

Fax and Email

You can fax and email statements and invoices directly from FTD Mercury. Additionally, you can email delivery confirmations. The FTD Document Center allows you create custom email templates—you can write your own text, import your own graphics, and even insert customer and order information into the email message to personalize the message for each customer.


The Fax & Email Monitor application allows you to view and resend all faxes and email messages sent from your system. It informs you which faxes and email messages have been successfully sent and which have not, so that you can ensure you are reaching all of your customers.

You can fax and/or email statements to your customers rather than (or in addition to) sending statements through the mail. Faxing and emailing statements to your customers saves hours of time printing statements and stuffing envelopes. Over time, it can save you thousands of dollars on labor, statement paper, envelopes, and stamps. See [Statements](#) on page 18–4 for more information on faxing and emailing statements.

You can also fax or email invoices from Ticket Search. See [Faxing and Emailing Invoices](#) on page 9–70.

Fax & Email Monitor Application

The Fax & Email Monitor application allows you to monitor faxes and emails that have been sent (or are pending or scheduled to be sent) from your store via FTD Mercury. For example, if statements/invoices have been sent via fax or email, or if you send email delivery confirmations, you can use this application to view the status of the faxes and email messages sent. If there is an error associated with a fax or email message, you can use this application to resend it. You can also select a different phone number or email address for the fax or email message.

The Fax & Email Monitor automatically attempts to find new faxes and email messages every minute. However if you want to refresh the display automatically, click the  (Refresh) button in the toolbar.

The menu bar, toolbar, and Details button at the bottom of the screen allow you to perform different functions in the program, such as resend a fax or change a fax number. These three items access the same options, and change depending on which tab you are currently working in (for example, if you are in the Email tab, you have an option to change the email address and if you are in the Fax tab, you have an option to change the fax number).

The Fax & Email monitor has three tabs: Fax, Email, and Scheduler. The Fax tab displays by default.

Fax Tab

The Fax tab displays all of the statements or invoices that you have faxed using FTD Mercury. Below is a list of field descriptions for this tab.

NOTE You can sort the faxes by each field type by clicking on the field heading. For example, to sort by Reference Number (account ID), click the Ref No. heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-1: Fax Tab Fields

Field	Description
ID	A system-generated ID number for the fax.
Ref No.	The customer account ID.
Description	The date the fax was originally transmitted, along with a brief description to help you identify the fax.
Status	The current status of the fax transmission. Valid statuses are: <ul style="list-style-type: none"> » Pending » In Process » Completed » Scheduled » Failed - Unknown error » Failed - No answer from the destination phone number » Failed - Busy signal from the destination phone number » Failed - No dial tone available when attempting to dial out » Failed - Cancelled by user action » Failed - Fatal Error
Last Updated Date	The latest activity for the fax (for example, the last time the system attempted to send it)
Destination	The customer's fax number.
Attempts	The number of times that the system attempted to send the fax.

Email Tab

The Email tab displays all of the statements/invoices/delivery confirmations that you have e-mailed using FTD Mercury. Below is a list of field descriptions for this tab.

NOTE You can sort the email messages by each field type by clicking on the field heading. For example, to sort by Reference Number, click the Ref No. heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-2: Email Tab Fields

Field	Description
ID	A system-generated ID number for the email.
Ref No.	The customer account ID (for statements) or ticket number (for invoices).
Description	The date the email was originally transmitted, along with a brief description to help you identify the email.

Table 22-2: Email Tab Fields (cont.)

Field	Description
Status	The current status of the email transmission. Valid statuses are: <ul style="list-style-type: none"> » Pending » Completed » Scheduled » Failed - SMTP Server is unavailable » Failed - Invalid SMTP Credentials » Failed - Sender domain is invalid » Failed - Unknown error » Failed - User cancelled the scheduled delivery
Last Updated Date	The latest activity for the email (for example, the last time the system attempted to send it)
Destination	The customer's email address.
Attempts	The number of times that the system attempted to send the email.

Scheduler Tab

The Scheduler tab displays all faxes or emails that are waiting for the next interval time to be sent (the scheduled time is displayed in the Scheduled Date/Time field). If you set up your system so that faxes and emails should be sent at a specified later time, these faxes and emails display in this tab until they are sent. Scheduled marketing campaigns also display in this tab.

Below is a list of field descriptions for this tab.

NOTE You can sort the rescheduled items by each field type by clicking on the field heading. For example, to sort by Type, click the Type heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-3: Scheduler Tab Fields

Field	Description
ID	A system-generated ID number for the item.
Type	This field indicates if the rescheduled item is a Fax or Email.
Description	A short description of why the item was rescheduled.
Status	The current status of the item. Valid statuses are: <ul style="list-style-type: none"> » Scheduled » Completed » FailedUnknown
Posted Date/Time	The date and time that the fax or email was originally to be sent.
Scheduled Date/Time	The next scheduled attempt to send the fax or email.

Logging Into the Fax and Email Monitor Application

TASK To access the Fax and Email Monitor:

- 1 If you are already logged into FTD Mercury, on the **Tools** menu, click **Fax and Email Monitor**. If you are not logged into FTD Mercury, double-click the **Fax & Email Monitor** icon on your desktop.
- 2 On the **Login** window, in the **Login Name** field, enter your FTD Mercury login name.
- 3 In the **Password** field, enter your FTD Mercury password.
- 4 Click **Login**.

Manually Deleting Email Messages and Faxes

To reduce clutter in the program, Fax & Email monitor purges email messages and faxes after 30 days. However, you may want to manually delete email messages or faxes earlier.

TASK To manually delete email messages and faxes:

- 1 Click one or more faxes or email messages that you want to delete. To select multiple items, hold the **Ctrl** key while you click items.
- 2 Right-click on an item you selected and click **Delete**.

Resending a Fax

If the fax failed to transmit for any reason, you can resend it.

TASK To resend the fax using the same phone number:

Right-click the fax in the list and click **Retry**.

TASK To resend the fax using a different phone number:

Right-click the fax in the list and click **Change Fax Number**.

Resending an Email Message

If the email message failed to transmit for any reason, you can resend it.

TASK To resend an email message using the same email address:

Right-click the email message in the list and click **Retry**.

TASK To resend the email message using a different email address:

Right-click on the email message and click **Change Email Address**.

Rescheduling Jobs

You may need to send a job at a different time than it was originally scheduled. You can reschedule a job so it is sent immediately, or you can specify a new date and time to send it.

- TASK** **To reschedule a job to be sent immediately:**
- 1 Right-click the job and click **Reschedule**.
 - 2 In the window, select the **Send Now** option.
 - 3 Click **OK**.
- TASK** **To reschedule a job to be sent at another specified time:**
- 1 Right-click the job and click **Reschedule**.
 - 2 In the window, select the **Send Later** option.
 - 3 Specify the date and time to send the job.
 - 4 Click **OK**.

