

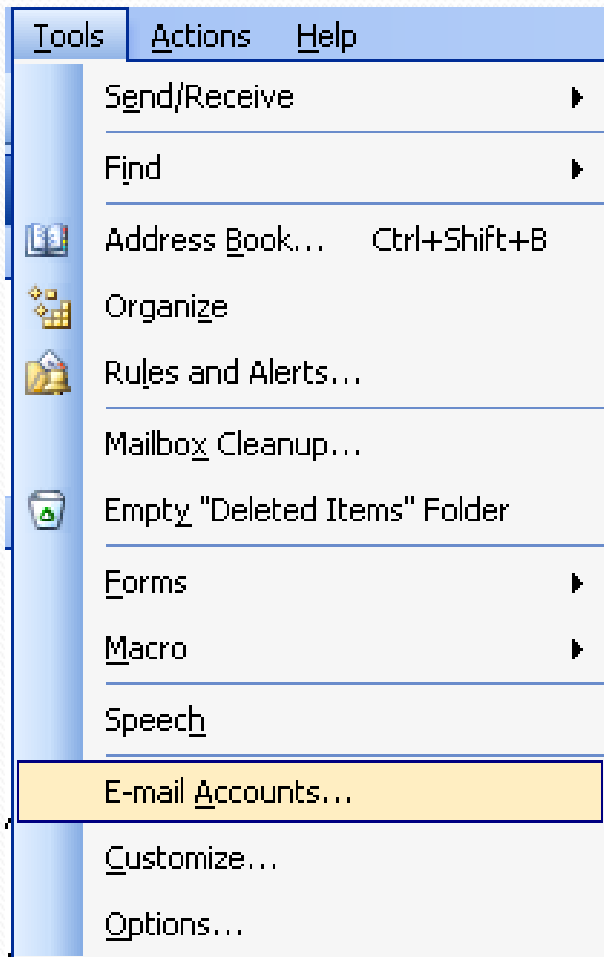
**Simplicity Software Technologies Inc.  
Presents**

**Setting Up the Auto E-mail  
Feature in Maintenance  
Coordinator**

# The following items will be discussed:

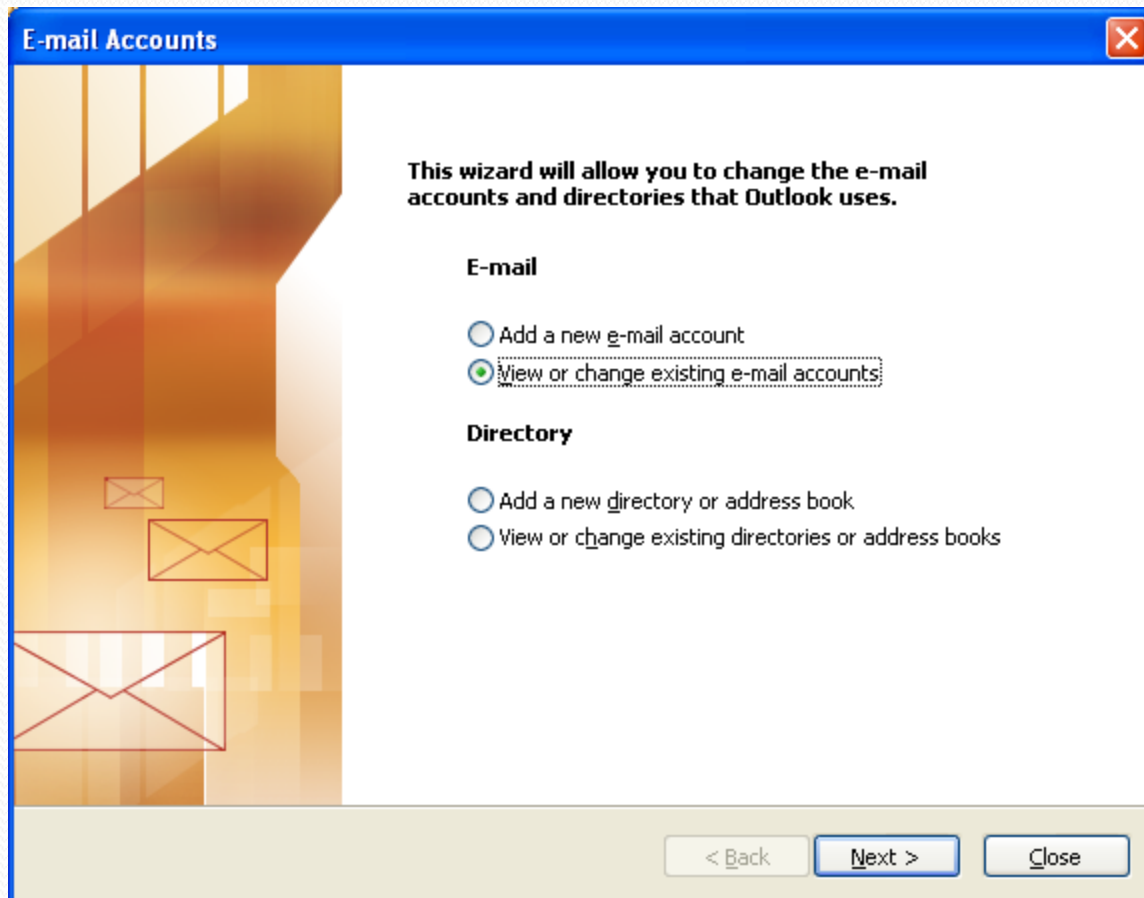
- Finding Your Existing E-Mail Settings in Outlook.
- Setting Up Maintenance Coordinator for E-Mail use.
- Setting Up a Work Order for Auto E-Mail use.
- Setting Up and Using the Auto E-Mailer module.

# Finding Your Existing Settings In Microsoft Outlook



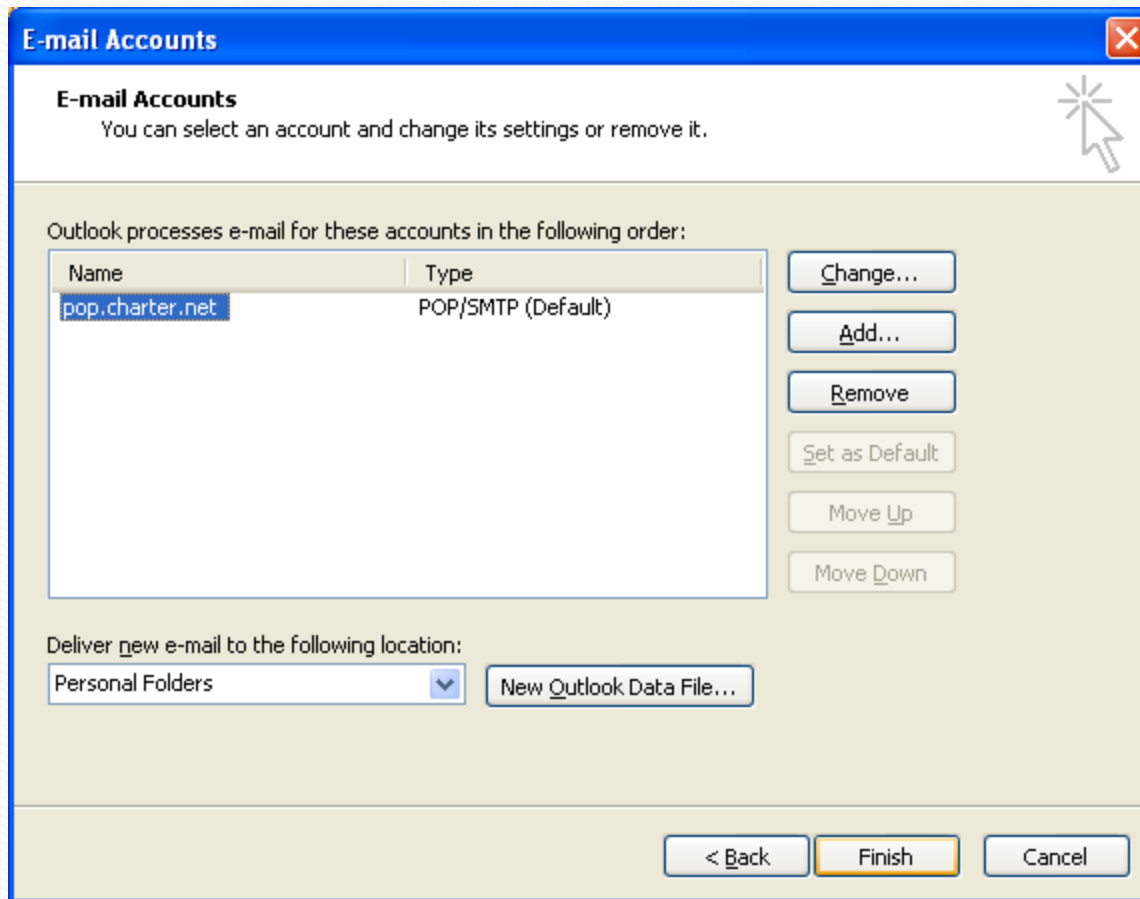
- Open or run Microsoft Outlook
- Open the Tools menu and select the “E-Mail Accounts...” option

# 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:

E-mail Address:

**Server Information**

Incoming mail server (POP3):

Outgoing mail server (SMTP):

**Logon Information**

User Name:

Password:

Remember password

Log on using Secure Password Authentication (SPA)

**Test Settings**

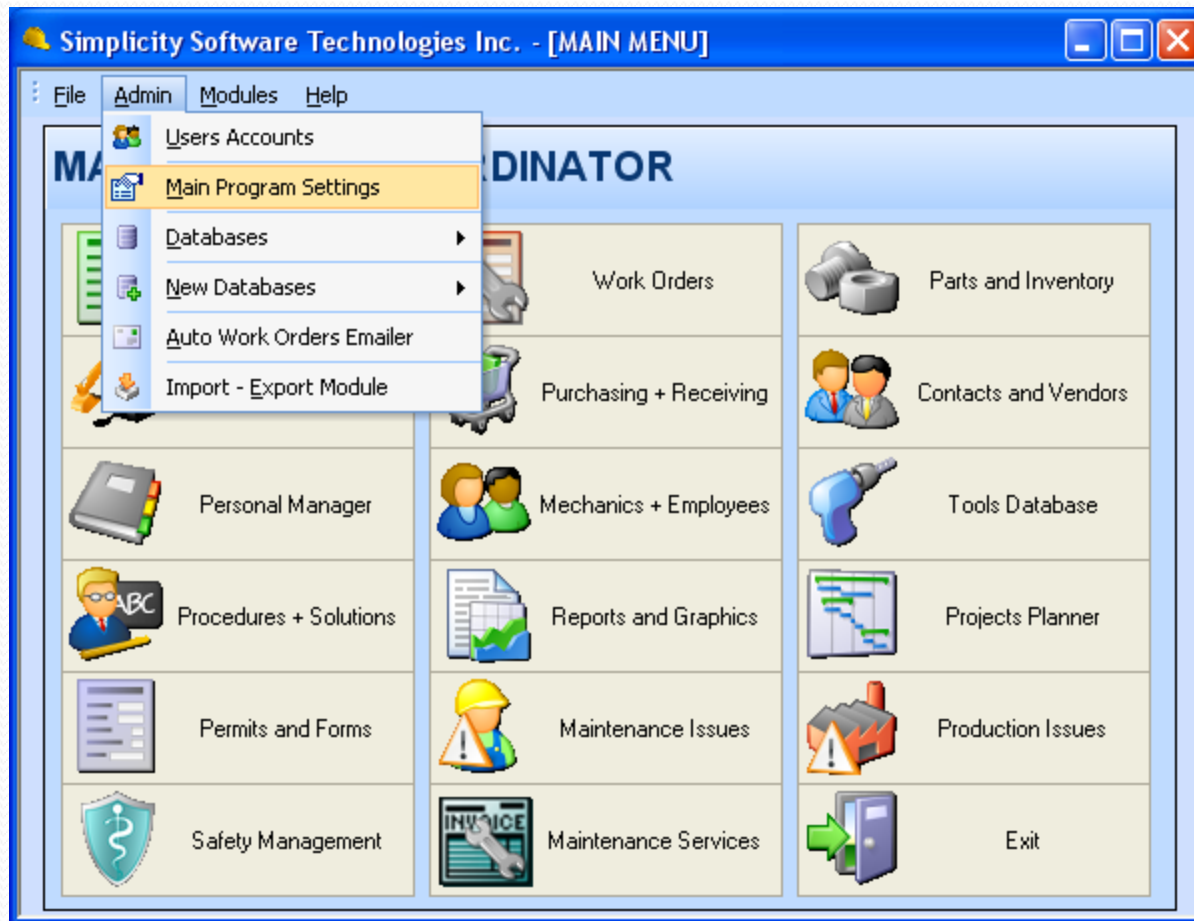
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

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

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

- 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 for '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'. The 'User Information' section includes 'User Name' (Maintenance Dept) and 'E-mail Address' (jdoe@myserever.net). The 'Server Information' section includes 'Outgoing mail server (SMTP)' (smtp.myserever.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@myserever.net

**Server Information**

Outgoing mail server (SMTP): smtp.myserever.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

The screenshot shows the Maintenance Scheduler application window. The interface includes a sidebar with navigation options like 'View Work Requests', 'Report Wizard', and 'Email Work Order'. The main area features a toolbar with actions such as 'Add New Record', 'Post/Save Changes', and 'Delete Record'. Below the toolbar, there are filters for 'Task ID', 'Task Description', and 'Task ID: 0904-72'. A table of work orders is displayed, with the entry '0904-72 New Work Order' highlighted in blue. The table columns are Task ID, Description, Created, and Star.

Task ID	Description	Created	Star
1	Remount propane tank rack	11/26/2007	04/27/2009
2	Bolts on top dispenser needs tightening	10/09/2007	04/06/2009
3	Case Palletizer (PALL0002) Planned Main	09/08/2007	12/10/2008
4	High Pressure Air Compressor (HIGH000) 09/10/2007	09/10/2007	04/20/2009
5	Case Palletizer (PALL0002) Planned Main	11/07/2007	04/01/2009
6	Paint Bill's office	11/16/2007	05/04/2009
7	Handson Air Dryer (HAND00001) Planne	11/23/2007	04/15/2009
8	Case Palletizer (PALL0002) Planned Main	01/24/2008	04/17/2009
9	Case Palletizer (PALL0002) Planned Main	04/17/2008	05/18/2009
10	Case Palletizer (PALL0002) Planned Main	07/10/2008	06/25/2009
11	Case Palletizer (PALL0002) Planned Main	11/21/2008	06/01/2009
12	Case Palletizer (PALL0002) Planned Main	11/24/2008	04/07/2009
13	Case Palletizer (PALL0002) Planned Main	01/14/2009	04/01/2009
14	Case Palletizer (PALL0002) Planned Main	03/03/2009	06/01/2009
15	New Work Order	04/01/2009	06/30/2009
16	High Pressure Air Compressor (HIGH000) 04/24/2009	04/24/2009	04/27/2009
17	High Pressure Air Compressor (HIGH000) 04/24/2009	04/24/2009	07/27/2009
18	Case Palletizer (PALL0002) Planned Main	05/12/2009	08/01/2009
19	Handson Air Dryer (HAND00001) Planne	07/30/2009	08/05/2009
20	Handson Air Dryer (HAND00001) Planne	07/30/2009	08/12/2009
21	Handson Air Dryer (HAND00001) Planne	07/30/2009	08/19/2009
22	Handson Air Dryer (HAND00001) Planne	07/30/2009	08/26/2009

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

The screenshot shows the 'Maintenance Scheduler' application window. The title bar reads 'Maintenance Coordinator - [Maintenance Scheduler]'. The interface includes a left-hand navigation pane with sections for 'Scheduler', 'Work Order Resources', and 'Instructions'. The main workspace is divided into several panels:

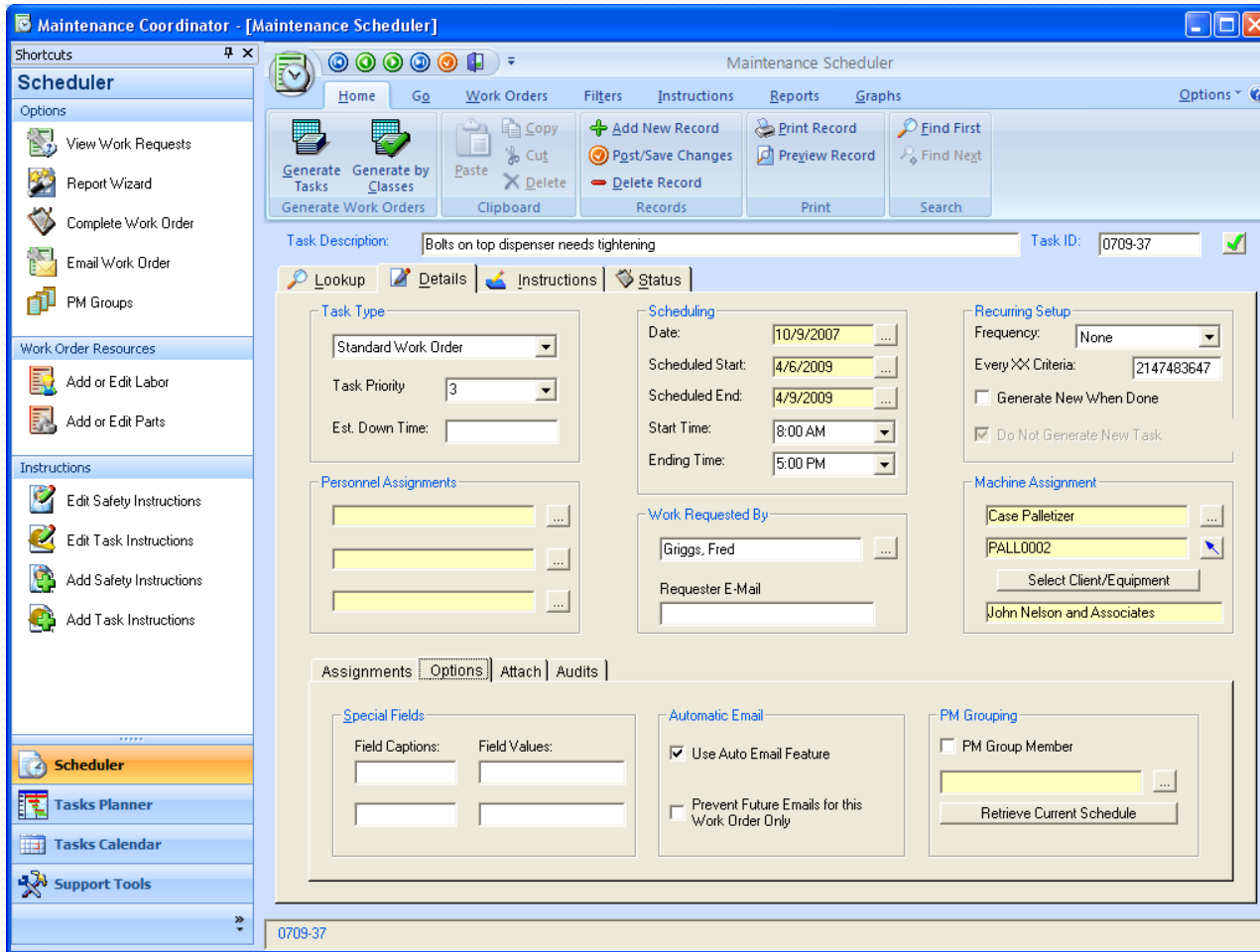
- Task Description:** 'Bolts on top dispenser needs tightening' and 'Task ID: 0709-37'.
- Task Type:** 'Standard Work Order', 'Task Priority: 3', and 'Est. Down Time'.
- Scheduling:** 'Date: 10/9/2007', 'Scheduled Start: 4/6/2009', 'Scheduled End: 4/9/2009', 'Start Time: 8:00 AM', and 'Ending Time: 5:00 PM'.
- Recurring Setup:** 'Frequency: None', 'Every XX Criteria: 2147483647', and checkboxes for 'Generate New When Done' (unchecked) and 'Do Not Generate New Task' (checked).
- Personnel Assignments:** A list of three empty slots.
- Work Requested By:** 'Griggs, Fred'.
- Requester E-Mail:** An empty text field.
- Machine Assignment:** 'Case Palletizer', 'PALL0002', and 'John Nelson and Associates'.
- Assignments:** 'Classification Assignment' (Color Scheme: 33023, Support Equipment), 'Account Assignment', 'Project Assignment', and 'Parts and Labor Assignments' (Edit Work Order Parts, Edit Work Order Labor).

The status bar at the bottom left shows the task ID '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



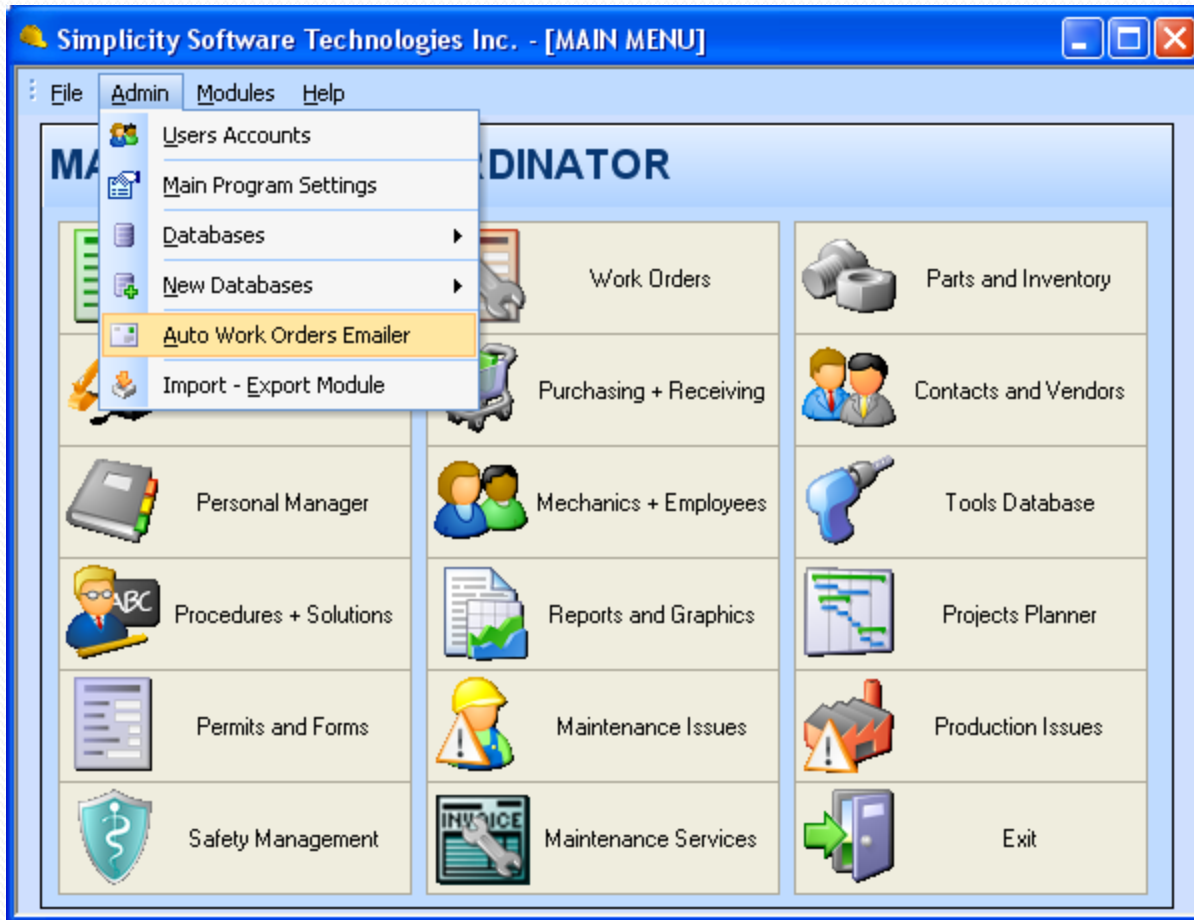
- Click on the “Options” tab near the bottom of screen.
- Place a checkmark in the “Use Auto Email Feature” check box.
- Remove any checks in the “Prevent Future Emails for this Work Order Only” check box.

# Setting Up a Work Order for Auto E-Mail Use

The screenshot shows the 'Maintenance Scheduler' window in the 'Maintenance Coordinator' application. The window title is 'Maintenance Coordinator - [Maintenance Scheduler]'. The interface includes a 'Shortcuts' sidebar on the left with options like 'View Work Requests', 'Report Wizard', 'Complete Work Order', 'Email Work Order', and 'PM Groups'. The main area has a ribbon with tabs for 'Home', 'Go', 'Work Orders', 'Filters', 'Instructions', 'Reports', and 'Graphs'. The 'Work Orders' tab is active, showing a 'Task Description' of 'Bolts on top dispenser needs tightening' and a 'Task ID' of '0709-37'. Below this, there are sections for 'Task Type' (Standard Work Order), '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 criteria: 2147483647), 'Personnel Assignments', 'Work Requested By' (Griggs, Fred), 'Machine Assignment' (Case Palletizer, PALL0002), and 'Assignments' (Classification Assignment: Color Scheme 33023, Support Equipment, Account Assignment, Project Assignment, and Parts and Labor Assignments). The status bar at the bottom shows '0709-37'.

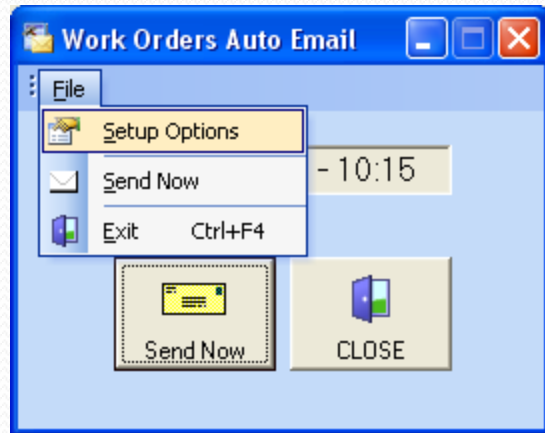
- Setup your Schedule Start and End Dates for this work order for sometime in the future.
- This work order is now ready for Auto E-mail use.
- Close the Scheduler.

# Setting Up the Auto E-Mailer



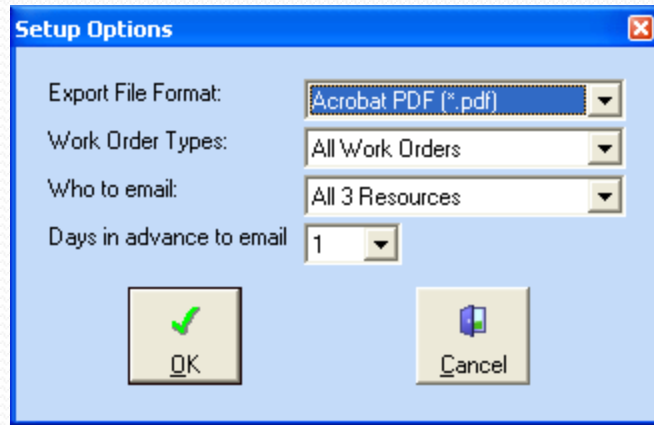
- From the Main Menu screen open the ‘Admin’ menu and select the “Auto Work Orders Emailer” option.

# Setting Up the Auto E-Mailer



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

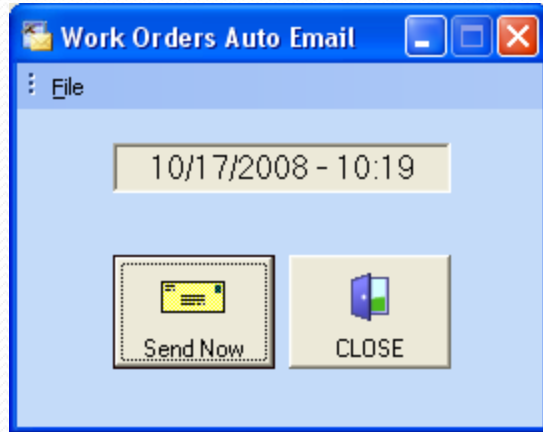
# Setting Up the Auto E-Mailer



- 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.