

ACOWIN PAGING AND E-MAIL

Setup and User's Guide

1. Introduction

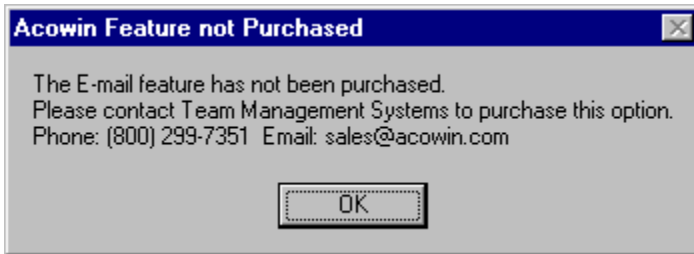
The Acowin Paging and E-Mail option allows your Acowin system to send both service calls, and free-form messages, to your technicians. The paging software uses a modem to dial directly to the paging company's modem. The e-mail software uses ordinary e-mail protocols to send messages to the technician over the Internet, using the same provider and account information that you use when you send e-mail with a program like Outlook Express.

If you are going to send messages through an alphanumeric pager, you will need a modem in one of your Acowin computers – any computer running Acowin will do, so the modem doesn't have to be connected directly to the Acowin server. Your paging company must provide you with a phone number for your modem to dial, so it can connect to the paging company's modem. You will also need to know the maximum message size for your pagers. 80, 120, and 250 characters are common message sizes.

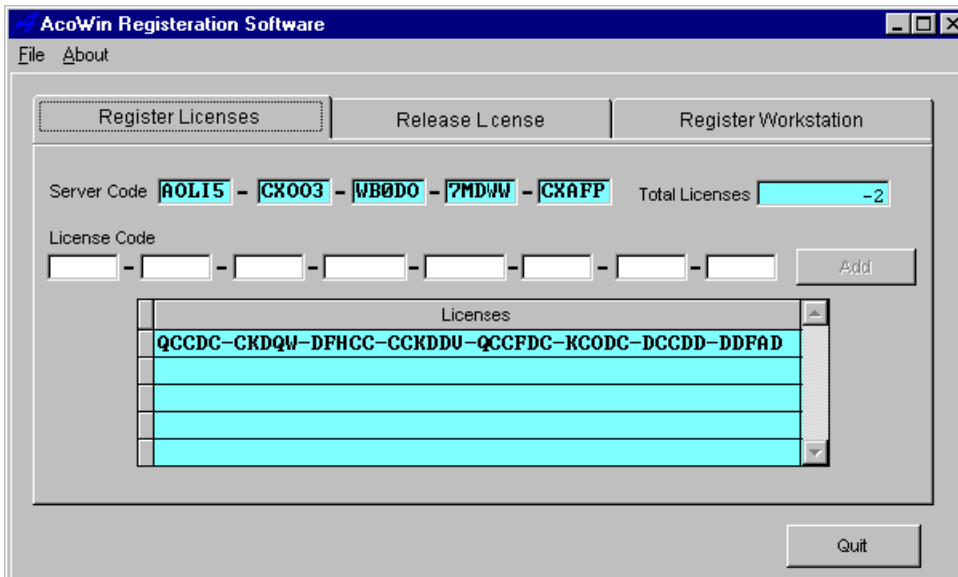
If you are going to e-mail your messages, your Acowin server must be connected to the Internet. A dial-up connection could be used, but it would be much better to have an always-on broadband connection, such as a cable modem, DSL, or T1. You must have an e-mail account name and password that the Acowin software can use to send outgoing mail. This account must be able to handle SMTP (Simple Mail Transfer Protocol) e-mail. You'll need to know the SMTP server name, meaning the name of the computer that handles the outgoing mail. If you have a normal e-mail program, such as Outlook Express or Netscape Communicator, you should be able to get the SMTP server name by looking at its settings. Instructions for how to check the e-mail settings in Outlook Express, with screen shots, are provided later in this User Guide.

2. Entering Your Paging and E-Mail License Code

When you purchase the paging/e-mail option, Team Management Systems will send you a license code. This code must be entered before you can send any pages or e-mail messages. If you don't enter the code, you'll see this message when you attempt to send pages or e-mail:



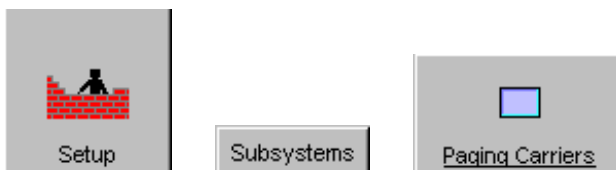
To enter your license code, go to the Acowin server. Click on the Windows Start button, then choose Programs / Acowin / Acowin Tools / Acowin Register. The main screen of the Registration program is where you will enter the license code.



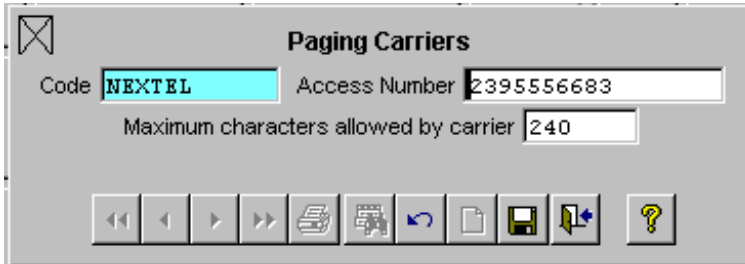
Type in your paging/e-mail license code, then click the Add button. If the Add button doesn't light up, then you made an error when you typed in the code. After you've added the new license code, click the Quit button to exit from the Registration program.


3. Setting Up The Paging Carrier *(skip to step 4 if using e-mail only)*

If you plan to use the paging software, you'll need to set up your paging carrier. If you deal with more than one paging company, you can make more than one entry in the paging carrier file. You don't need to set up any paging carriers if you're only using e-mail. The Carrier File is located in Setup, on the Subsystems menu:



The Carrier File automatically comes up in “new record” mode, ready for you to type in your carrier’s name, phone number, and maximum message size. Contact the paging company and ask them for the phone number of their modem, and max message size, if you don’t already have that information.



 Click the Save button after you’re finished entering the carrier information.


 If you need to set up additional Carriers, click the New button.

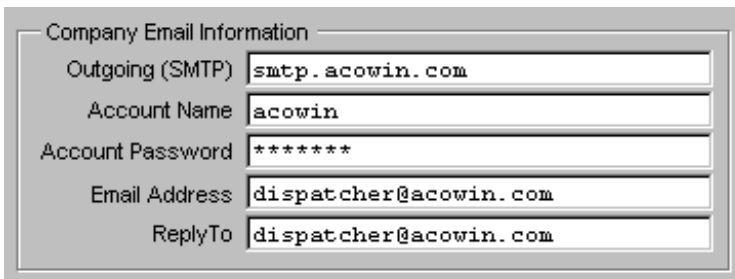
 When you’re finished entering Carriers, click the Exit button.

4. Entering Your E-Mail Information

If you’re going to use the E-Mail software, you need to enter your e-mail account information in Setup, on the Internet screen.



 Once you’re looking at the Internet screen, click the Edit button. Fill in all of the information about your e-mail account, then click the Save button. The Internet screen is pictured below, followed by a description of what each field means.



Outgoing (SMTP) is the name of the e-mail server that handles outgoing messages. This server must be able to handle the SMTP (Simple Mail Transfer Protocol) e-mail format. The great majority of e-mail servers can accept SMTP messages, but a few of them cannot – Microsoft’s Hotmail is an example of a mail service that will not accept an SMTP message. The names of these servers usually begin with “smtp”, as in the example above.

Account Name is the user name of the e-mail account that Acowin will use to send outgoing messages. Acowin will log into the SMTP server using this name. You could set up a special account exclusively for Acowin to use, or you could use one of your existing e-mail account names.

Password is the password that goes with the e-mail account name you have entered. It appears as a row of asterisks when you type it.

Email Address is the originating address that will appear on messages sent through Acowin. It doesn’t necessarily have to be the same as the Account Name, as shown in the example above – the account name is “acowin” but the actual originating e-mail address is dispatcher@acowin.com. When a technician receives an e-mail from Acowin, this is the address that will appear on the “From” line.

Reply To is the e-mail address that will receive any replies sent to Acowin e-mail messages. This does *not* have to be the same as the originating E-mail Address. In the above example, both addresses are the same, but it could also have been configured to send replies to replies@acowin.com or administrator@acowin.com. It’s up to you to decide if you want the replies to go to a special mailbox.

5. How to Check Your E-mail Settings In Outlook Express

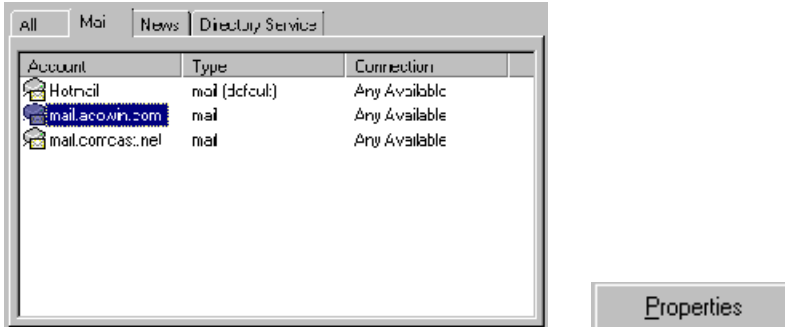
If you already have e-mail accounts set up on one or more of your office computers, you could check their settings to obtain the information required on the Internet screen. (The only thing you won’t be able to see this way is the password – it will just appear as a row of asterisks, the same as it looks on the Internet screen of Acowin.) Following are instructions for looking at your account settings in Microsoft Outlook Express, which is one of the most commonly-used e-mail systems. If you use different software, there should be some similar method of pulling up the account information.

A. Run Outlook Express, and pull down the Tools menu.

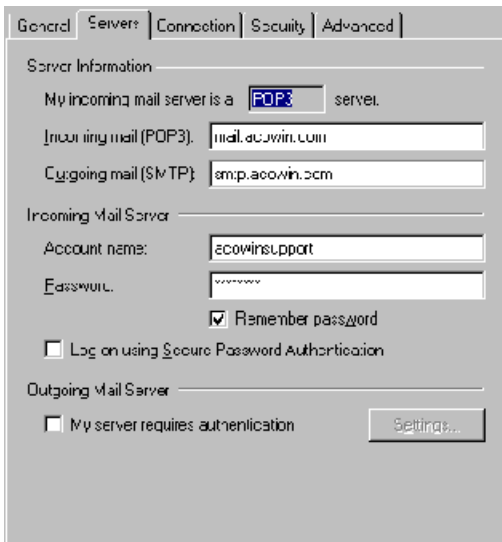
B. Choose Accounts.



C. Select your e-mail account from the list that appears, then click Properties.



D. Click the Servers tab at the top of the Properties window. The Servers screen shows you the name of the outgoing (SMTP) server, and your account name.



E. Once you've copied down the information you need, click the Cancel button to close the Properties window. This will return you to the window that lists all your e-mail accounts. Click the Close button to close this window.

6. Selecting Your Call Slip Paging Fields

You can use both paging and e-mail to send Call Slips to your technicians, right from the Dispatch Board. Acowin allows you to choose which information from

the Call Slips will go to the technicians, and the order in which the fields will be received. This is especially important for alpha pagers, which have a limited amount of space for incoming messages – you should try to keep the total length of your Call Slip transmissions less than the maximum message size of the pager. If you don't, you might get your Call Slips broken into several separate pager messages, which could be undesirable if your paging company charges you based on the number of transmissions you send each month. You might also see parts of the Call Slips dropped or truncated if you exceed the max message size of the pagers. Overall message size is usually less of a consideration when you're using e-mail, but you should still try to keep the Call Slip transmissions short and sweet, especially if your techs are reading the e-mails on the tiny message window of a cell phone.

To configure your Call Slips, click Setup, then choose Settings, and click on the Paging Fields button. **Note** that although this button is labeled "Paging Fields", the format **applies to e-mailed Call Slips as well**. Even if you're *only* using e-mail, you should still set up the Paging Fields screen, to control the way your Call Slips are sent as e-mail.



On the Paging Fields screen, place a check mark next to each Call Slip field that you would like to send as part of your pager or e-mail transmissions. Use the Order field to determine which order the fields will appear – for example, if you want the first field that appears in the pager messages to be the Call Slip number, type "1" in the Order column for "Callslip #." The maximum length of each field is displayed, and totaled at the bottom of the screen. If you're using pagers, try to keep this total length less than the max message size of your pagers. Note that some of the fields are of "variable" size, meaning there's no way to tell exactly how large they will be. If you include any variable fields in your message design, the system will print as much of them as it can, and truncate them when it runs out of space. The variable fields are clearly marked on the setup screen.

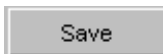
Paging Fields Setup

Last Modified by: Last Modified Date:
 Last Modified Time:

Chk	Order	Description	Max Length	Type
<input checked="" type="checkbox"/>	1	CallSlip #	10	Fixed
<input type="checkbox"/>	0	Site #	10	Fixed
<input checked="" type="checkbox"/>	2	Site DisplayName	35	Fixed
<input checked="" type="checkbox"/>	3	Site Address1	35	Fixed
<input checked="" type="checkbox"/>	4	Site Address2	35	Fixed
<input checked="" type="checkbox"/>	5	Site City/State/Zip	28	Fixed
<input checked="" type="checkbox"/>	6	Phone #	12	Fixed
<input type="checkbox"/>	0	Contact	35	Fixed
<input type="checkbox"/>	0	Billing Customer #	5	Fixed
<input type="checkbox"/>	0	Billing Customer Name	45	Fixed

Maximum Characters Used: (Fixed Length Only)

In this example, the Call Slip information sent to the pagers will include Call Slip Number, Site Display Name (generally last name, first name for residential customers, full company name for commercial), both address lines, city-state-zip, and phone number. The Order column has been set to put Call Slip number first, then name, address, etc. The total length of the Call Slip pager transmissions will not exceed 160 characters.



When you've arranged the Call Slip fields to your liking, click the Save button. You can always come back and change the Paging Fields at any time, if you change your mind about which fields you'd like to include.

7. Entering Paging and E-mail Information For Your Employees

Next, you'll need to enter each technician's paging or e-mail information in the Employee File. It's possible for a single employee to have both an alphanumeric pager and e-mail capability, so you can enter both paging and e-mail specifications for the same employee. The Employee File is accessed from the Acowin Main Menu.



This is the Employee File's menu button.



Use the Search button to locate the employee you want to set up first, or use the VCR buttons (the blue arrows) to scroll through all of your employees.



Once you find the employee you want to set up, click the Edit button.

The paging and e-mail fields can be found at the bottom of the Employee File screen. If the employee has an alphanumeric pager, use the Paging Carrier pull-down menu to select the proper carrier, then enter the pager's ID number. For most paging companies, this is the ten-digit phone number of the pager. You may wish to contact your paging company to verify this. If the employee can receive e-mail, enter their full address in the Email field. The example pictured below shows an employee who has both paging and e-mail set up.

Paging Carrier	NEXTEL	Email	waynefair@worldnet.att.net
Paging Number	2395551212	WebService PW	

Note: Nextel phones that include e-mail capability typically use the phone number as their e-mail address, with *messaging.nextel.com* as the domain. If the employee pictured above had a Nextel phone that could receive e-mail, his address would probably be 2395551212@messaging.nextel.com.

Note: It's very important that you enter an e-mail address for the Employees who will be *sending* e-mail, as well as those who will receive the messages. This is because the e-mail address from the sender's Employee File becomes the "From" address on the e-mail message. Since most e-mail providers will reject messages with blank "From" addresses, Acowin was designed to require sending users to have e-mail addresses in the Employee File. If you try to send a message with e-mail, and the e-mail address in your Employee File is blank, you will see an error message reminding you that you must provide an e-mail address in the Employee File.



After you've entered the paging or e-mail information, click the Save button to save your work. You can then continue on to the next employee, or click the Exit button when you're finished working with the Employee File.

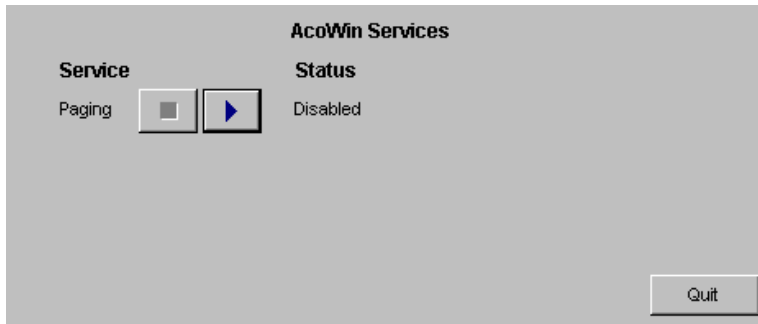
8. Running Alpha Page

Acowin uses a program called Alpha Page to handle communication with your paging company. This program exists on every Acowin computer – the server and all workstations. You can run it on **any one** of your Acowin computers. In other words, if you've got the Acowin server and three workstations, you could run Alpha Page on the server or any of the workstations – whichever computer has a modem and a phone line connected. You only need to run Alpha Page on **one** of your computers, but it can be any one of them.

To run Alpha Page, click your Windows Start button, then choose Programs – Acowin – Acowin Tools – Acowin Paging. You might want to make a desktop

shortcut for it, by *right-clicking* on the AcoWin Paging option and choosing “Send To Desktop.”

The Alpha Page program is very simple. It has a stop and play button, just like a video-tape recorder or CD player. To activate the paging services, click the play button. To stop paging services, click the stop button. The screen tells you if the paging services are running or not. In the example below, paging has not been started yet – you would click on the play button to start it.



The Alpha Page program should be left running and enabled on the computer you’ve chosen to host it, until the end of your work day. At the end of the day, you should stop the paging service, then click the Quit button to exit from Alpha Page. (This is important because if you leave Alpha Page running overnight, it might interfere with your backup software.) You do **not** have to run Alpha Page if you’re not sending alphanumeric pages. The e-mail system doesn’t use Alpha Page and doesn’t need it to be running.

9. Sending Call Slips As Pager Messages Or E-Mail

To send a Call Slip as a pager message or e-mail from the Dispatch Board, *right-click* on the call to open its Dispatch Detail window. This window is pictured below. The button that looks like a piece of mail sends the Call Slip as e-mail, while the button that looks like a letter “P” sends it as a pager message. In both cases, the call will be sent to whichever technician it is scheduled for.

Dispatch Record Detail

Call Slip Number: 1025 Site Number: 01009-0001 Reschedule Call:

Site Name: Roper, Keith Zone: North Credit Status:

Site Address 1: 5703 Fox Lake Dr Priority: DEFLT Dispatched Status: Open

Site Address 2: Tech: JEFF Rescheduled Status: 1

City, ST, Zip: North Ft. Myers, FL 33917 Type: Tech 1 Paged Status:

Site Phone 1: (239) 772-3491 Tech Status, Dept: DEF Call Taken: 05/16/2003

Site Phone 2: Est. Time: hh:mm

Contact: Keith Roper

Scheduled: 07/16/2003 Description: *** SBW-Sewer Backed Up ***

Range: / /

Dispatched: 07/16/2003

Arrived: 07/16/2003

Departed: 07/16/2003

Problem Codes	Code	Est Time
	SEW	03:00

Contract List

Map



This button sends the Call Slip as an e-mail message.



This button sends the Call Slip as a pager message.

10. Sending Free-Form Messages To Pagers or E-Mail

At the top of each technician's column on the Dispatch Board is a row of four little buttons. The fourth button looks like a piece of mail. Clicking on this button allows you to send free-form messages via pagers or e-mail.



The fourth button is the message button.

When you click the message button, a new window will appear. The technician whose column you have clicked on will be checked off to receive the message. Every other tech who has the same communication options will be listed as well, and can be checked off to receive the message, if you desire. In the example

below, the technician we initially chose to receive the message is Bob. Bob has a pager, but no e-mail – you can tell because he has pager information filled in (his carrier is Skytel) but no e-mail information. Technicians Mike and Wayne also have pagers, so they are listed as possible message recipients as well.



Click this button to send your message as e-mail.



Click this button to send your message as an alpha page.

Note that if your selected technician has both paging and e-mail capability, you can use either method to send your message, according to your preferences.

11. Sending A Printed Call Slip Form As E-Mail

If you have the ability to send e-mail to a technician, you can send the full printed Call Slip to them, as an Adobe Acrobat file, also known as a PDF file. The technician would have to receive the message on a device that can open a PDF file – a simple monochrome cell phone probably won't be able to do it, but more advanced phones, personal data assistants, and portable or desktop computers should have no problem with it. If one of your computers doesn't have the Adobe Acrobat Reader, it can be downloaded for free from www.adobe.com.

To send a full printed Call Slip, you must first access the Call Slip file. You can do this from the Dispatch Board by using Control + *right-click* to see the Jump menu, then choosing Call Slip. Otherwise, you can click the Call Slip button on the Main Menu, then use the Search feature to locate the Call Slip you wish to e-mail.



Once you have the Call Slip on your screen, click the Print button on the Toolbar. A menu of printing options will appear. Choose Call Slip, then click Print. (It's best to leave the History and Equipment options un-checked, and send just the Call Slip itself.)

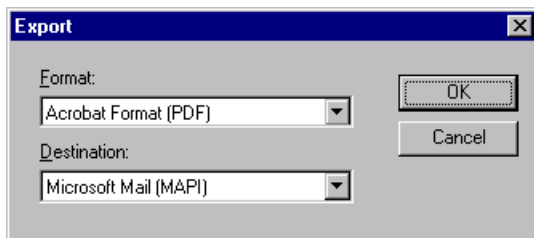
The image shows a 'Print Options' dialog box with the following elements:

- CallSlip
- CallSlip Invoice
- History Options**
 - Show History
 - All
 - Last 3
 - Show Notes
 - Equipment
 - All
 - Selected
- Equipment Options**
 - Equipment
 - All
 - Selected
- Enter Invoice Date:
- ** Enter Invoice Number S-
- Print
- Preview
- Buttons: Cancel, Print
- Footnote: ** (leave blank for computer generated)

The Call Slip will now appear on your screen as a preview.



In the upper-right corner of the preview screen is a button that looks like an envelope. Click on this button. A dialog window will appear, asking you what format you would like to use – it defaults to Adobe Acrobat (PDF). It also asks for a destination. Your destination choices include Disk File and Microsoft Mail (MAPI). If you select Disk File, the standard Windows explorer will appear, so you can select a folder on your hard disk to hold the Call Slip PDF file. If you select Microsoft Mail, the PDF file will be immediately sent as e-mail – your default e-mail program (such as Outlook Express) will automatically run and create a new message, with the PDF file attached.



Sending the Call Slip file as a PDF can be useful if you want the technicians to produce a printed copy of the Call Slip, perhaps to use as a work order, or to give to the customer. Even a tech using a portable computer or PDA could be equipped with a portable ink jet printer, to produce printed Call Slips in the field.