

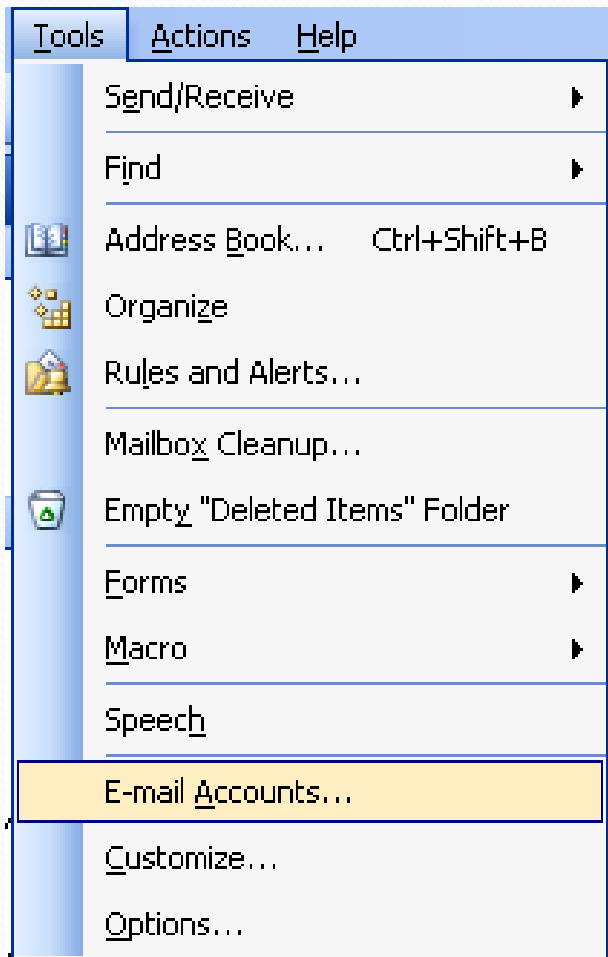
**Simplicity Software Technologies Inc.
Presents**

Setting Up the Auto E-mail Feature in Maintenance Coordinator

The following items will be discussed:

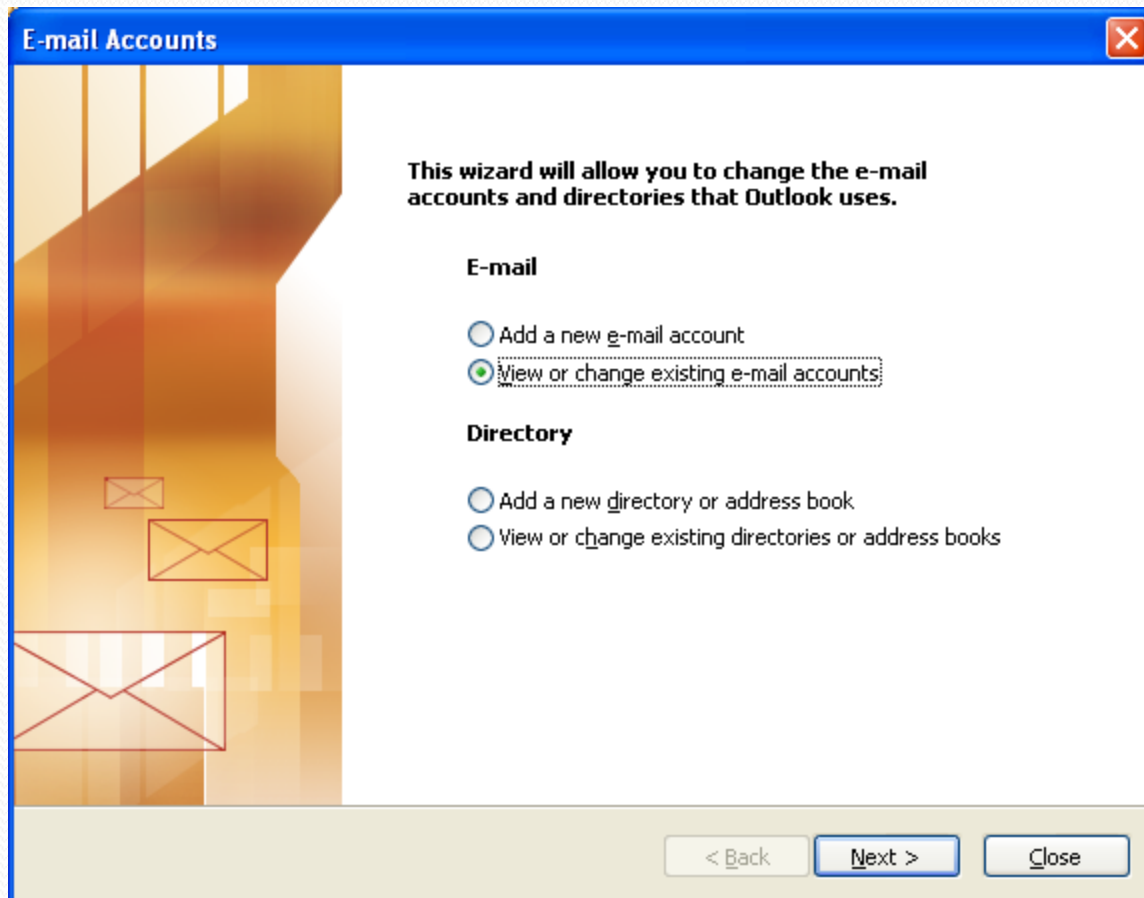
- Finding Your Existing E-Mail Settings in Outlook.
- Setting Up Maintenance Coordinator for E-Mail use.
- Setting Up a Work Order for Auto E-Mail use.
- Setting Up and Using the Auto E-Mailer module.

Finding Your Existing Settings In Microsoft Outlook



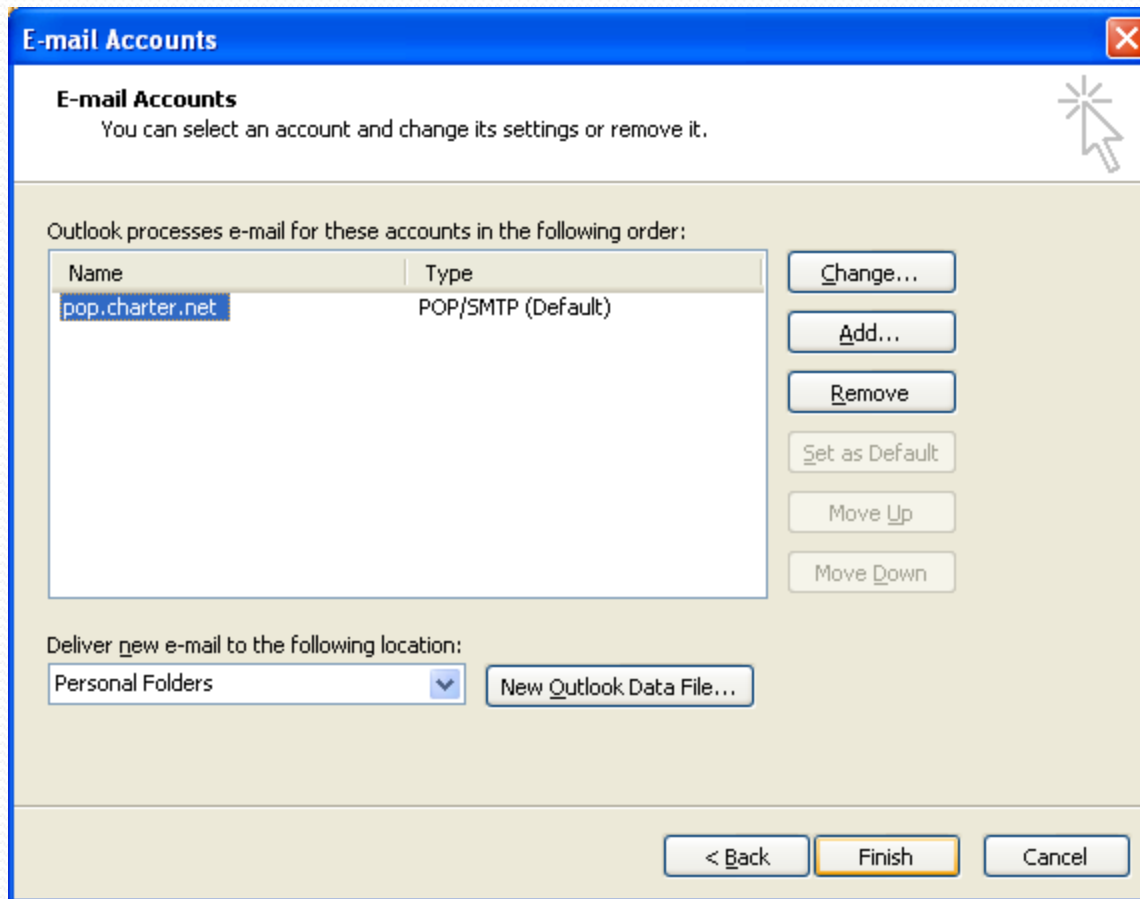
- Open or run Microsoft Outlook
- Open the Tools menu and select the “E-Mail Accounts...” option

Finding Your Existing Settings In Microsoft Outlook



- When the E-Mail Account dialog opens, select the “View or change existing e-mail accounts” option.
- Click Next

Finding Your Existing Settings In Microsoft Outlook



- Next select an existing account from those listed.
- Click on the “Change...” button.

Finding Your Existing Settings In Microsoft Outlook

E-mail Accounts

Internet E-mail Settings (POP3)
Each of these settings are required to get your e-mail account working.

User Information

Your Name: John Doe

E-mail Address: jdoe@charter.net

Server Information

Incoming mail server (POP3): pop.charter.net

Outgoing mail server (SMTP): smtp.charter.net

Logon Information

User Name: jdoe

Password: *****

☒ Remember password

☐ Log on using Secure Password Authentication (SPA)

Test Settings

After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Test Account Settings ...

More Settings ...

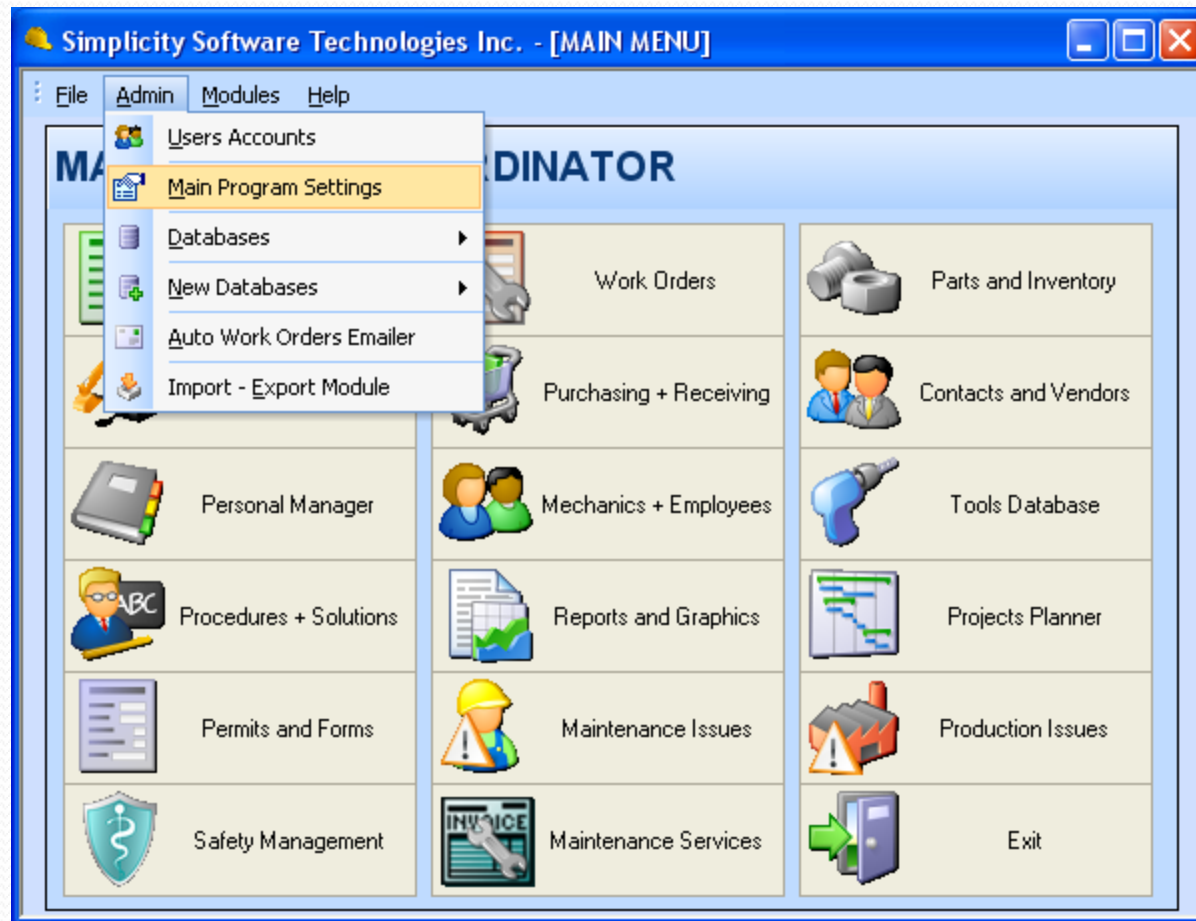
< Back Next > Cancel

Record the following information for use with Maintenance Coordinator

- Your Name
- E-Mail Address
- Outgoing mail server (SMTP)

Click the Cancel button.

Setting Up Maintenance Coordinator



- Start Maintenance Coordinator
- Open the Admin menu and select the “Program Settings..” option.

Setting Up Maintenance Coordinator

The screenshot shows the 'Program Settings' dialog box with the 'Main Application Settings' tab selected. The 'E-Mail' sub-tab is active. At the top, there is a checkbox labeled 'Use Outlook or Outlook Express for Outgoing Mail' which is unchecked. Below this is a section titled 'Outgoing E-mail Setup (Other than Outlook)'. Inside this section, there are two sub-sections: 'User Information' and 'Server Information'. Under 'User Information', the 'User Name' field contains 'Maintenance Dept' and the 'E-mail Address' field contains 'jdoe@myserever.net'. Under 'Server Information', the 'Outgoing mail server (SMTP)' field contains 'smtp.myserver.net'. At the bottom of the dialog, there are two buttons: 'OK - Save' with a green checkmark icon and 'End Program' with a red stop sign icon.

Program Settings

Main Application Settings

Company | **E-Mail** | Display/Reports | ISO Documents | Main Databases Setup | Add-On Database Setup

☐ Use Outlook or Outlook Express for Outgoing Mail

Outgoing E-mail Setup (Other than Outlook)

User Information (E-mail From Information)

User Name: Maintenance Dept

E-mail Address: jdoe@myserever.net

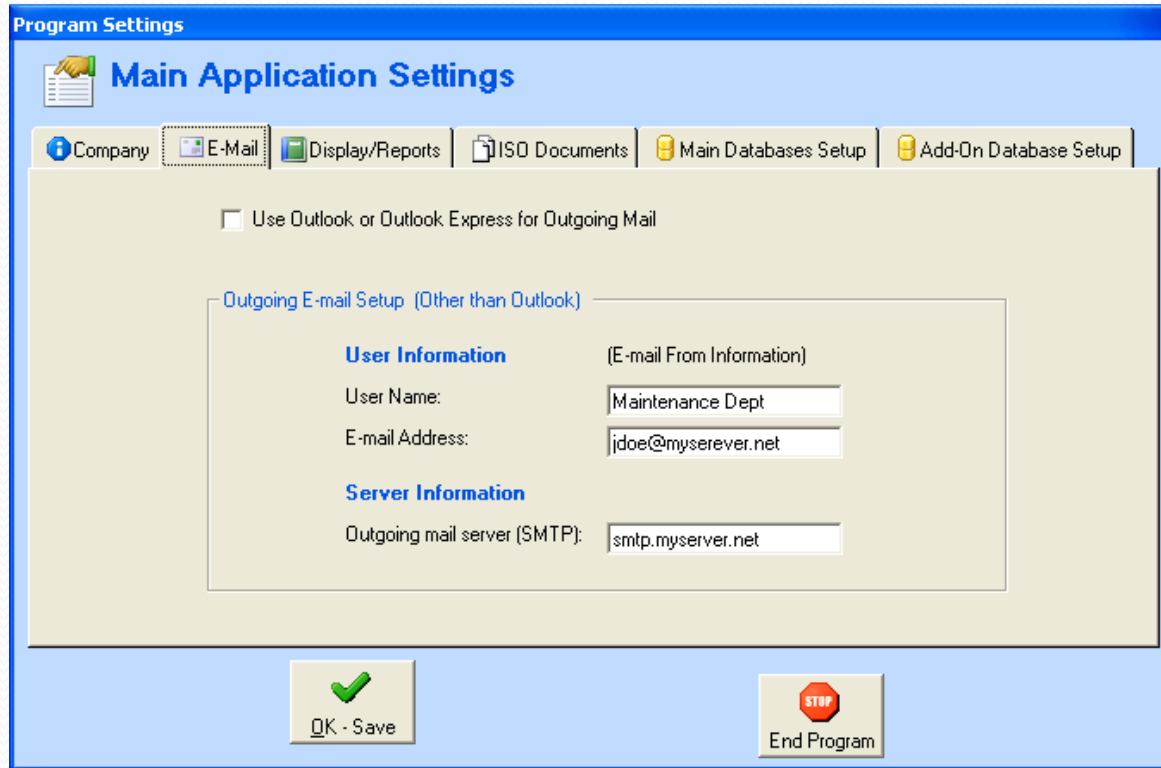
Server Information

Outgoing mail server (SMTP): smtp.myserver.net

OK - Save End Program

- After the Program Settings dialog loads, click on the E-Mail tab.
- Uncheck the “Use Outlook or Outlook Express for Outgoing Mail” checkbox

Setting Up Maintenance Coordinator



The screenshot shows the 'Program Settings' dialog box with the 'Main Application Settings' tab selected. The 'E-Mail' sub-tab is active. A checkbox labeled 'Use Outlook or Outlook Express for Outgoing Mail' is unchecked. Below it, the 'Outgoing E-mail Setup (Other than Outlook)' section contains two sub-sections: 'User Information' and 'Server Information'. Under 'User Information', 'User Name' is set to 'Maintenance Dept' and 'E-mail Address' is set to 'jdoe@myserver.net'. Under 'Server Information', 'Outgoing mail server (SMTP)' is set to 'smtp.myserver.net'. At the bottom, there are two buttons: 'OK - Save' (with a green checkmark icon) and 'End Program' (with a red stop sign icon).

Program Settings

Main Application Settings

Company | **E-Mail** | Display/Reports | ISO Documents | Main Databases Setup | Add-On Database Setup

☐ Use Outlook or Outlook Express for Outgoing Mail

Outgoing E-mail Setup (Other than Outlook)

User Information (E-mail From Information)

User Name: Maintenance Dept

E-mail Address: jdoe@myserver.net

Server Information

Outgoing mail server (SMTP): smtp.myserver.net

OK - Save End Program

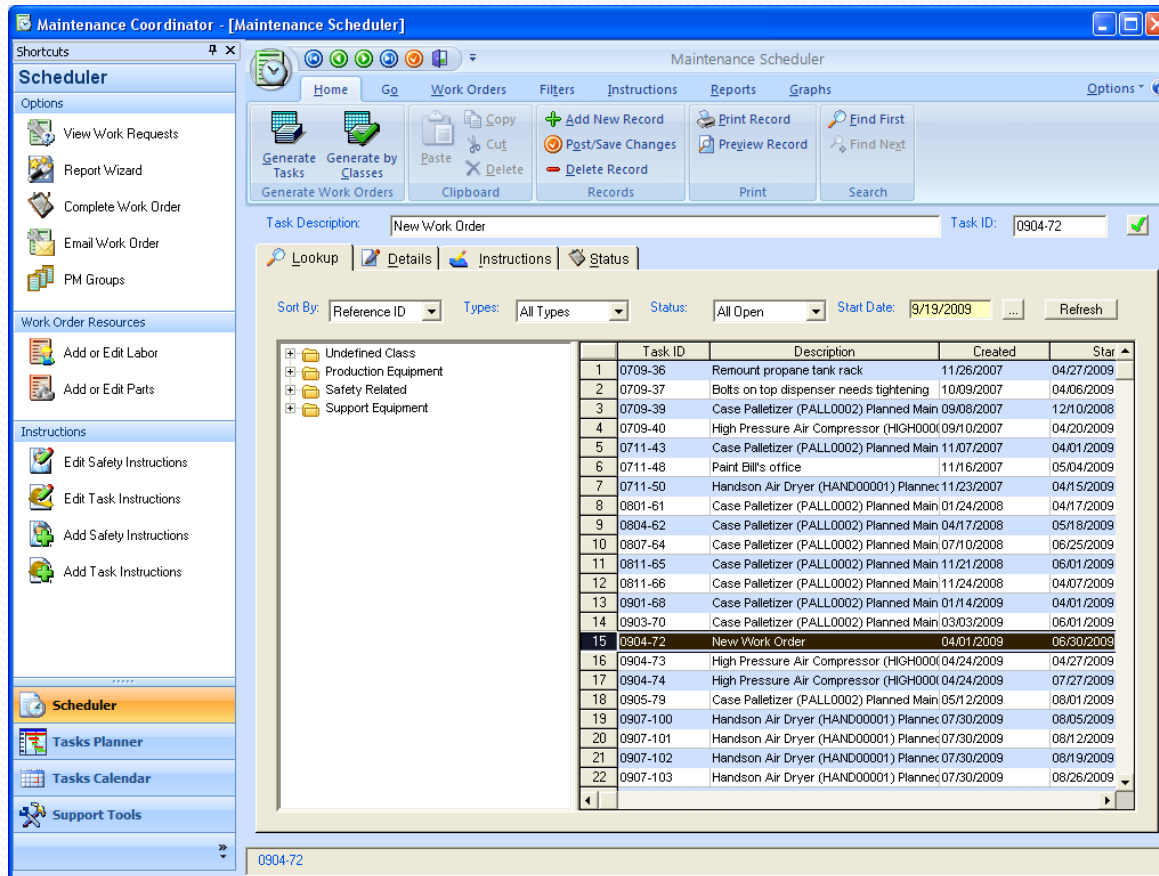
Enter the following information just as it appeared in Outlook:

- Your Name
- E-Mail Address
- Outgoing mail server (SMTP)

Click on the “OK – Save” button.

MAINTENACE COORDINATOR IS NOW SETUP FOR E-MAIL USE.

Setting Up a Work Order for Auto E-Mail Use



Start the Maintenance Scheduler module and perform the following:

- Create a new Work Order document
- Move to the Details tab.

Setting Up a Work Order for Auto E-Mail Use

Maintenance Coordinator - [Maintenance Scheduler]

Shortcuts

Scheduler

Options

- View Work Requests
- Report Wizard
- Complete Work Order
- Email Work Order
- PM Groups

Work Order Resources

- Add or Edit Labor
- Add or Edit Parts

Instructions

- Edit Safety Instructions
- Edit Task Instructions
- Add Safety Instructions
- Add Task Instructions

Scheduler

Tasks Planner

Tasks Calendar

Support Tools

Maintenance Scheduler

Home Go Work Orders Filters Instructions Reports Graphs Options

Generate Tasks Generate by Classes Generate Work Orders

Paste Cut Copy Delete

Add New Record Post/Save Changes Delete Record

Print Record Preview Record Print

Find First Find Next

Task Description: Bolts on top dispenser needs tightening Task ID: 0709-37

Lookup Details Instructions Status

Task Type

Standard Work Order

Task Priority: 3

Est. Down Time:

Scheduling

Date: 10/9/2007

Scheduled Start: 4/6/2009

Scheduled End: 4/9/2009

Start Time: 8:00 AM

Ending Time: 5:00 PM

Recurring Setup

Frequency: None

Every XX Criteria: 2147483647

☐ Generate New When Done

☒ Do Not Generate New Task

Machine Assignment

Case Palletizer

PALL0002

Select Client/Equipment

John Nelson and Associates

Work Requested By

Griggs, Fred

Requester E-Mail

Personnel Assignments

Assignments Options Attach Audits

Classification Assignment

Color Scheme: 33023

Support Equipment

Account Assignment

Project Assignment

Parts and Labor Assignments

Edit Work Order Parts

Edit Work Order Labor

0709-37

Move to the Personnel Assignments section and add an employee or mechanic to this work order.

Before adding the employee however, ensure that they have a valid e-mail address setup in the system. You can't send an e-mail to someone that doesn't have e-mail.

Setting Up a Work Order for Auto E-Mail Use

Maintenance Coordinator - [Maintenance Scheduler]

Shortcuts

Scheduler

Options

View Work Requests

Report Wizard

Complete Work Order

Email Work Order

PM Groups

Work Order Resources

Add or Edit Labor

Add or Edit Parts

Instructions

Edit Safety Instructions

Edit Task Instructions

Add Safety Instructions

Add Task Instructions

Scheduler

Tasks Planner

Tasks Calendar

Support Tools

Maintenance Scheduler

Home Go Work Orders Filters Instructions Reports Graphs Options

Generate Tasks Generate by Classes Generate Work Orders

Paste Cut Copy Delete

Clipboard

Records

Add New Record Post/Save Changes Delete Record

Print Record Preview Record

Print

Find First Find Next

Search

Task Description: Bolts on top dispenser needs tightening Task ID: 0709-37

Lookup Details Instructions Status

Task Type

Standard Work Order

Task Priority 3

Est. Down Time:

Scheduling

Date: 10/9/2007

Scheduled Start: 4/6/2009

Scheduled End: 4/9/2009

Start Time: 8:00 AM

Ending Time: 5:00 PM

Recurring Setup

Frequency: None

Every XX Criteria: 2147483647

☐ Generate New When Done

☒ Do Not Generate New Task

Machine Assignment

Case Palletizer

PALL002

Select Client/Equipment

John Nelson and Associates

Personnel Assignments

Work Requested By

Griggs, Fred

Requester E-Mail

Assignments Options Attach Audits

Special Fields

Field Captions: Field Values:

Automatic Email

☒ Use Auto Email Feature

☐ Prevent Future Emails for this Work Order Only

PM Grouping

☐ PM Group Member

Retrieve Current Schedule

0709-37

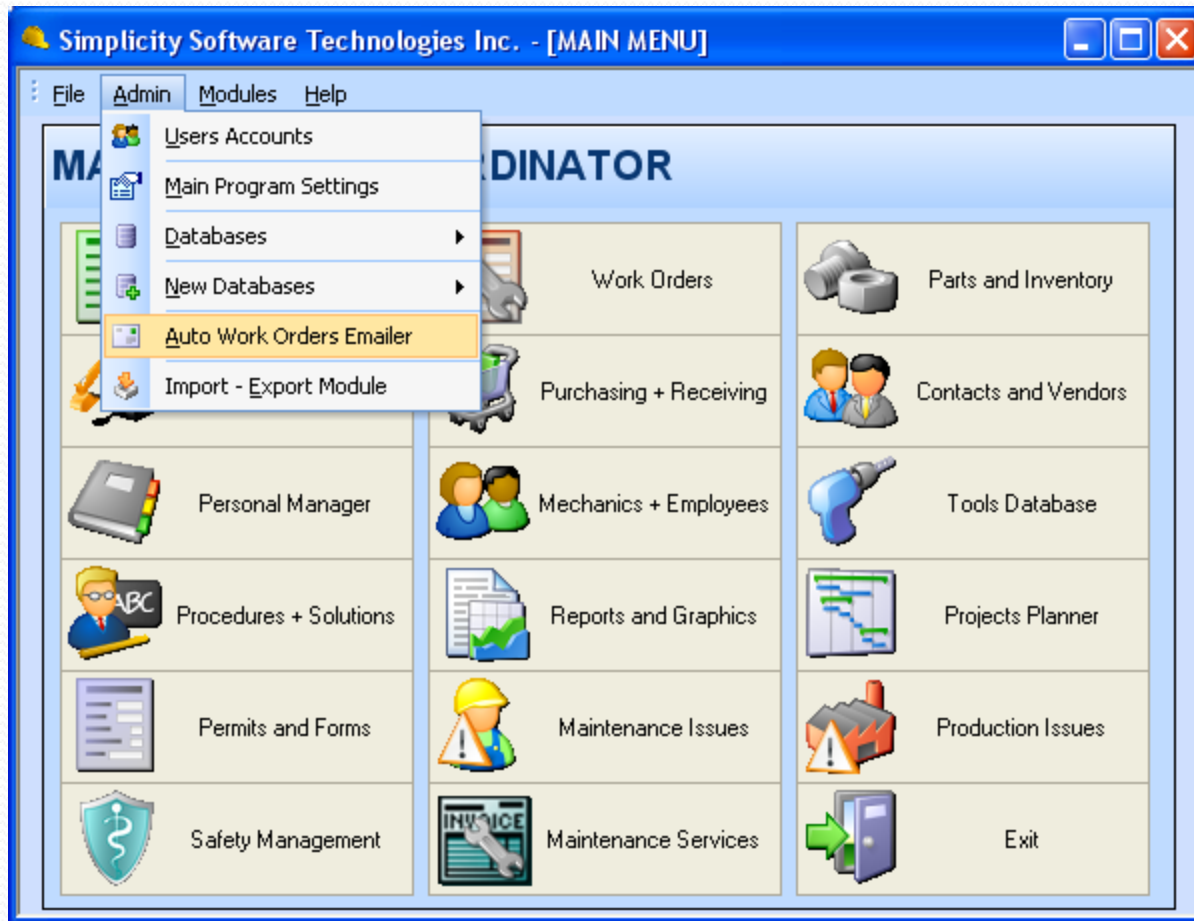
- Click on the ‘Options’ tab near the bottom of screen.
- Place a checkmark in the “Use Auto Email Feature” check box.
- Remove any checks in the “Prevent Future Emails for this Work Order Only” check box.

Setting Up a Work Order for Auto E-Mail Use

The screenshot displays the 'Maintenance Coordinator - [Maintenance Scheduler]' application. The left sidebar contains a 'Scheduler' section with options like 'View Work Requests', 'Report Wizard', 'Complete Work Order', 'Email Work Order', and 'PM Groups'. Below this are 'Work Order Resources' and 'Instructions'. The main area shows a task description 'Bolts on top dispenser needs tightening' and Task ID '0709-37'. The 'Task Type' is set to 'Standard Work Order' with a priority of 3. The 'Scheduling' section shows a date of 10/9/2007, scheduled start of 4/6/2009, and end of 4/9/2009. The 'Recurring Setup' section is configured with 'Frequency: None' and 'Every XX Criteria: 2147483647'. The 'Personnel Assignments' section is empty. The 'Work Requested By' section shows 'Griggs, Fred' as the requester. The 'Machine Assignment' section shows 'Case Palletizer' and 'PALL0002'. The bottom section includes 'Classification Assignment' (Color Scheme: 33023, Support Equipment), 'Account Assignment', 'Project Assignment', and 'Parts and Labor Assignments'.

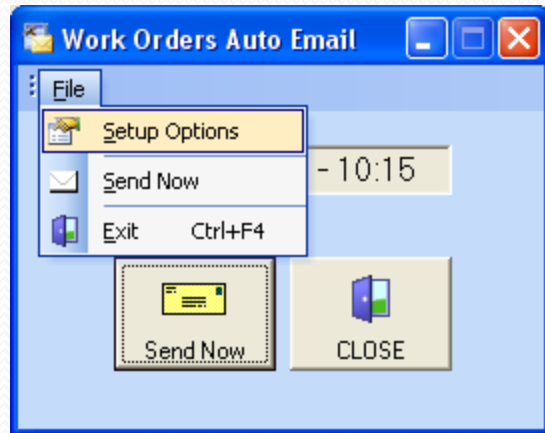
- Setup your Schedule Start and End Dates for this work order for sometime in the future.
- This work order is now ready for Auto E-mail use.
- Close the Scheduler.

Setting Up the Auto E-Mailer



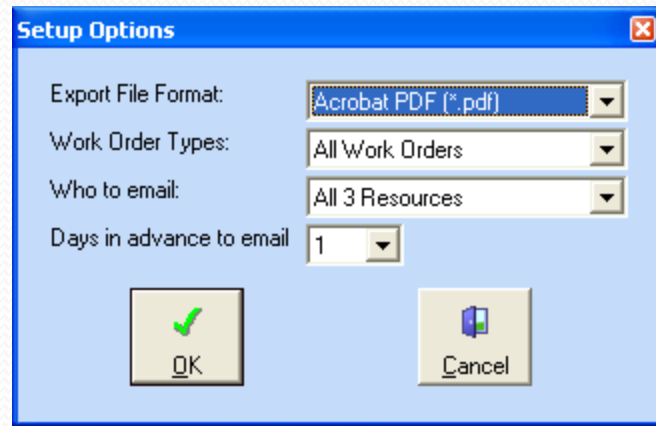
- From the Main Menu screen open the 'Admin' menu and select the "Auto Work Orders Emler" option.

Setting Up the Auto E-Mailer



- Open the “File” menu and select the “Setup Options” option.

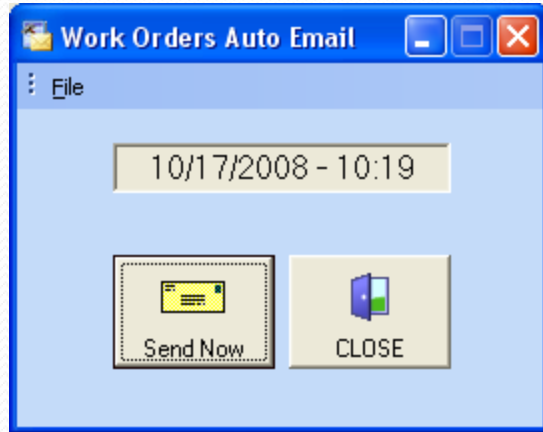
Setting Up the Auto E-Mailer



- Move to the various fields of this setup dialog and setup the criteria to your satisfaction.
- Click the “OK” button when done.

- Export File Format – This is the e-mail work order attachment file type. Either PDF or RFT (The file to be sent).
- Work Order Types – Recurring, Single Shot (Repair), or both.
- Who to email – The person or persons to email a copy of the work order when it becomes due.
- Days in advance to email – Mail a copy of the work order the day it's due or up to 7-days in advance.

We're Done!



- Minimize the Work Orders Auto E-Mailer and let it run in the background.

The Auto E-Mailer will check the database around every 15 minutes or so to see if there are any new work orders ready to be mailed out. If it finds one it will mail it out as setup, and all automatically.