



SETUP E-MAIL TRANSMISSION

VAST Enterprise

The material in this document is applicable for ALL VAST Enterprise Retail versions and for ALL VAST Enterprise Multi-Store versions.

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E-Mail Transmission in VAST

This document provides instructions on how to setup the Estimate/Invoice **E-Mail** and or **Fax** Transmission functionality within VAST. This will enable you to E-mail or Fax estimates, invoices and reprinted invoices to your customers.

A. VAST Maintenance

1. To begin open **VAST MAINTENANCE** and go to the **CONTROL FILE**.
2. Click on the **MISC** tab. You will need to put a checkmark in the **“Using Fax/Email”** checkbox, as shown below.

Control File

General Ledger Outside Purchase

Fees/Road Hazard Warranties Purchases Accounts Receivable

General Point of Sale System Parameters

Wholesale Options Claim Interface

Additional Parts/Catalogs Average Cost

Operating System Reporting **Misc**

Charge Program Path: _____

Using External System Pricing External Pricing URL: _____

Using Internet for Meteor Transmissions

Using Internet for Midaslink

Force Negative Inv. Comments

Using Fax/Email

Automatic Receiving Days

Commit only for x days:

Commit Inventory Estimate/T-Out:

Also Commit Phone Quotes Phone Quote:

Also Commit Appointments after Appt Date:

(0 days = will stay committed until Purge)

Allow Manual Uncommit

Using XML Force Discount Reason

Summarize by package/tag along part

Employee Password

Allow Negative Transfers

Phys Inven Wkshst setup done at Office

Phys Inven allow concurrent invoicing

Phys Inven allow concurrent OutsPurch

Remove Action From Auto Estimating Part

Using Price Overrides

Using Replication

Company 0001

3. Then click **DONE** to return to the main menu.
4. From the **VAST MAINTENANCE** main menu, click on the **COMPANY** icon.

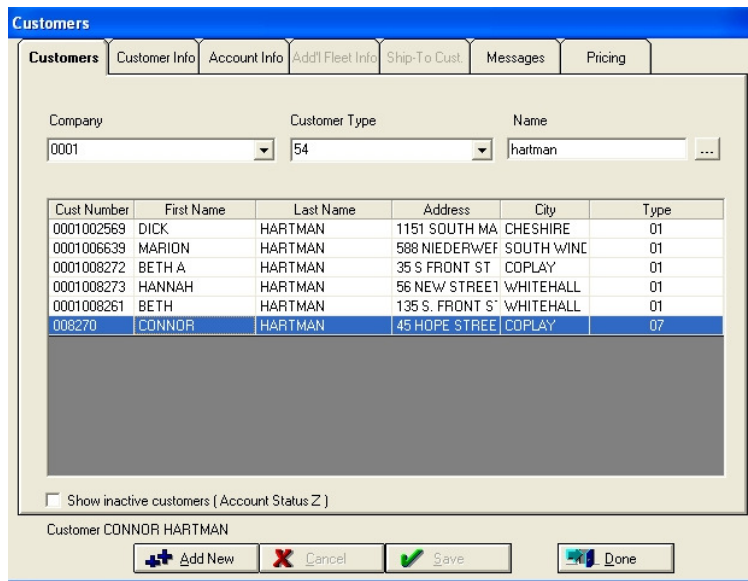
5. Select your shop and then click on the **COMPANY LIST DETAILS** tab. You will see a screen similar to the one shown on the following page.

The screenshot shows a software interface for editing company details. The 'Company List Details' tab is active. The form includes the following fields and values:

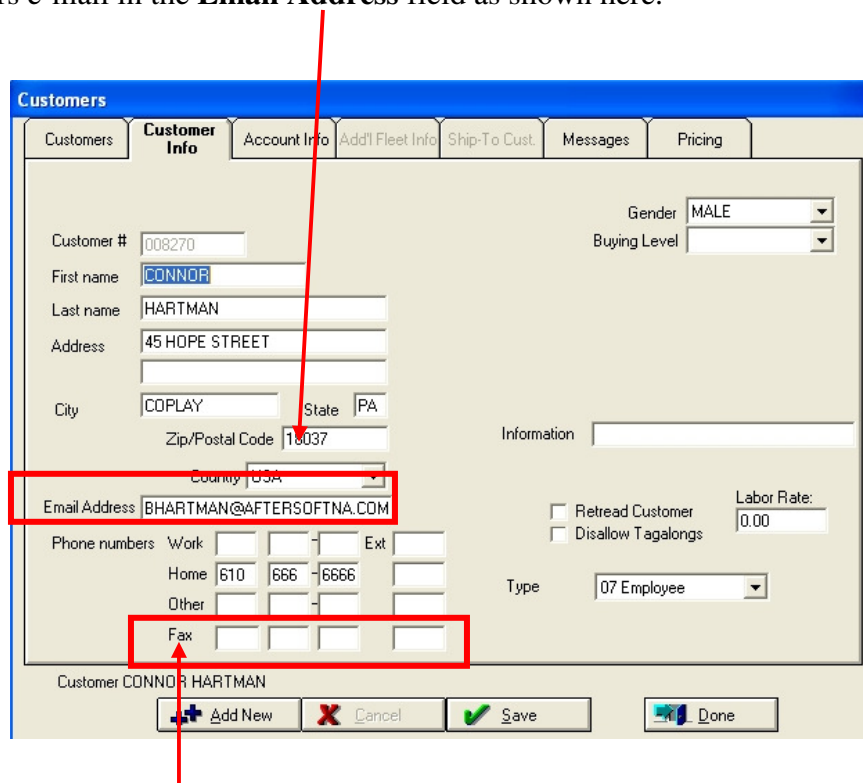
- Company #: 0001, Alias: Allentown
- Name: AFS TIRE & AUTO SERVICE
- Address: 3435 Winchester Road
- City: ALLENTOWN
- State: PA, Zip/Postal Code: 18104
- Phone #: 610 336 9045
- Tax #: (empty)
- Non Sig #: 174026
- Michelin Dealer ID #: (empty)
- Michelin Store ID #: (empty)
- OpenWebs Seller ID: (empty)
- O'W - Same/Next Day Quantities:
- Run EOD:
- E-Mail Address: bhartman@aftersoftna.com (highlighted in red)
- Outgoing Mail (SMTP Server): altcptexch-01 (highlighted in red)
- E-Mail Authentication Required:
- E-Mail Login: (empty)
- E-Mail Password: (empty)
- Administrator E-Mail: (empty)
- Security Code, Shop: *
- Security Code, Maint: *
- Security Code, Multi-Store: *
- Area: 2
- District: 2
- Store Type: (empty)

Buttons at the bottom: Delete, Cancel, Save, Done.

6. On this screen, you will need to fill out the **“E-Mail Address”** field with your shop’s email address.
7. You also need to fill out the **“Outgoing Mail (SMTP Server)”** field with the name of your outgoing mail server.
8. If your email provider requires authentication, you will need to put a checkmark in the **“Email Authentication Required”** checkbox. Then enter your email login and passwords on the corresponding fields below.
9. When you are finished entering the information, click **SAVE** and **DONE** to return to the Maintenance main menu.
10. Next, go to the **CUSTOMERS** icon.
11. Enter the **Name** of the Customer then click on the ellipsis button **...**.

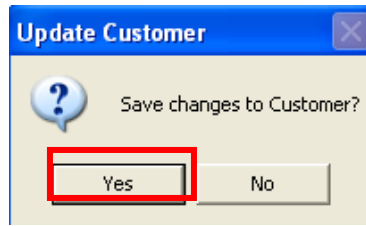


12. Select your customer by highlighting the customer, and then click on the **Customer Info** tab. Enter the customers e-mail in the **Email Address** field as shown here.



13. Or enter the customers fax number.

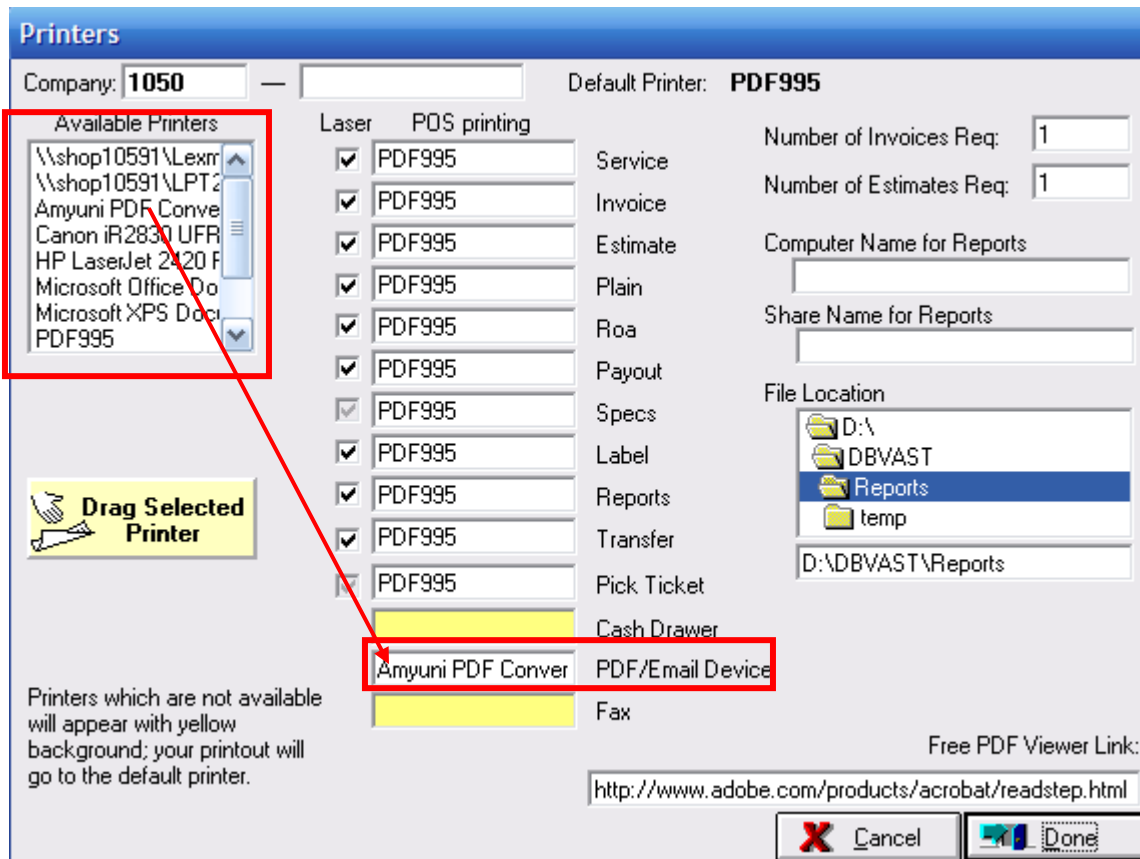
14. Click on **Save**. You will receive the following message. Click **Yes** to save the changes that were just made.



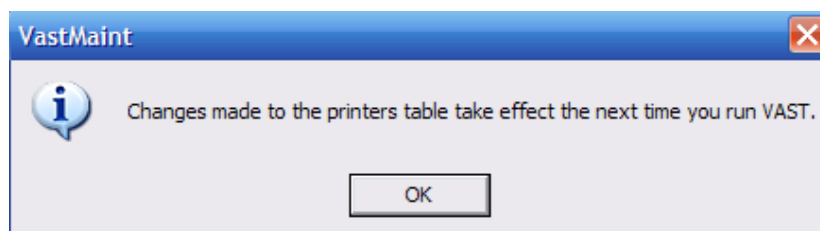
15. This will take you back to the Customer screen. Click **Done** which will take you back to the Maintenance Main Menu.

16. Next, go to **Printers** icon.

17. From the Available Printers window click and drag the *Amyuni PDF Converter* to the PDF/Email Device field.



18. Click on **Done**. You will receive the following message. Click **OK** to save the changes that were made



19. You will be taken back to the Maintenance Main Menu.

B. VAST Point Of Sale

1. To begin open VAST Point of Sale. Click on one of the following **Customer Contact**, **Employee Sale** or **Corporate Fleet/NA** and enter your search criteria for your customer. Then enter the vehicle information. Click **Next**.

The screenshot displays the 'Customer/Auto HARTMAN 2005 CHEVROLET' window. It is divided into two main sections: 'Employee' and 'Auto'.

Employee Section:

- Last Name:** HARTMAN
- First Name:** CONNOR
- Gender:** MALE
- Address:** 45 HOPE STREET
- City:** COPLAY
- State:** PA
- Zip/Postal Code:** 18037
- Home Phone:** 610 666 6666
- Work Phone:** (Empty)
- E-Mail Address:** BHARTMAN@AFTERSOFTN.
- Taxable Customer
- Leasing Company

Auto Section:

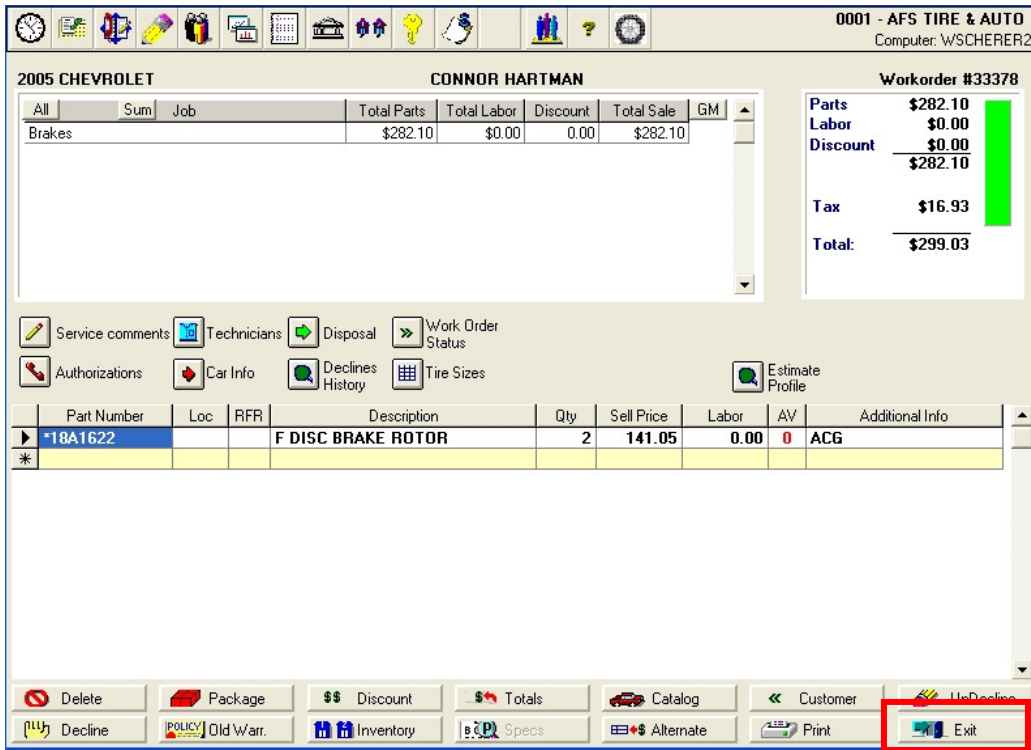
- Year:** 2005
- Make:** CHEVROLET
- Model:** COLORADO SPORT
- Engine:** L4-2770cc-169ci 2.8L FI
- Mileage In:** 454564
- Vehicle Type:** AUTO
- License:** MINE03
- State:** PA
- Color:** BLACK
- VIN Number:** 561465765415454

Additional Options:

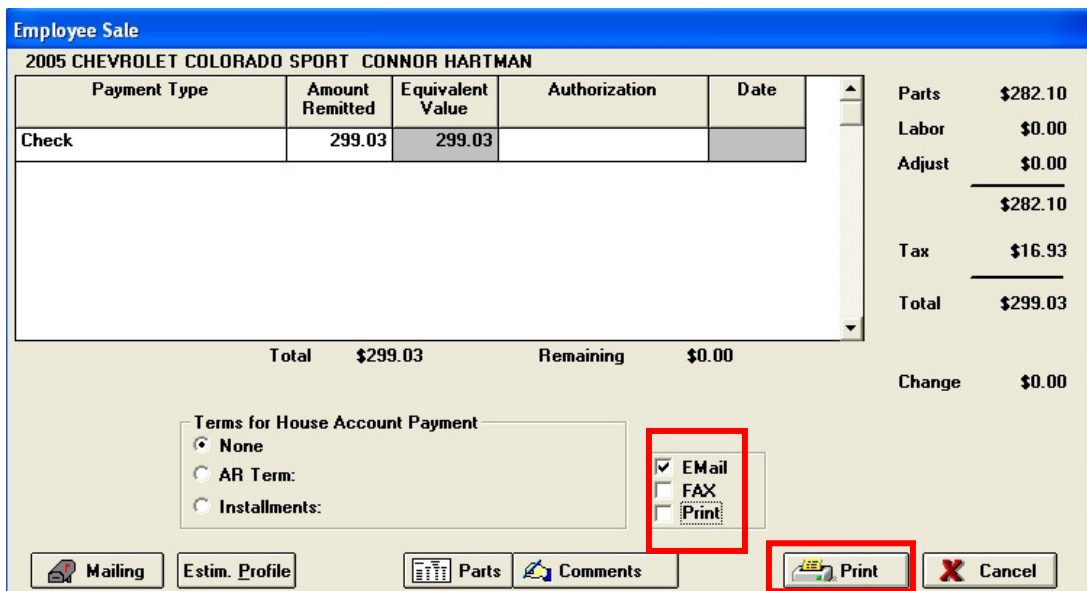
- Reasons / Inspection Forms
- Service Comments
- Salesperson (TPMS)
- Manager
- Estimator
- Buying Level

Navigation: History, Info, Vehicle Profile, Customer Profile, Back, Next

2. On the **Workorder/Estimate** screen enter the part number(s) in the line item field. When you are finished, click on **Exit**.



3. If necessary complete the **Workorder Screen Check-out**. Then on the **Workorder Exit Options** screen click on **'Create an Invoice'**.
4. This will bring up the **Invoice Print** screen. Here you can choose between **Email, FAX, and Print** by placing a checkmark in the checkboxes. You may choose more than one method of printing the Invoice. If the customer wants copies of the Invoice sent to their e-mail as well as receiving a paper copy, then select both the **Email** and **Print** options. Click the **Print** button.



5. Next, the **Estimate/Invoice Email or Fax** screen appears. Verify the **Customer Email Address** or the **Customer Fax Number** then click the **Submit** button.

Estimate/Invoice Email or Fax

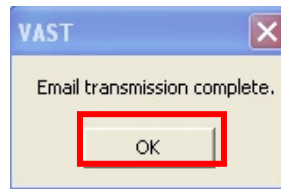
EMail Customer Email Address:

Fax Customer Fax Number: Ext.

Note for emailing: If your Internet service requires email authentication then please be sure that in Company Maintenance you have checked 'email authentication required' and you have entered your email login and password.

EMPLOYEE
EMPLOYEE Number: 33378
Name: CONNOR HARTMAN
Date: 6/19/2009
Amount: 299.03

- You will see the **Email Transmission Complete** message box. Click **OK** to continue posting the invoice.



- At this point the invoice has been e-mailed to the customer. To see what the Invoice will look like, please see the screen shot below.

AFS TIRE & AUTO SERVICE
3435 Winchester Road
ALLENTOWN, PA 18104
(610)336-9045

PAGE 1

Customer ID: 008270	Year: 05	Date/Time: 06/19/09 08:30:00
Name: CONNOR HARTMAN	Make: CHEVROLET	Workorder #: 33378
Address: 45 HOPE STREET	Model: COLORADO SPORT	Invoice #: 280692
Address 2:	Lic No: MINE03	Key Tag:
City,State,Zip/Postal Code: COPLAY, PA, 18037	VIN: 56I465765415454	PO Number:
Home Phone: (610) 666-6666	Color: BLACK	Email Address: bhartman@aftersoftna.com
Work Phone: () -	Engline: L4-2770cc-169ol	Fleet/Wholesale: N
Other Phone: () -	Mileage In: 454564	Unit Number:
Tax Exempt#:	Mileage Out: 454564	

Service comments:

Salesperson: C. HARTMAN

Qty.	Part #	RFR	Loc	Description	Parts	Labor	Total
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FINAL INVOICE APPROVAL:

BRAKES							
2	OP/18A1622		F	F DISC BRAKE ROTOR	141.05	0.00	282.10
				TOTAL FRONT BRAKES:	282.10		
				TOTAL BRAKES:	282.10		

*** Customer Wishes To Discard Old Parts ***

PAY	AMOUNT	PARTS TOTAL	282.10
CHECK	299.03	SALES TAX	16.93
		LABOR TOTAL	0.00
TECH: 000044 C. HARTMAN		GRAND TOTAL	299.03

Thank You - We Appreciate Your Business!

INVOICE INVOICE AFS TIRE & AUTO SERVICE INVOICE