



# Computerized Tire Dealer Information Systems

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# Automation For Text Messages E-Mail Messages From Within The JMK Application

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This feature allows staff to send

1. Text messages to a clients cell phone
2. Email from within the work order for the clients vehicle.

Features of this system are:

1. Pre-defined message lines, which can optionally be included
2. Setup “Keywords” in the message line(s) that the system will substitute for defined values such as:
  - a. Vehicle Info
  - b. Total Amount of Invoice
  - c. Order / Estimate Number
  - d. Store phone number
  - e. Balance due on the order
  - f. Customer number
  - g. Salesman
3. Save the customer’s default text message number and the customers default email address in the customer profile data.
4. Save a history of the messages sent which can be recalled, edited or resent on a per-invoice basis.

Setup options are stored in the Order Entry Code File (OE menu option 28) as

1. Comment Codes
2. Email Codes
3. Salesperson Codes

Usage in OE option 2:

1. “O” (order info) screen setup fields:
  - a. vehicle info
  - b. saleperson
  - c. e-mail address
  - d. cell phone number.
2. “M” (message) screen

**Usage: OE option 2 "O" screen**  
**Highlighting key fields used for messaging**

```

oemnu - /dsk0/010013
Order Info      Origin:- Job:j00502      Vehicle Info    S#:0007 52) Typ:
  Ord:   B04474   5) Loc...:BLM      30) Yr.:2004   34) Mil: 34,567
  2) Date:08/19/08 6) Dft/Sp:JMK  31) Mfg:CHEVY   51) Clr:BLU
  3) Stat:W-WORK in pro 7) Dft/Cp:JMK  32) Mod:ASTRO/PASSENGER VAN (RWD/AWD)
  4) P/O#:         8) Dft/Ip:---  33) Lic:PEPPER24 TX 40) Unt:.....

A/R Acct Info # 99-BLM A/H#99-BLM      Customer 35) Seq #:      AH#: 11124
  Retail Customer                                36) ROB'S LOC #6
                                                37) 1402 HUNTERS PLANE
                                                38)
  038                                           39) SAN ANTONIO, TX      78245

9) Trms: PAY ON RECEIP 10) F%:18.00%      Miscellaneous Info
  Days Due      % Due      Discount      41) Ship:           46) Inv Dt:
  11) 30        14) 100%    % 16) 0.00      42) TxCd: IB ILL/BLM 47) Inv #.:B04474
  12) 0         15) 0%     Dt 17)           43) Regi:           48) Contr#:
  13) 0         0%                               44) Refr: ARC       49) Sub#:
  Appointment & Contact Info                45) CrCk: N        50) Opt#:
  18) Dt:           19) Ti:
  20) C1: 217-555-5677 21) Ex:
  22) Hm: 217-555-9451 23) Ex:
  24) C1: 217-555-5367 25) Ex:      TxOK
  26) Email:yourcustomer@theiremailaddress Op# or I,A,P,C,Vx,T,H,OO,PP,X,E##,M:
                                                Press ENTER only, for more
  
```

Example above setup with the **TxOK** prompt by the third phone number  
 Field 26 sets up the **default email** to setup the **To:** field on e-mail messages  
 Field 6 the **salesperson ID** will setup the **From:** field on e-mail messages  
 Fields 30 - 32 define the **Vehicle Info** keywords (V\$) optionally inserted into messages

Any of the **phone** fields can be setup as Cell phones.

```

20) C1: 217-555-5677 21) Ex:
22) Hm: 217-555-9451 23) Ex:
24) C1: 2175555367 25) Ex:      TxOK
  
```

After the prompt for the phone **extension** field you are prompted for the phone **type**, only cell phones can be used for the text-messaging feature.

```

Enter phone TYPE
  P - business      H - home
  W - work          C - cell
  F - fax
  
```

If setup as a Cell phone you will be prompted if **Text Messaging** is allowed.  
 If **Y**, this will become the default **text message number** used.

```

20) C1: 217-555-5677 21) Ex:      Is it ok to send TEXT MSGS
22) Hm: 217-555-9451 23) Ex:      to this cell #? y
24) C1: 217-555-5367 25) Ex:      .....
  
```

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## OE option 2 “M” screen: Start screen

oemnu.run -		/dsk0/010013	
EMAIL/TEXT MESSAGE Contact			
Tmsg#: 217-555-1234		Last txmsg:	
Email: yourcustomer@theiremailaddress.		Last email:	
Enter option or screen option I,O,A,P,C,Vx,T,H,OO,PP,X,E##,M:			
NT - new text message		AA - all past activity	
NE - new email message		AT - past text msg activity	
		AE - past email activity	

Options are to start a new message or look at past message activity

**NT** Start a new TEXT message

**NE** Start a new EMAIL message

**AA** Look at all past message activity for this invoice

**AT** Look at all past TEXT message activity for this invoice

**AE** Look at all past EMAIL message activity for this invoice

Normal goto screen options **I,O,A,P,C,Vx,T,H,OO,PP,X,E**

## New Email Screen

EMAIL/TEXT MESSAGE Contact	
Tmsg#: 217-555-1234	Last txmsg:
Email: <a href="mailto:yourcustomer@theiremailaddress">yourcustomer@theiremailaddress</a>	Last email:
Create new EMAIL message	
1) To: <a href="mailto:yourcustomer@theiremailaddress.com">yourcustomer@theiremailaddress.com</a>	[Message header]
2) From: james@jmktdis.com	
3) Cc:	5) Include Work Inv: N
4) Subj: Status of W/O# B04474	
-----[Message Body]-----	
6) Hdr: Your 2004 CHEVY ASTRO is ready.	
7).....	
8).....	
9).....	
10).....	
11).....	
12) Trlr: Total balance due is \$0.00.	
Options: -enter text, with optional keywords OR + only - insert a line   -- only - delete line - only - clear this line	<u>Legend of Keywords</u> V\$ - veh info    D\$ - bal due T\$ - ttl amt    N\$ - cust nm O\$ - ord/est#   S\$ - salesman P\$ - loc ph#
Search defined comments: (Dbl lead f/full scr) =abc - search by Comment CODE \abc - search by Comment TEXT	

OE Code Comment E-MAIL TRAILER, if defined sets up the **Trlr**.

In this example the trailer includes the D\$ keyword

OE Code Comment E-MAIL HEADER, if defined sets up the **Hdr**.

In this example the header included the V\$ keyword.

OE Code Comment E-MAIL SUBJECT, if defined sets up the **Subj**.


In this example the subject included the O\$ keyword.

OE "SM" Code from the O screen line 6 stores the email address used in the **From**: field

O screen field 26, if defined, sets up the **TO**: field

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With the cursor on one of the available lines (lines 7 thru 11) the following options are available

- + inserts a blank line
- clears line
- deletes the line
- =abc - search by **Comment CODE** and insert on line  
looks up by the code name as defined in OE option 28
- \abc - search by **Comment TEXT** and insert on line  
looks in text portion of e-mail codes for matching text string.
-  Either search option will display a full screen when entered twice  
i.e. == or \\ as lead off characters

After entering your message the following help options appear on the screen:

Enter option or screen option :

# - edit line#	H - exclude header message
S - send message	T - exclude trailer message
F - save msg w/o sending	X - exit w/o saving msg

- H optionally exclude the pre-defined **header** message line and substitute your own message line.
- T optionally exclude the pre-defined **trailer** message line and substitute your own message line.
- X **exit** message screen without sending/saving a message
- # select a **line** to edit/change
- S **Send** the message
- F **Finish** the message without sending

## New Text Message Screen

EMAIL/TEXT MESSAGE Contact	
Tmsg#: 217-555-1234	Last txmsg:
Email: yourcustomer@theiremailaddress..	Last email:
Create new TEXT message	
1) To: 2175551234	----- [Message Body] -----
2) Hdr: From: JMK Tire Co.	
3) .....: .....	
4) .....: .....	
5) Trlr: Have a nice day	
Options: -enter text, with optional keywords OR + only - insert a line   -- only - delete line - only - clear this line	<u>Legend of Keywords</u> V\$ - veh info    D\$ - bal due T\$ - ttl amt    N\$ - cust nm O\$ - ord/est#   S\$ - salesman P\$ - loc ph#
Search defined comments: (Dbl lead f/full scr) =abc - search by Comment CODE \abc - search by Comment TEXT	

OE Code Comment TXTMSG TRAILER, if defined sets up the **Trlr** line 5

OE Code Comment TXTMSG HEADER, if defined sets up the **Hdr** line 2

O screen fields 20 – 24 (Phone), if defined for TxOK sets up the **To** field (field 1) which is the cell phone number the text message will be sent to.

O screen field 26, if defined, sets up the email field (informational only for text msg)

Lines 3 & 4 are for the text message.



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With the cursor on one of the available lines (lines 3 thru 4) the following options are available

- + inserts a blank line
  - clears line
  - deletes the line
  - =abc - search by **Comment CODE** and insert on line  
looks up by the code name as defined in OE option 28
  - \abc - search by **Comment TEXT** and insert on line  
looks in text portion of e-mail codes for matching text string.
- ☞ Either search option will display a full screen when entered twice  
i.e. == or \\ as lead off characters

After entering your message the following help options appear on the screen:

☞ The “**Chars left**” field, displays the number of characters available

Enter option or screen option : Chars left: 107

# - edit line#	H - exclude header message
S - send message	T - exclude trailer message
F - save msg w/o sending	X - exit w/o saving msg

- H optionally exclude the pre-defined **header** message line and substitute your own message line.
- T optionally exclude the pre-defined **trailer** message line and substitute your own message line.
- X **exit** message screen without sending/saving a message
- # select a **line** to edit/change
- S **Send** the message
- F **Finish** the message without sending

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## OE Code screens

**CM: Defines either TEXT or E-MAIL text that optionally may be included.**

```
Code Type.....: CM -Comment                      90) Location.:  
1) COMMENT code.: E-MAILREADY  
2) #1.: YOUR /V$/ IS READY  
3) #2.:  
4) #3.:
```

Option:

```
Press ENTER only, when all data is correct  
Enter XX to DISREGARD changes and return to the menu screen
```

All email codes must start with the text E-MAIL

All text message code must start with the text TXMSG

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Special Purpose e-mail codes:

E-MAIL HEADER  
E-MAIL TRAILER  
E-MAIL SUBJECT  
E-MAIL CC  
E-MAIL BCC



Code Type

Code Name

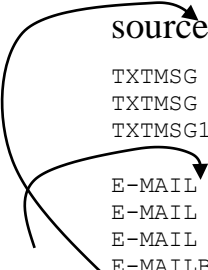
Special Purpose text message codes

TXTMSG HEADER  
TXTMSG TRAILER

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Sample portion of OE option 76 report, showing comment codes.

Note codes with keywords embedded to insert data from other sources.



```

TXTMSG HEADER   From: JMK Tire Co.
TXTMSG TRAILER  Have a nice day
TXTMSG1         Your V$ is ready. Total balance due is D$.

E-MAIL HEADER   Your V$ is ready.
E-MAIL SUBJECT  Status of O$
E-MAIL TRAILER  Total balance due is D$.
E-MAILBALANCE  Total for repairs is t$, with balance due of d$

```



**Only** the “Special Purpose” codes have a space between the code **type** and code **name**

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**EM Code: Defines the email service and access parameters. This code is normally setup by JMK staff during initial system setup and need not be changed.**

Code Type.....: EM -Email Accounts 90) Location.: BLM

- 1) Account Name.....: DEFAULT
- 2) Email Address.....: jmktdis@ourmail.net
- 3) Reply-To Address.....:
- 4) Outgoing Server(smtp): smtp.ourmail.net  
Port.....: 555
- 5) Use Authentication...: Y  
Username.....: [ourpasswd@ourmail.net](mailto:ourpasswd@ourmail.net)  
Password.....: ourpasswd
- 6) Use Secure Connection: Y  
Verify Certificate.: Y

Option:

Press ENTER only, when all data is correct  
Enter XX to DISREGARD changes and return to the menu screen

**SM Code Defines the From: email address**

Code Type.....: SM -Salesman code 90) Location.:

- 1) Salesman code.: JMK
- 2) Salesman Name.: James Krakower.....
- 3) Sales Quota....: .....
- 4) Email address.: james@jmktdis.com

Option:

Press ENTER only, when all data is correct  
Enter XX to DISREGARD changes and return to the menu screen