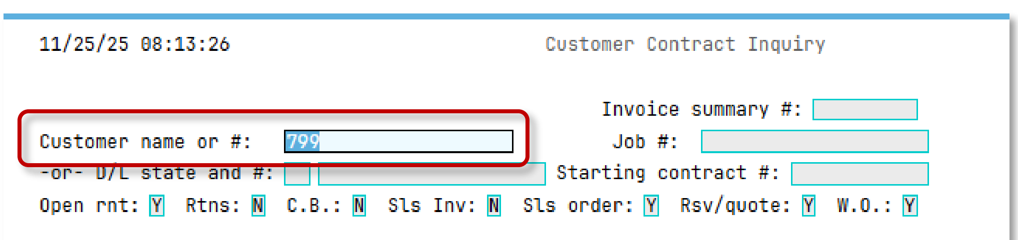
1. Log into the Roleplay environment using your credentials.
2. On the **Main Operations** screen, in the **Inquiry** section, click on **Customer Transaction Inquiry**.



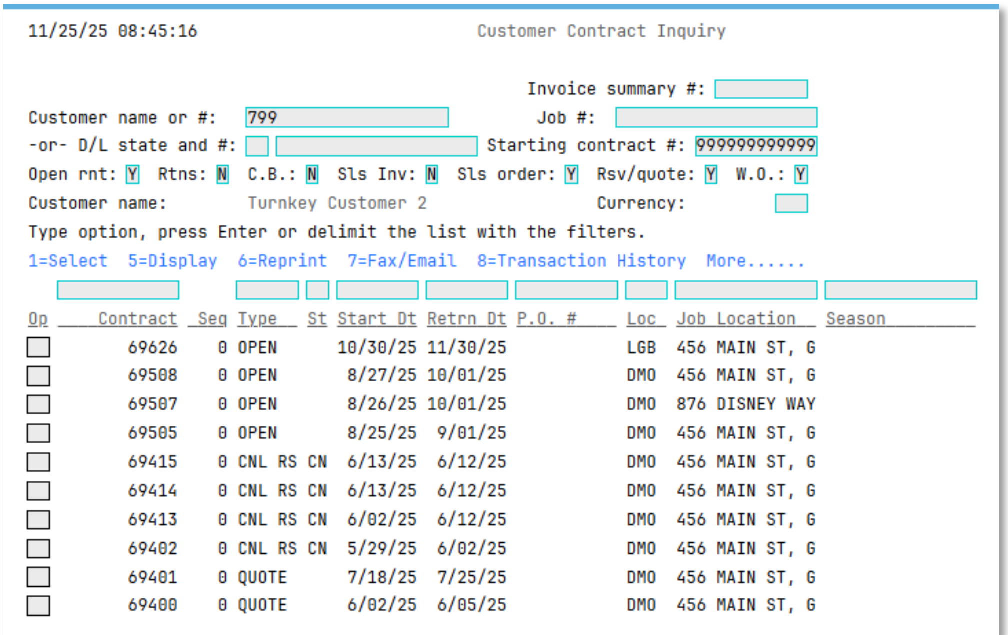
   a. The **Customer Contract Inquiry** screen displays.



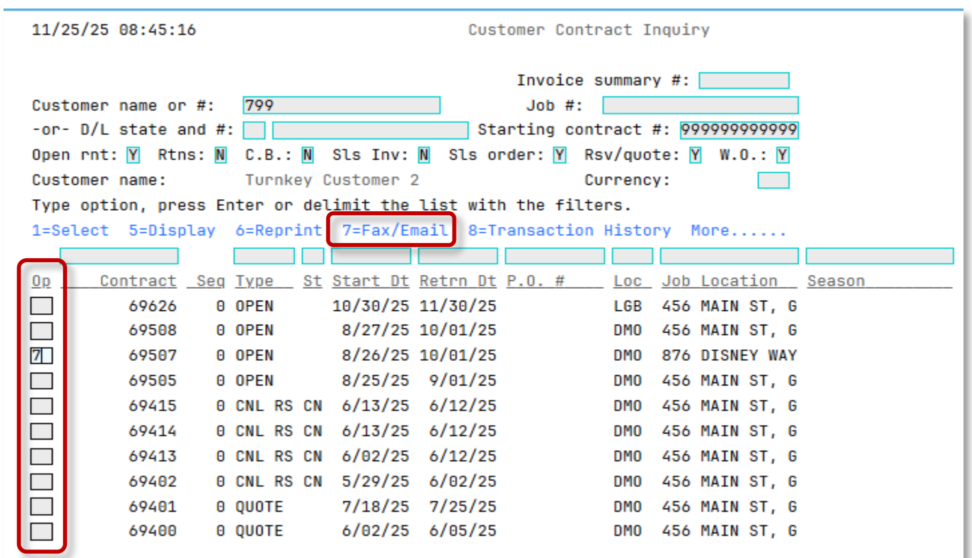
3. On this screen, you can either click in a field and press F04 to Search, or you can type in a field and press Enter.
   a. For this example, we are searching by the *Customer name or #* field.



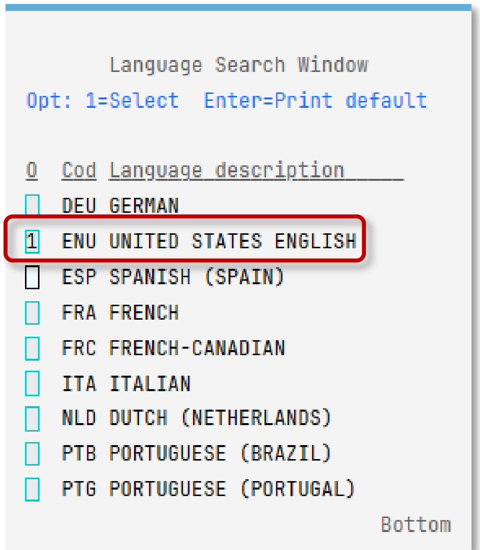
   b. The **Customer Contract Inquiry** screen refreshes displaying a list of contracts in the system for the selected Customer.



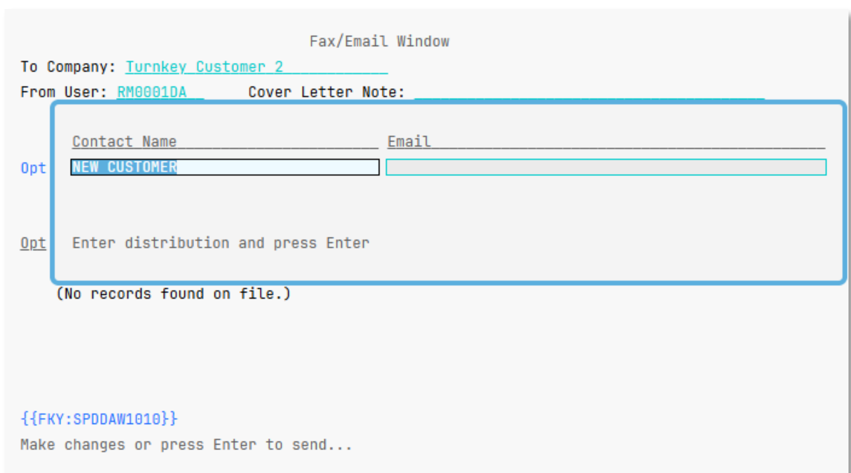
4. Type **7** for the Fax/Email option in the *Op* field next to the desired contract.



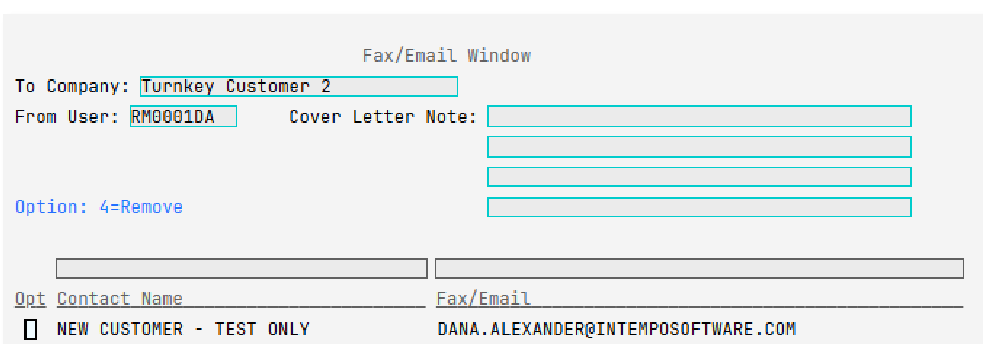
5. Press Enter.
   a. The **Language Search Window** may display where you will type **1** in the *O* column next to the desired language and press Enter. **NOTE:** If this window does not display, skip this step.



b. **The Fax/Email Window** opens for the selected contract.

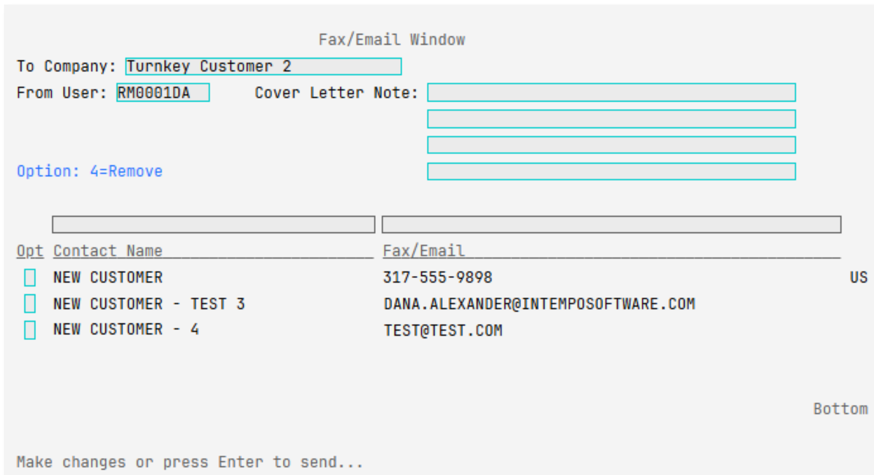


6. Type in the *Contact Name* and *Email*, pressing Enter when done.
   a. The entered information displays.



7. From here you can take the following actions:
    a. Remove a contact - <u>type</u> **4** in the *Opt* column.
    b. Add an email contact – <u>press F6</u> and <u>type in</u> the information.
    c. Add a fax contact – <u>press F7</u> and <u>type in</u> the information.

NOTE: Contacts that are removed or added in this window are only removed or added for this delivery. No lasting changes are made to the distribution list.



8. In this example, *Contact Name* “New Customer – Test Only” was deleted and will not receive an email; “New Customer” will receive a fax; and “New Customer – Test 3” and “New Customer – 4” were added to the email distribution list for this delivery only.
    a. The **Fax/Email Window** closes, and the document is sent to the corresponding contacts.

Reference Glossary

Field Definitions for Tasks

Document Distribution Assignment Maintenance

- *Contact Name* – Displays the name of the main contact for the job.
- *Customer Name* – Displays the name of the customer.
- *Job Name* – Displays the name of the job.
- *Document Type* – Displays the document distribution type for the entry.

Document Distribution Entry

- *Customer Number* – Displays the unique number assigned to the customer.
- *Job Number* – Job reference number if this distribution should apply only to a particular job.
- *First Name* – Displays the customer's first name.
- *Last Name* – Displays the customer's last name.
- *Email* – Enter the email address to which to send the contract.
- *Fax* – Enter or accept the fax number for the customer.
- *Country Code* – If applicable, enter the international FastFax country code for proper fax dialing purposes.
- *Document* – Enter the document distribution type for the entry.

Customer Contract Inquiry

- *Invoice summary number* - Enter an invoice summary number for a customer to review all of the contracts and cycle billing invoices associated with that invoice. Summarized invoicing is functionality where a customer is setup to receive only one or two invoices a month that summarize all the cycle billing activity for that month.
- *Customer name or number* - Enter the name or number assigned to the customer for whom you want to view contracts.
- *Job number* - To focus the resulting list of contracts, enter a job number to see only contracts related to that job.
- *Driver's License state* - For a cash customer, enter their driver's license state to view a list of their contracts.
- *Driver's License number* - For a cash customer, enter their driver's license number to view a list of their contracts.
- *Starting contract number* - To focus the resulting list of contracts, enter a contract number with which to start the list. Any contract numbers earlier than that number are not displayed.
- *Open rentals* - Indicate whether to include open rentals in the list.
- *Returns* - Indicate whether to include rental returns in the list.
- *Cycle billed invoices* - Indicate whether to include cycle billed invoices in the list.

- *Sales invoices* - Indicate whether to include sales invoices (as well as rental invoices) in the list.
- *Sales orders* - Indicate whether to include sales orders in the list.
- *Reservations/quotes* - Indicate whether to include rental reservations and quotes in the list.
- *Work orders* - Indicate whether to include work orders in the list.

Contract List

- *Contract* - Displays the unique number assigned to the contract.
- *Sequence* - Displays the sequence number for the contract. Sequence 0000 is a newly created contract. Once transactions occur against the contract, the sequence number increments by 1. For instance, the first cycle bill for contract 56513 could have a sequence number of 0001, resulting in a full contract number of 56513-0001.
- *Type* - Displays the type of contract such as OPEN for an open contract; EQP QT for an equipment rental quote; MN CRD for manual credit contract; and so on.
- *Status* - Displays the current status of the contract.
- *Start Date* - Displays the date the rental contract was started.
- *Return Date* - Displays the date equipment was returned or is expected to be returned on the rental contract.
- *Purchase Order Number* - If applicable, this field displays the purchase order number for the contract.
- *Location* - Displays the location that entered the contract.
- *Job Location* - Displays an abbreviated description of the location of the job for which the contract was written.