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How to Set Up and Send an E-mail

SUMMARY

The E-mail feature allows the user to automatically e-mail from the program reservation trip sheets, invoices, statements, confirmation letters and all reports for any customer on file. Send an e-mail to your Accounts, Bill To, Administrators, Agencies, Landmarks and Drivers*. A field is also available for entering an e-mail address that is not on file. The user can continue with data entry while e-mails are being transmitted. For the most speed, utilizing a broadband Internet connection is recommended. The E-mail feature integrates with Microsoft Outlook or Outlook Express.

*Note: The e-mail feature will only send e-mail to the driver's computer where their e-mail mailbox resides. It will not send the e-mail to their phone or pager.

E-MAIL REQUIREMENTS

The E-mail feature is automatically configured for Windows 98 SE, NT 4.0, 2000 and XP Professional (with all the critical and security updates and service packs) Microsoft Outlook or Outlook Express. If Microsoft Outlook or Outlook Express is available on this computer, but it is not configured in Windows, we recommend that a knowledgeable Network Administrator complete the set up. If you are using Microsoft Outlook, it must be open in order to send e-mails from LMS Gold for Windows.

HOW TO SET UP E-MAIL DEFAULTS

The user can select a **Subject** line and a message for the **Body** of the e-mail for the Trip Sheet, Invoice, Statements and Manifest. When sending an e-mail the Trip Sheet, Invoice, Statements and Manifest become an attachment.

1. On the upper menu click on **Systems** then click on **E-mail Defaults**. A window will appear to edit or view the e-mail defaults.
2. Select Trip Sheet, Invoice, Statement or Manifest for viewing or editing. The subject line and the body text will appear for the document selected.
3. Click on the **Subject** line or the **Body** window. If the user would like to edit the subject line and/or the body text, click on **Legend** found at the bottom left hand corner. A legend will appear with all the different selection available for the subject line and/or the body text of the e-mail. Click on the selection then click on **Select** at the bottom.

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HOW TO SEND AN E-MAIL

The user can e-mail reservation trip sheets, invoices, statements, confirmation letters and all reports for any one customer file.

1. Select the document to be e-mailed and bring in onto the screen.
2. Click on **Print** then click on **E-mail**.
3. Select **Account**, **Bill To**, **Administrator**, **Driver**, **Agency**, or **Landmark**. If an e-mail address is on file, it will automatically appear in the box.
 - a. Once a recipient is selected the user may also tag the **Show Browse** box. This will allow the user to view all the records for that selection. For example: If **Driver** is selected, the e-mail address for the driver assigned to the reservation will automatically appear. If the user would like to send the e-mail to a different driver, tag the **Show Browse** box and a browse screen with all the drivers will appear and the user can click on the alternate driver that is to receive the e-mail and then click on **Select**.
 - b. If more than one e-mail address is available a browse screen will appear. The user can click on the person or business and then click on **Select**.
 - c. If an e-mail address is not available on file the user may type in the address.
4. Click on **Proceed**. Select to send **All Pages** or a **Page Range**.
5. Click on **OK**.

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