

FACTS

FaxLink

Release 7.5

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Preface

Welcome to the FACTS System software that automates your business operations! The FACTS System is composed of 22 highly integrated modules. Each module has a manual dedicated its use and functionality. For ease of use, the manuals are formatted similarly. All of the FACTS manuals contain the following sections: system overview, program descriptions, references, glossary of terms, and sample reports.

System Overview

This section discusses the function and process flow for each module. Each System Overview section contains:

- An overview of each module and its interaction with other modules
- Flow charts of the module's system
- An overview of the modules posting to the General Ledger. This section should be reviewed even if the General Ledger Module is not being used
- Procedures and close-out checklists for daily, weekly, periodic (monthly) and yearly processing

Program Descriptions

These chapters detail each program in the module. Each program description includes the functions, user inputs, and a screen print. The programs are listed in the order that they appear on the menu. There is an overview preceding each menu that explains the interaction of the programs within the menu.

References

Throughout the documentation the phrase (ref. #) is used. This is referring to the appendix called "References."

References are used to prevent the same information from being repeated one program to the next. They are located at inputs where a user might want further information. References are always numbered. For example, F2 allows a search (ref.5): this indicates that pressing F2 will allow a search on the input, and more information on searches can be found in the Reference Appendix under reference #5.

Glossary of Terms

The glossary provides a definition of terms used in the manual and related terms from other modules.

Sample Reports

This section provides a sample printout of most of the reports and prints in the module. A directory is included that lists each report and the page number in the section.

CHAPTER 1

System Overview

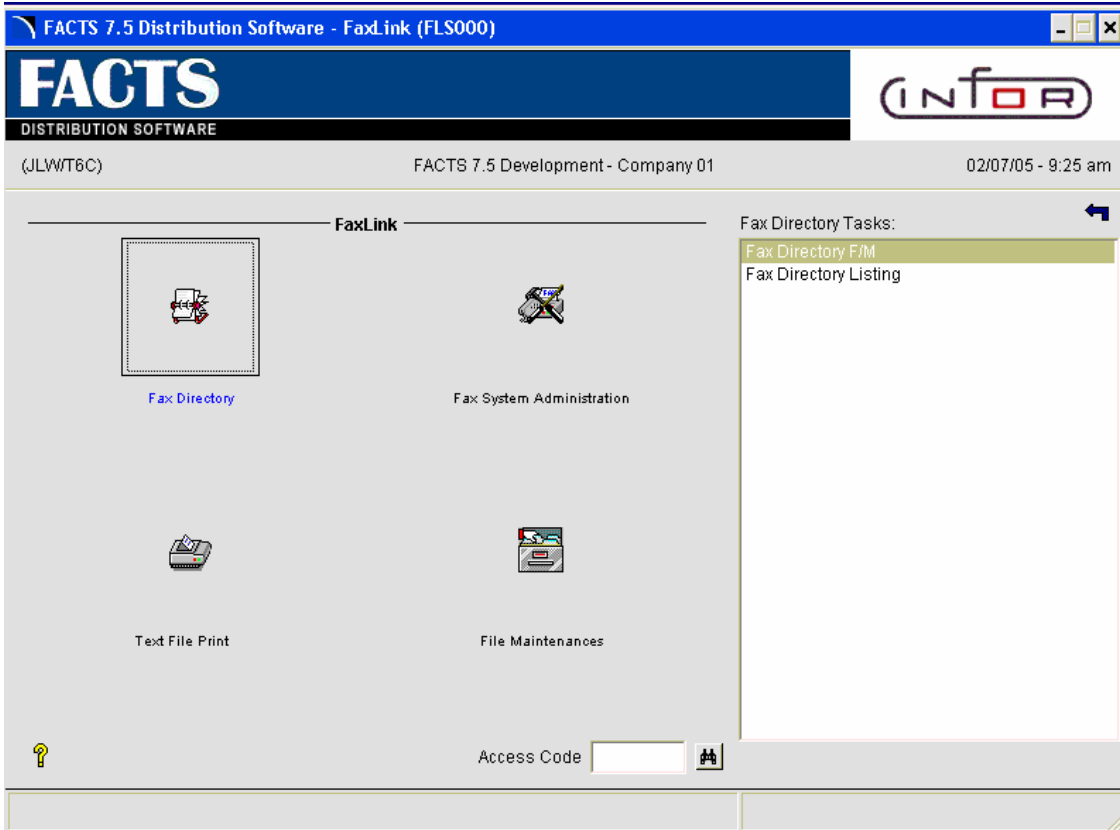
FaxLink is FACTS add-on module that provides desktop Faxing capabilities for all FACTS report and print programs.

The FaxLink module uses VSI-FAX Gold Series, which runs on UNIX and NT systems. VSI-FAX ships with one server license and five client licenses; however an unlimited number of FACTS users can send Faxes from inside FACTS.

Users simply select the Fax modem as they would a printer, and the system displays the Fax Information Entry window, where they enter their Fax request information.

You can Fax a document to as many as 9,999 recipients and as few as one. If for any reason the Fax request could not be transmitted successfully (i.e., busy signal, wrong phone number, etc.), the system displays trace logs so the Fax Administrator can troubleshoot the problems.

For additional information and technical support on the VSI-FAX software, contact V-Systems, Inc. (949) 489-8778, option 2 or Email Support@VSI.com

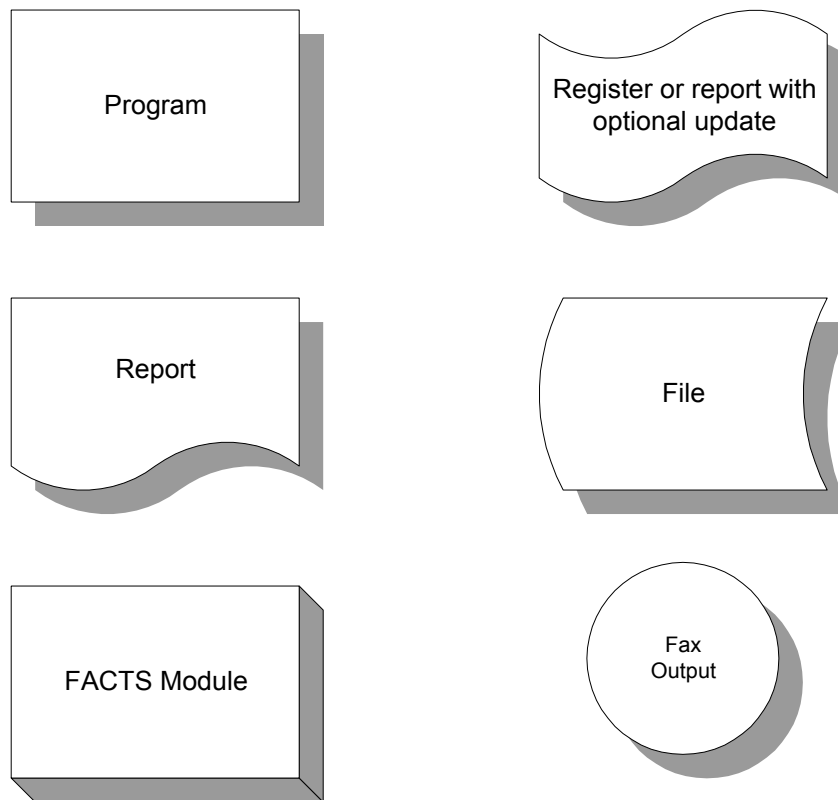


FaxLink Flow Charts

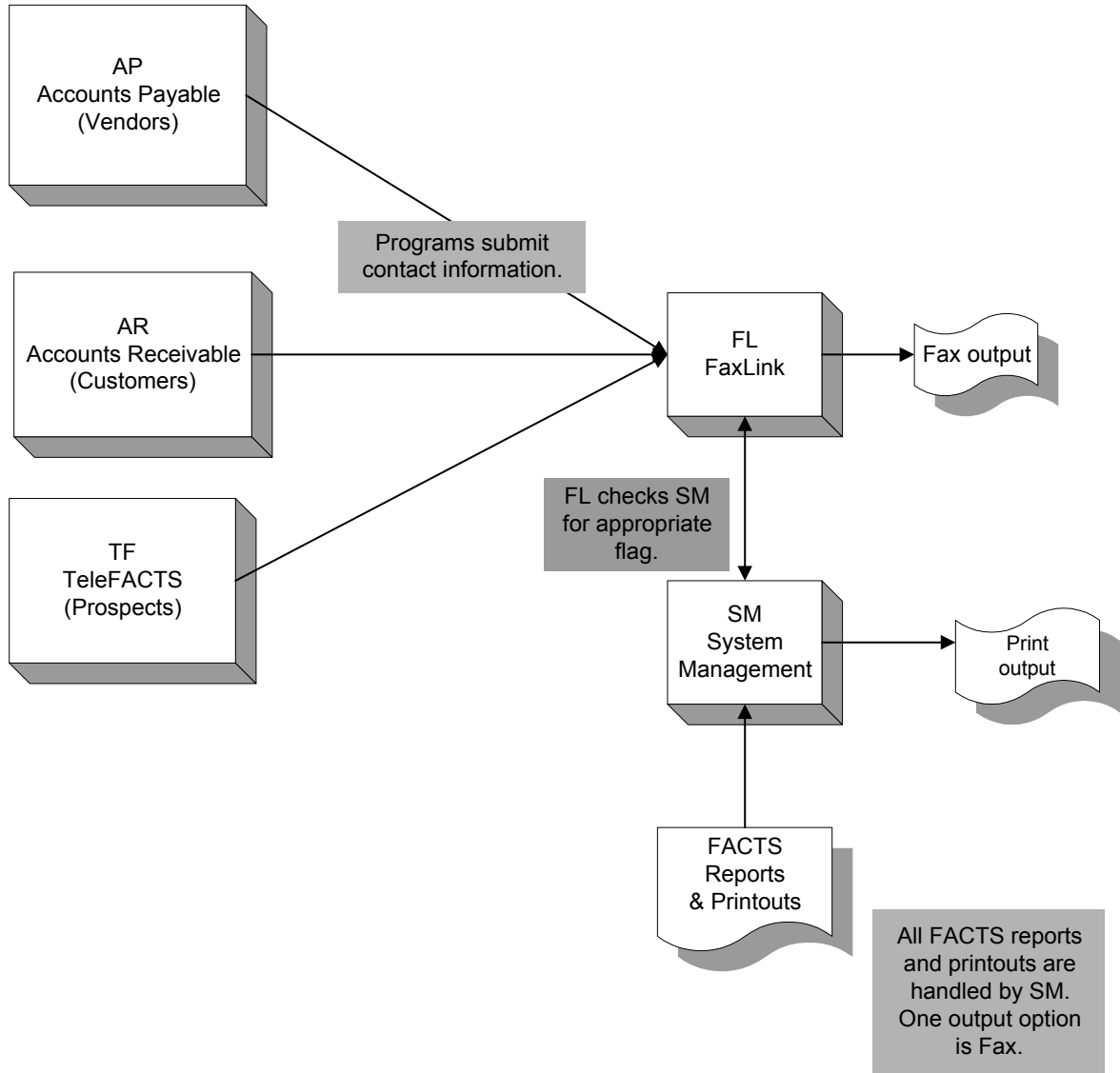
The following pages present flow charts that illustrate the flow of information to FaxLink from other FACTS modules. Any report that can be printed from FACTS may also be faxed with FaxLink.

Note that not all files and programs are shown. The flow charts simply present how information flows through the system.

The following symbols represent the types of information shown on the flow charts.



FAXLINK INTERACTION WITH FACTS MODULES



Fax Information Entry (FLC100)

Function

This program allows the FACTS user to enter the information necessary to create a Fax request.

Any FACTS program that generates a report or printout can be faxed. Print screens and Job Stream Entry printouts can also be faxed. When the system prompts for the output device, select **F-Fax Modem**. The system will display the Fax Information Entry screen.

The Fax Information Entry Screen consists of three parts. The upper portion of the screen, called the header, includes the Fax sender, cover page, global memo, transmission time, Fax options, compressed print, and phone suffix information. The middle portion of the screen, called the line-item section, includes the Fax recipient information. Recipients can be entered on-the-fly or pulled from the Fax directory. Once all recipients have been entered, the ending routine will prompt for any inputs necessary prior to the Fax transmission. The ending routine displays the recipient destination(s), and allows header or line item changes, or cancellation of the Fax request.

Header Entry

1. Sender

The system defaults the Sender's name, default cover page, and Fax suffix from the SM User Code F/M record for the current user. This name appears on the cover page of the Faxed transmission. Press **F3** to accept all header defaults.

2. Cover

Enter the cover page code (4 characters). Press **F1** for No Cover or **F2** to search for an existing cover.

3. Memo

Enter **Yes** if you want to add a global memo. The memo entered here is a global memo and will be transmitted to each Fax recipient (Ref. 3). An individual memo can be entered during line item entry. **CR** defaults to **No**.

4. Transmission Time

Enter the time to send the Fax request in the format HH:MM ?M (AM or PM). **CR** defaults to ASAP.

5. Options

Enter the Fax option code for the fax transmission. Fax Option Codes are set up in Fax Option Code F/M (FLF970).

6. CP - Forced Compressed Print

Enter whether to force compressed print. **CR** defaults to No. This function is optional since FACTS automatically uses compressed print when required.

7. Suffix

The default value from SM User Code F/M will display. You can override this value. The dialing suffix is used if an accounting code is required by the phone system for making local or long distance phone calls. This prompt may not be required based on the Suffix flag in FL Static Control.

Fax Header Information Entry

This completes the header portion of the Fax Information Entry Program. Header information can be changed prior to completing the ending routine functions.

Line Item Entry

1. Fax Phone Number

Enter the Fax phone number, a Fax class, or Fax group. When adding a long distance number, include the long distance prefix **1** and the area code. If an additional dialing prefix is required by the phone system to access an outbound phone line, set the prefix in FL Static Control.

To Fax by class, such as "South East Customers", enter the Fax class code from Fax Class F/M.

To Fax by group, such as "South East & West Customers", enter the Fax class code from Fax Class F/M.

2. Recipient

Enter the Fax recipient's name. The recipient's name will default from the Fax phone directory if the Fax phone number matches an entry in Fax phone directory.

3 Cover Page

This input is initially skipped and defaults to the value in the header. To access this field, press **F4-Backup** from the Memo field. Enter the cover page code from Fax Cover Page F/M. **CR** accepts the default value.

4. Memo

Indicate whether or not to include a memo on the Fax cover page. The memo entered here is considered to be an individual memo since it will be transmitted to this recipient, only. The global memo, transmitted to all recipients, is entered in the header.

FAX ENTRY		FAX INFORMATION ENTRY		FLC100
01-FACTS 7.1 Development		FAX INFORMATION ENTRY		FLC100
BATCH# 000291		COVER NONE		MEMO N
SENDER GUI		CP N		SUFFIX
TRANSMISSION TIME ASAP				
FAX PHONE #	RECIPIENT	COVER	MEMO	
ADD 5565556		NONE	N	
1				
2				
3				
4				
5				
6				
IS THIS A LONG DISTANCE CALL? (N/Y), F4-BACKUP N<				<input type="button" value="N"/> <input type="button" value="Y"/> <input type="button" value="Backup"/> <input type="button" value="OK"/>

Fax Line Item Entry

This completes the line item portion of the Fax Information Entry Program. Line item information can be changed prior to completing the ending routine functions.

After you complete the Line Item Entry, the system displays the Fax Cover Page screen, where you can enter additional Recipient and Sender information for the fax. Recipient information defaults from the Fax Entry screen and Sender information defaults from the user's login. You can enter a contact name company name, fax number, contact phone number, address (for use in Fax Directory F/M only – not the fax cover sheet), email address information and a subject line for the cover sheet. When you have complete the cover page information, press the OK button or Enter (CR) to return to ax Information Entry.

Recipient Information:		Sender Information:	
Name:	Bob Jones	Name:	George U. Invincent
Company:		Company:	Demo Company
Fax#:	770 765 3551	Fax#:	
Phone#:		Phone#:	(770) 418-2000
* Address1:		Address1:	69 South Peachtree Street
* Address2:		Address2:	Atlanta, GA 30030
* Address3:		Address3:	
* Not for use on cover page, but for fax directory F/M only		Country:	
		E-Mail:	
Subject:			

Footer inputs

1. Add to Fax Phone Directory? (N/Y), F4-Backup

Indicate whether to automatically add the cover page information to Fax Directory F/M (FLF910).

2. Is This a Long Distance Call? (N/Y), F4-Backup

Indicate whether this call is long distance. The system checks the Use Suffix flag in the Static Control F/M (FLF980) program to use whether to attach the suffix code entered in input #6. The dialing suffix is used if an accounting code is required by the phone system for making local or long distance phone calls.

The ending routine allows you to perform such functions as cancel the Fax; add, change or delete line-items (recipients); change the header information; or process the Fax request.

The total number of Fax recipients is displayed at the bottom of the screen. OK or CR (Continue) will process the request(s). A "Fax Transmission" box will display the Fax request job number and each job will be submitted to the Fax scheduler for transmission. F1- Cancel will cancel all Fax requests. F2- Change Header will allow you to change header data. F3-Change Line Items will allow you to change line item data.

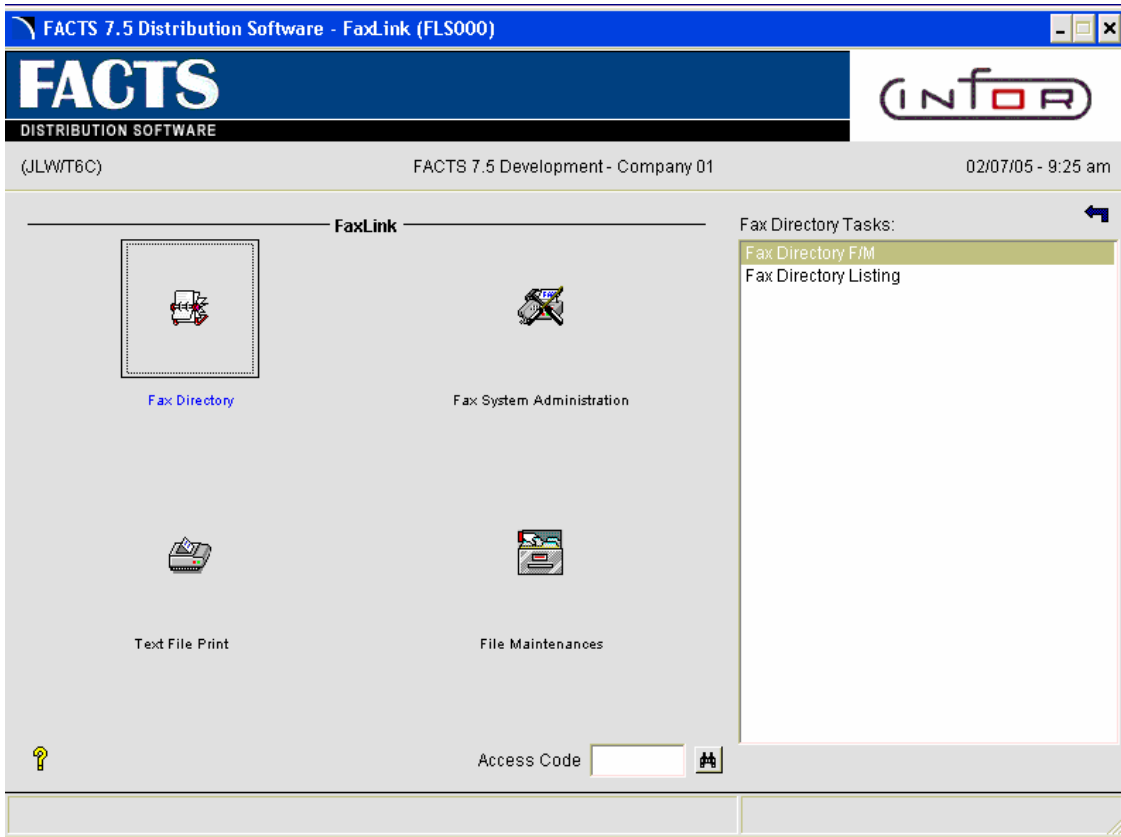
Technical Notes

UPDATED FILES: FLFBTH, FLFBTL, FLJBTH, FLJBTL, FLHNOT, FLLNOT, FLJNOT, FLJLNT

CHAPTER 2

FaxLink Directory

The programs on the Fax Directory Menu enable you to define a Fax phone directory for anyone Faxed on a regular basis and to obtain a listing of those records.



Fax Directory F/M (FLF910)

Function

Before you can set up a Fax record for a customer or vendor record, they must be defined in the appropriate FACTS F/M program. Fax Directory records can be created for existing customers or vendors and any other Fax recipient. When creating a record based on an existing customer or vendor, corresponding data will be pulled from the customer ship-to or vendor ship-from record. When creating a record that is not based upon an existing customer or vendor, the system will prompt for the necessary information.

When adding a new customer, customer ship-to, vendor or vendor ship-from record in FACTS, the system asks if an associated record should be created in the Fax directory automatically. When deleting a customer, customer ship-to, vendor or vendor ship-from, the associated Fax directory record must be deleted first.

USER INPUTS

***. ID Type**

Enter the code for the Fax record type: Customer, Vendor, or blank to indicate Neither. CR defaults to blank.

***. Number**

Enter the FACTS customer or vendor number. This input is skipped if ID Type is neither customer nor vendor.

***. Ship**

Enter the FACTS customer ship-to number or the vendor ship-from number. This input is skipped if the ID Type is neither customer nor vendor.

4. Description

Enter the description for this entry. This information will default from the FACTS customer or vendor record if the ID Type is customer or vendor.

5. Fax Phone#

Enter the Fax phone number for this record. Hyphens are optional. Include the prefix **1** for long distance numbers.

6. Contact

Enter the contact for this record.

7. Voice Phone#

Enter the voice phone number for this record. Access to this field is restricted if the ID Type is customer or vendor.

8. Address 1

Enter the address 1 for this record. Access to this field is restricted if the ID Type is customer or vendor.

9. Address 2

Enter the address 2 for this record. Access to this field is restricted if the ID Type is customer or vendor.

10. Address 3

Enter the address 3 for this record. Access to this field is restricted if the ID Type is customer or vendor.

11. Branch

Enter the branch for this record. The system uses the branch code from the associated FACTS customer or vendor record if the ID Type is customer or vendor.

12-16. Class 1-5

Enter the class(es) to associate with this entry.

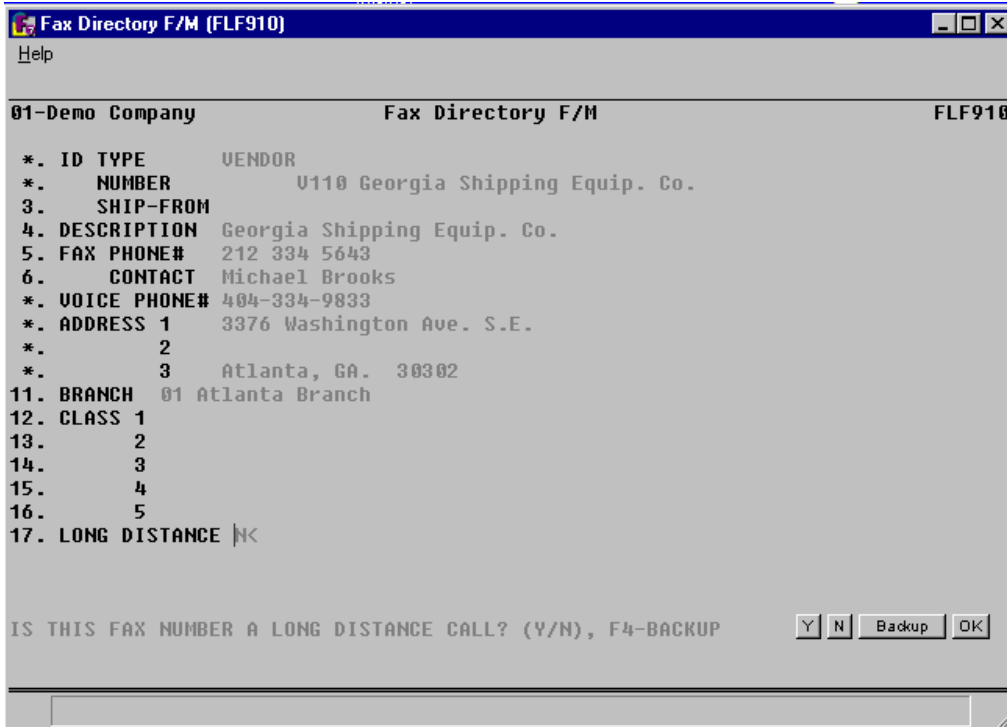
17. Long Distance

Indicate whether the Fax number is a long distance call.

Technical Notes

FILE USED: FLFAXN, FLCLAS, ARCUST, APVEND, ARSHIP, POSHIP, FLFGRP

FILE UPDATED: FLFAXN, FLFGRP



Fax Directory Listing (FLR710)

Function

Use the Fax Directory Listing program to print or reprint a listing of the Fax directory records.

You have the option to:

- Print in alpha order by contact name or description, or numeric order by Fax number
- Select the print range
- Print a listing by branch
- Select the Fax class

USER INPUTS

1. Enter Print Order

Select the order in which to print the listing: Alpha order by the description field, Fax Phone Number, or by Contact name. **CR** defaults to Alpha.

2. Beginning Order Choice

Enter the beginning alpha, Fax number or contact to print (Ref. 1). **CR** defaults to **FIRST**.

3. Ending Order Choice

Enter the ending alpha, Fax number or contact to print (Ref. 2). **CR** defaults to **LAST**.

4. Branch

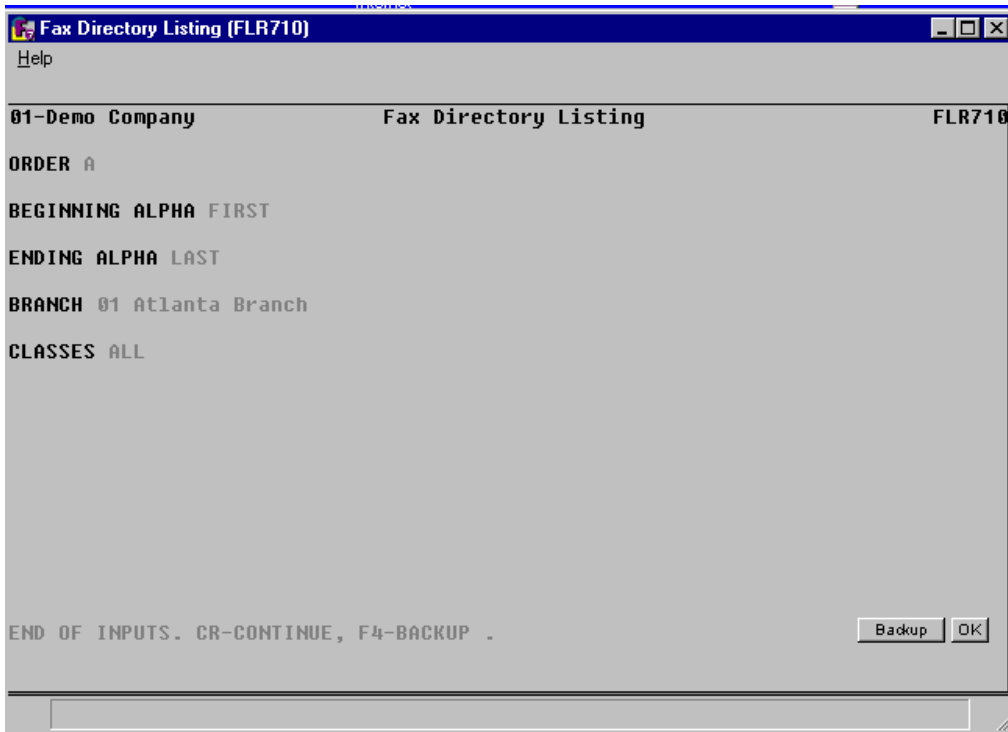
Enter the branch code to include. **CR** defaults to the branch in SM Terminal Code F/M. Press **F3** for **ALL** branches.

5. Classes

Enter the class(es) to include. For example, to include classes CL1, CL2 and CL3, enter **CL1CL2CL3**. **CR** defaults to **ALL**.

Technical Notes

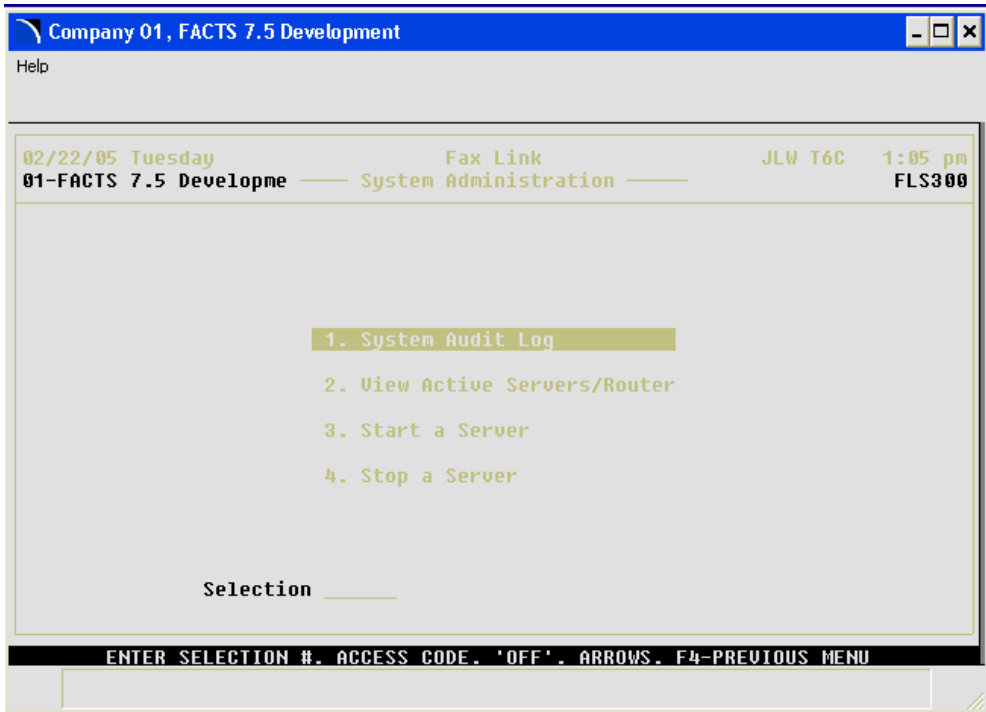
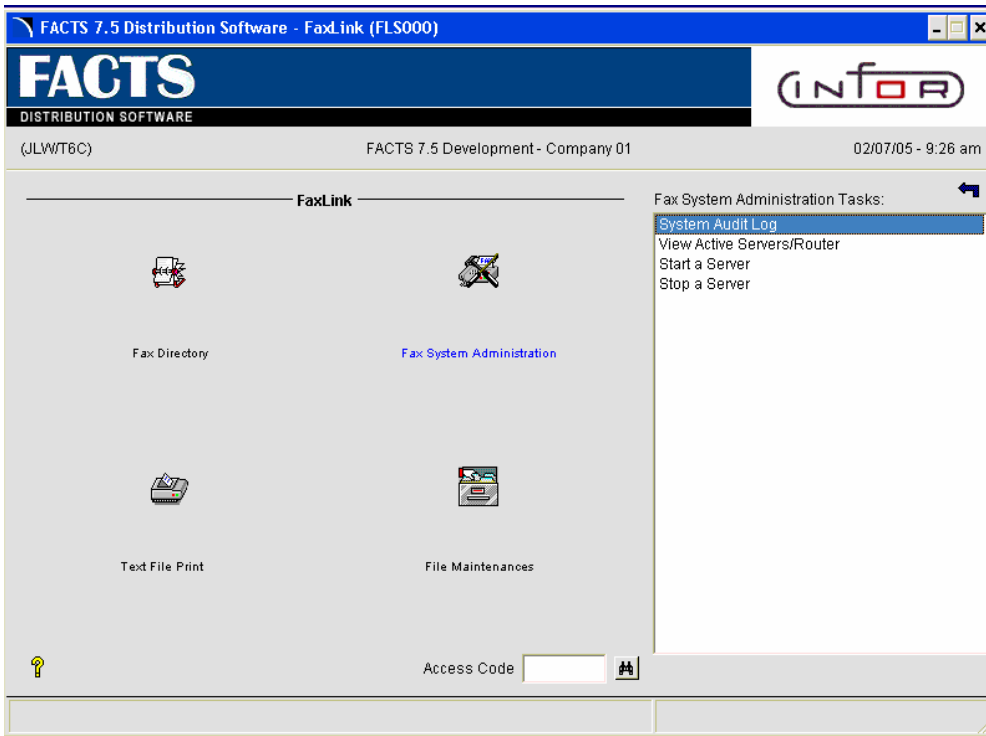
FILES USED: FLFAXN, FLCLAS



CHAPTER 3

Fax System Administration

Use the programs on the Fax System Administration Menu to create and maintain the Fax server and router.



System Audit Log (FLI310)

Function

This program displays a list of the activity on the server since the last time the server was started. Detailed information is displayed for each processed Fax request, including:

- the time the request was submitted
- the Fax request number
- User code (Fax sender)
- Total page in request
- Total pages acknowledged
- transmission result
- the phone number

User Inputs

1. Enter Beginning Date to Display

Enter the beginning date to display. **CR** defaults to the system date.

- ➡ This program must be run from the server. Client PCs cannot access this program.

System Audit Log (FLI310) Help

01-FACTS 7.5 Demo Page 1 of 1
Line 1 of 2

ReqId	Submitted	User	Phone Number	Company	Result
1069	10/25 15:31	JED	8,7704182022		NORMAL
1068	10/25 14:49	JED	8,7704182022	INFOR	NORMAL

Enter G-Go to page, F2-Text search, F4-End |. Arrows: Up, Down, Left, Right, PgUp, PgDn, Home, End

Go To Page Text Search End OK

View Active Servers/Router (FLI350)

Function

This program allows the Fax administrator or superuser to view current activity for the server and devices if multiple modems are used.

To view active servers and/or routers:

Open View Active Servers/Routers from the Fax System Administration menu.

➤ This program must be run from the server. Client PCs cannot access this program.

```

View Active Servers/Router (FLI350)
Help
-----
01-FACTS 7.5 Demo Page 1 of 1
Line 1 of 19
Server on bopeep has been up since 01/27 17:00
Server time is 03/02 11:25
Server load bias is 5
Server differential bias is 5

Default destination : fax1

Device      Jobs  Ready  Acc  Ena  Snd  Rcv  FIM  Inbox  Port
-----
fax1         0      0  yes  yes  yes  yes  c2   usifax /dev/tty2a
lb           0      0  yes  yes  yes  no   lb   N/A   <none>
lcr          0      0  no   no   no   no   hold N/A   <none>
sm           0      0  yes  yes  yes  no   sm   N/A   <none>

Device      Comments          State
-----
fax1        <none>            Idle
lb          LoopBack          Idle
lcr         LCR hold queue   Not running [Holding queue only]
sm          SendMail          Idle

Enter G-Go to page, F2-Text search, F4-End .
Arrows: Up, Down, Left, Right, PgUp, PgDn, Home, End
Go To Page  Text Search  End  OK
  
```

Start a Server (FLU350)

Function

This program allows the Fax Administrator or superuser to start a server if it has shut down for some reason. It automatically starts the server as it opens. If the server is already running, this program finds a message to this effect. Press F4 to exit.

If you run multiple modems, this program starts each of them.

➡ This program must be run from the server. Client PCs cannot access this program.

Stop a Server (FLU360)

Function

This program allows the Fax administrator or superuser to stop the Fax server. If the server is already down, a message appears to that effect. If Faxes are in process, VSI-FAX performs a **soft shut down**, which allows the Faxes to continue through before it shuts down the server.

➡ This program must be run from the server. Client PCs cannot access this program.

CHAPTER 4

Text File Prints and Quick Note Entries

Text File Print enables FACTS users to Fax or print the contents of a text file. The text file must be at least 20 bytes in size and contain no graphics.

Quick Note Entry lets FACTS users to enter and send a cover page only transmission. The note may be sent via the FACTS OA message system, printed or Faxed.

Text File Print (SMR910)

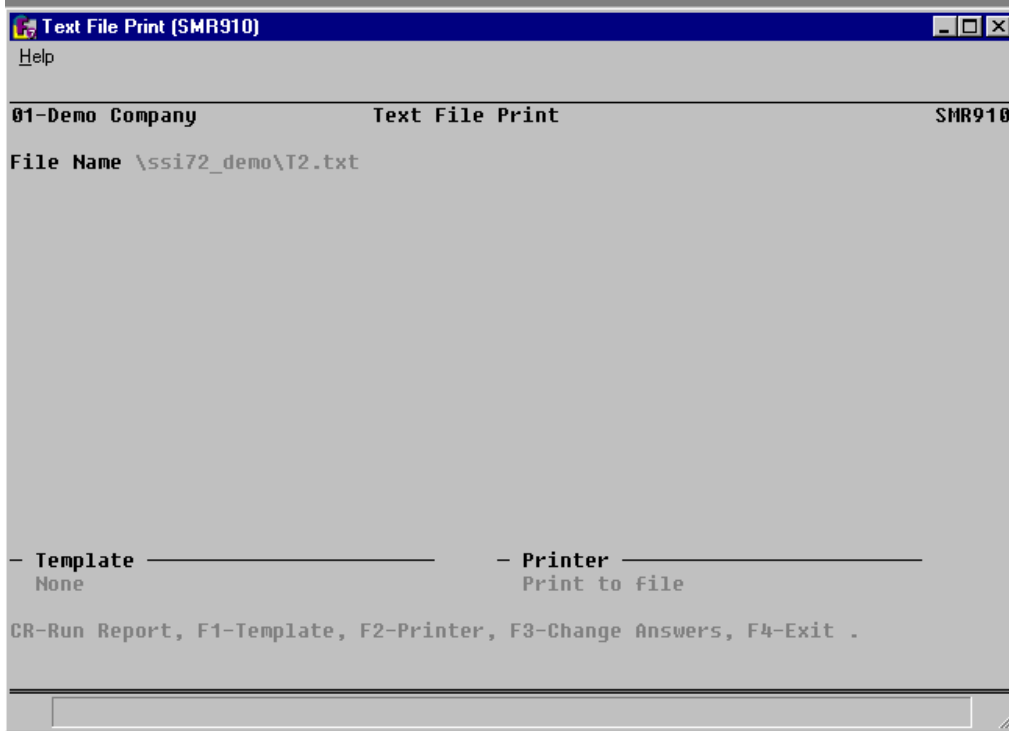
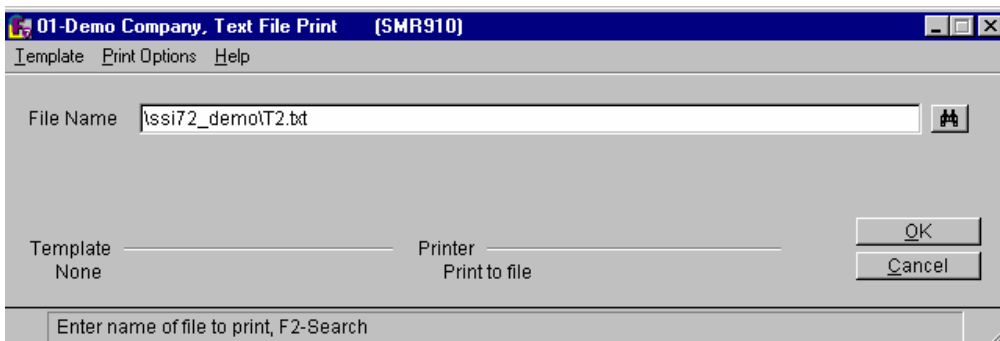
Function

This program allows the FACTS user to Fax or print a text file that contains at least 20 bytes. Graphic files cannot be Faxed or printed with this program.

USER INPUTS

1. File Name

Enter the file name to Fax or print. Press F2-Search to locate a file.



Quick Note Entry (SME210)

Function

This program allows the FACTS user to enter notes or messages (quick notes) that are to be printed to a printer, Faxed as a cover page only transmission, and/or sent as an OA message in the Office Automation system. The message may be up to 999 lines. The entered message may be printed, Faxed and sent as an OA message to as many destinations as needed up until the user exits the program. The message is discarded once the user exits the message screen. The Quick Note Entry program is found on the SM Message Menu or can be accessed directly from any menu by entering the access code **NOTE**.

USER INPUTS

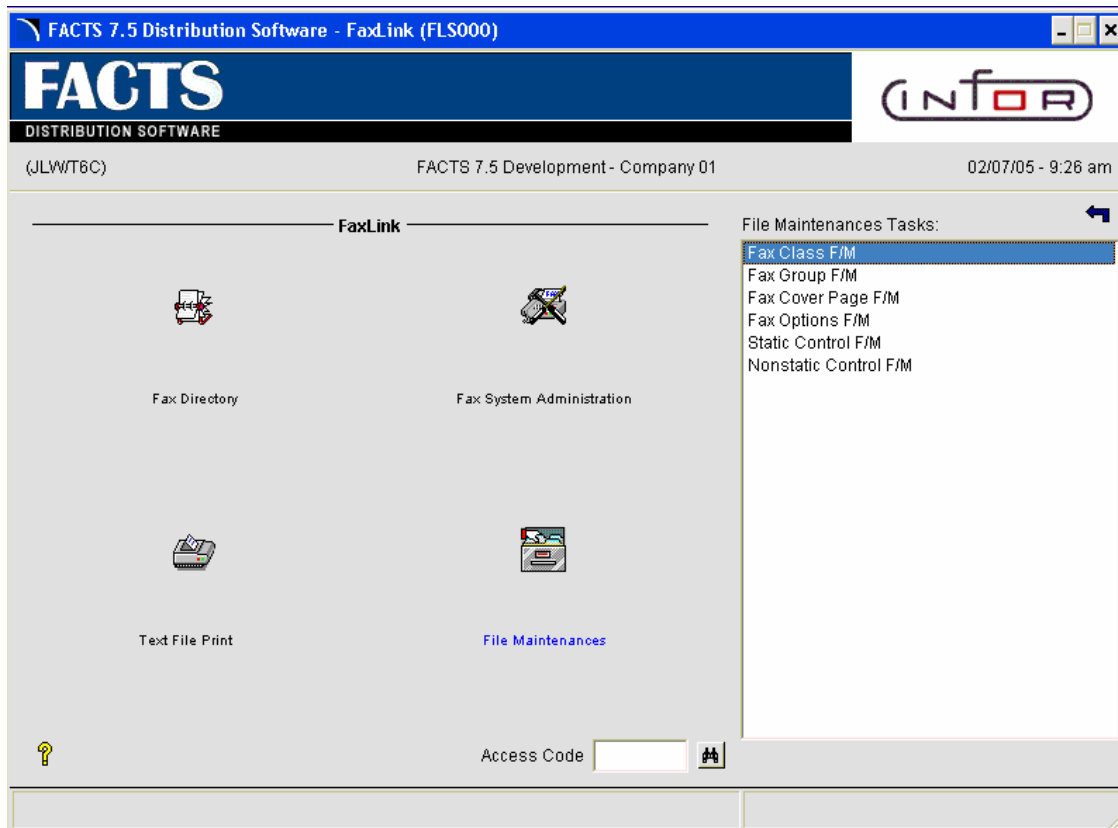
1. Enter Note

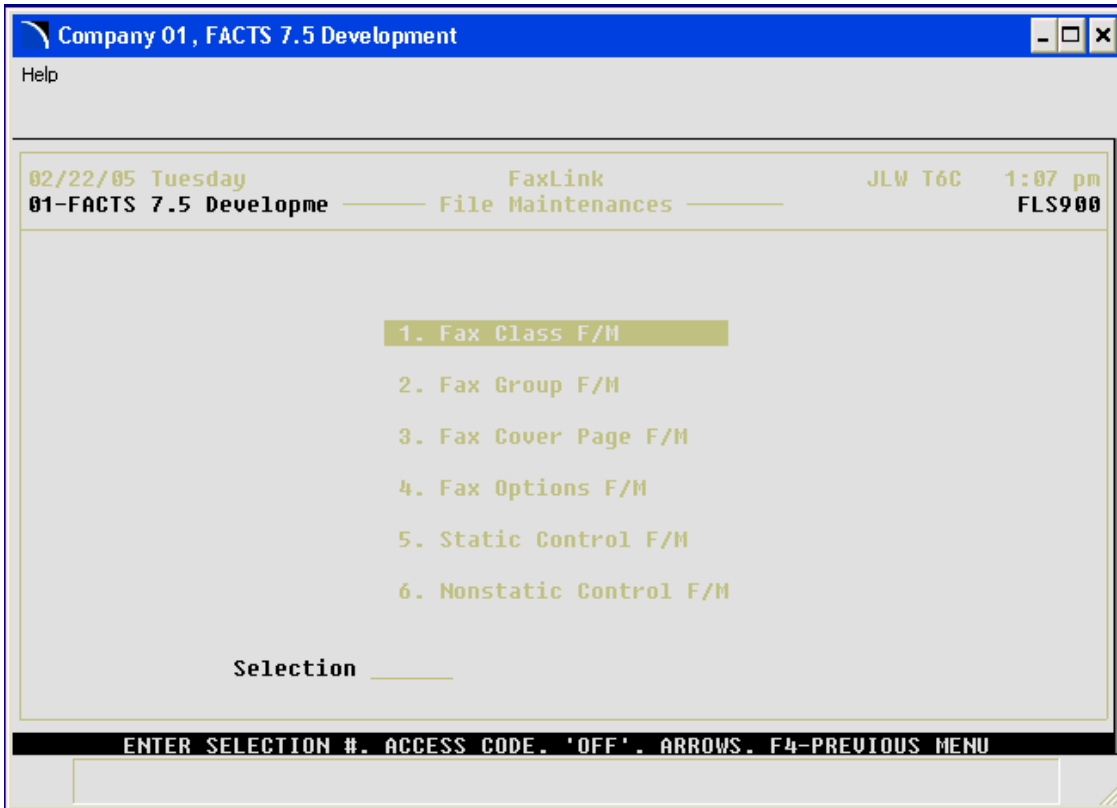
Enter the note or message to be entered. While entering notes, line numbers are assigned beginning with 001 and will automatically increment by 1. Enter text (up to 70 characters per line) and the program will wrap to the next line when the end of a line is reached or when the user presses CR. **F3** ends entry of the lines. Lines can be **added**, **inserted**, or **deleted**. Transmission options include: **Print**, **Fax** cover page, and/or create **OA** through the FACTS OA system. Access to the OA system may be restricted.

When you select the Fax option from the printer list, the Fax Information Entry screen appears so you can set up the Fax. Refer to the Fax Information Entry topic in the Overview section of this document.

File Maintenances

The programs on the FaxLink File Maintenance menu allow the Fax Administrator or superuser to create and maintain various options used by FaxLink. Options include Fax class and group, cover page maintenance, Fax preparation and transmission options, and the static and nonstatic controls for FaxLink.





Fax Class F/M (FLF920)

Function

This program provides the FACTS user an easy method to categorize Fax records for preparing and sending Fax requests. For example, all customers can be assigned to a specific class by sales region. By using a Fax class, all customers in a class can receive the same Fax without having to enter their recipient information line by line.

Sample classes could include: customers by sales region or by sales volume, and vendors by merchandise type or service provided.

USER INPUTS

1. Class

Enter the code to use for the class (up to 3 characters).

2. Description

Enter the description for this class (up to 30 characters).

Technical Notes

FILES USED: FLCLAS

FILES UPDATED: FLCLAS

Fax Class F/M (FLF920) [] [] [X]

Help

01-Demo Company Fax Class F/M FLF920

*. CLASS ECC
2. DESCRIPTION East Coast Customers

Delete New Entry

LINE # TO CHANGE (F2-CONTINUED), CR-NEXT, D-DELETE, F4-NEW ENTRY |..

Fax Group F/M (FLF930)

Function

This program allows the FACTS Fax Administrator or superuser to create and maintain Fax groups. Fax groups are used to generate broadcast Faxes. Each group may consist of up to 40 members. The members in the group must all be one of five types: customer Fax records, vendor Fax records, Fax directory records, defined classes or other defined groups. For example, a group type may be customer Fax records or vendor Fax records, but cannot be both.

Although a group can only have 40 members, the number of Fax records in the group is unlimited because the group can be a combination of classes or other defined groups. For example, you can define one group of customers Fax records and another group for vendors Fax records. You can then define a third group that includes the customer group and vendor group.

When you combine classes and groups, you may find that some records are included in the group more than once. When you prepare a Fax and select multiple classes and groups, FaxLink will send only one Fax to records that are duplicated.

User Inputs

1. Group Code

Enter the code to use for the group (up to 3 characters). **F2** allows a search for group codes already defined (ref. 4). **F3** allows you to display the next record on file.

2. Description

Enter a description that will help you to identify the group (up to 30 characters).

3. Type

Enter the code for the type of records to combine in the group. The codes you may select are **F**-Fax directory records **C**-customer Fax records **V**-vendor Fax records **K**-classes **G**-groups. CR defaults to **F** for Fax directory records. If you change this type after group members have been assigned, all group members will be deleted.

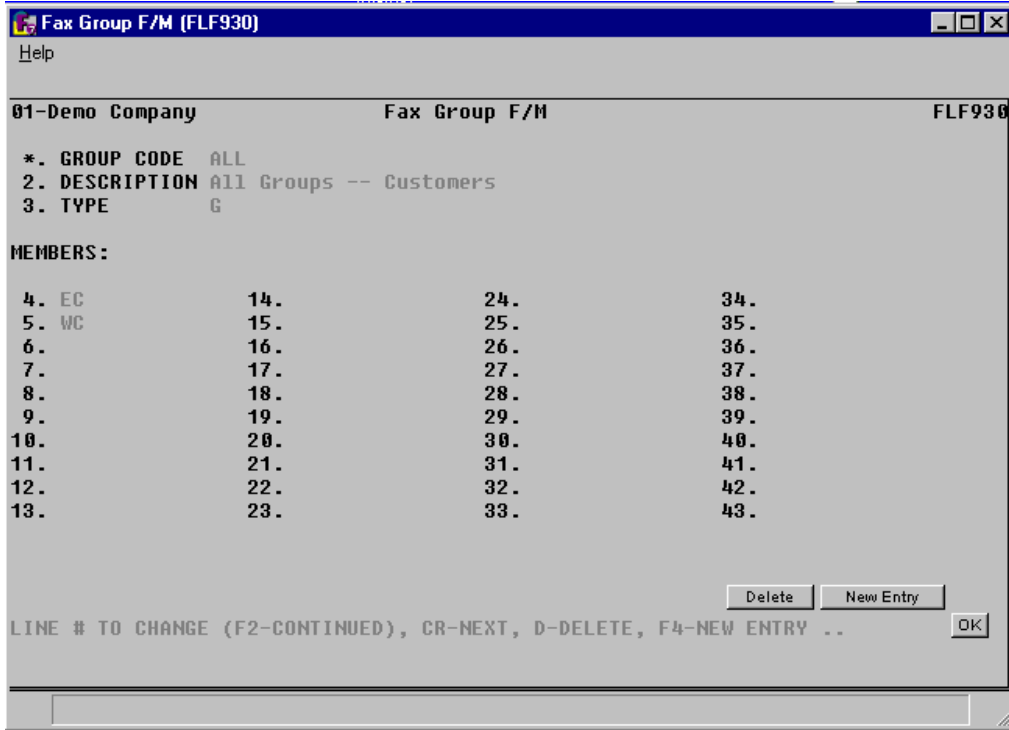
4-43. Members

Enter one code for each of the next 40 fields to define the members to include in this group. **F2** allows a search for the designated type of records to include (ref. 4). If you select group for the member type, **F1** allows you to display all members assigned to the group.

Technical Notes

FILE USED: FLFGRP, ARCUST, APVEND, FLCLAS, FLFAXN

FILES UPDATED: FLFGRP



Fax Cover Page F/M (FLF940)

Function

This program allows the FACTS Fax Administrator or superuser to create and maintain various Fax cover pages. A standard cover page is included with FaxLink. The standard cover page can be used as is or used as an example to design a custom cover page. When multiple cover pages exist, each user can specify which cover page to use as a default. The default cover page is set SM User Code F/M.

Custom cover pages can include text, expanded text, graphics files, text files, and bars. Data elements can be imbedded in the cover page. These imbedded elements will pull the actual data, such as a customer's name or company name, or a date/time stamp when the actual cover page is generated and Faxed.

User Inputs

1. Cover Page

Enter the cover page code (up to 4 characters). Code **0000** is reserved for the standard cover page provided with FaxLink.

2. Description

Enter the description of the cover page (up to 30 characters).

3. File

Enter the filename and directory path for the cover page file information. Press F2 or **F4** to access the File Search screen. On the File Search screen you can use the arrow keys on the keyboard to navigate to and select the desired file or press the **Change Dir** button or **F2** to access a different directory for file select.

CUI Users:

Press the **Enter** (CR) to save the record. Then you can:

Press **F1** to add another Fax Cover Page record

Display another record and press the **Delete** key to remove it.

GUI Users:

Press the **Save** button to save the record. Then you can:

Select the **New** button to add another Fax Cover Page record

Display another record and press the **Delete** button to remove it.

Technical Notes

FILES USED: FLCOVR

FILES UPDATED: FLCOVR

01-Demo Company, Fax Cover Page (FLF940)

Help

Cover Page

Description

Filename

Enter Cover Page Description

Fax Cover Page F/M (FLF940)

Help

01-Demo Company	Fax Cover Page	FLF940
-----------------	----------------	--------

*. Cover Page 1000
2. Description Bold
3. Filename bold.cvr

Line to Change (F2-Cont), D-Delete, F4-Backup .
Arrows: Up-Prev Rec, Dn-Next, Pgup-First, Pgdn-Last

Fax Options F/M (FLF970)

Function

Use the Fax Options F/M program to define options supported by VSI-FAX, a third-party product.

This program is accessible to the FACTS Fax Administrator or superuser. For a listing of available tags refer to VSI-FAX documentation.

User Inputs

1. Option Code

Enter the VSI-FAX tag for the fax option.

2. Description

Enter the description of the tag (up to 30 characters).

3. Parameter

Enter the syntax for the VSI-FAX tag (verbatim).


4. Press the Save button to save the record. Then you can:

Select the New button to add another Fax Option Code record

Display another record and press the Delete button to remove it.





01-Demo Company, Fax Options (FLF970)

Help

Option Code 

Description

Parameter

 Save  Delete  New  Exit

Enter Command Line Parameter for Option

Faxlink Options F/M (FLF970)

Help

01-Demo Company	Fax Options	FLF970
*. Option Code	1	
2. Description	Send Priority (High)	
3. Parameter	pri=high	

Line to Change (F2-Cont), D-Delete, F4-Backup .
Arrows: Up-Prev Rec, Dn-Next, Pgup-First, Pgdn-Last

Static Control F/M (FLF980)

Function

Fax Administrators can use this program to enter and maintain directory locations which FACTS uses to communicate with the VSI-FAX software. Normally, this program is setup during installation and should not require modifications during normal processing.

Changes to these fields will impact FaxLink and VSI-FAX operations. Do not edit the fields in the program without first consulting your local FACTS Affiliate.

☞ Since this information is critical to FaxLink operation, administrators should password protect this program. (*System Management->Security System->Password and Security Code F/M.*)

USER INPUTS

1. VSI-FAX Bin

Enter the path to the VSI-FAX Bin directory on the server.

2. Auto Send Dir

Enter the path to the VSI-FAX Auto Serial Directory on the server. FACTS stores documents in this directory and VSI-FAX picks them up when it's ready to send.

3. FAX Prep Command

This is the path to the UnForm rule file you want to use to format Faxes. This input is optional. If you do not want UnForm to format Faxes or you do not use UnForm, you can skip this entry.

4. Client/Server

Indicate whether (Y-Yes or N-No) you are running UnForm's client/server application to send faxes.

5. Use Suffix

Enter the letter for the type of suffix code to use: **N** – Do not use a suffix, **D** – Use a suffix on long distance calls only, **L** – Use a suffix on local calls only, or **B** – Use a suffix for both local and long distance call. The dialing suffix is used if an accounting code is required by the phone system for making local or long distance calls. For example if the phone system requires that a billing code be used after dialing any phone number, enter **B** in this field.

6. Fax Alias

Enter the name of the link file you created for VSI-FAX. This entry must be three characters or less. For instructions on creating link files, see Chapter 2 or

Chapter 4 of the Installation Manual and refer to the section called “Printers, Drivers and Link Files”.

7. Graphic Files

Enter the directory path where graphics files are stored for the Fax cover page.

8. Text Files

Enter the directory path to the text files are stored for the Fax cover page. If the path does not exist, the system will prompt you to create it.

9. Temp Files

Enter the directory where temporary files used and created by FaxLink should be stored. This directory essentially serves as FaxLink’s scratch pad.

☛ We recommend that System Administrators create a script that the *UNIX CRON* executes to periodically delete temporary files from this directory.

Technical Notes

FILES USED: SMCNTL

FILES UPDATED: SMCNTL

01-FACTS 7.5 Development, Static Control F/M (FLF980)

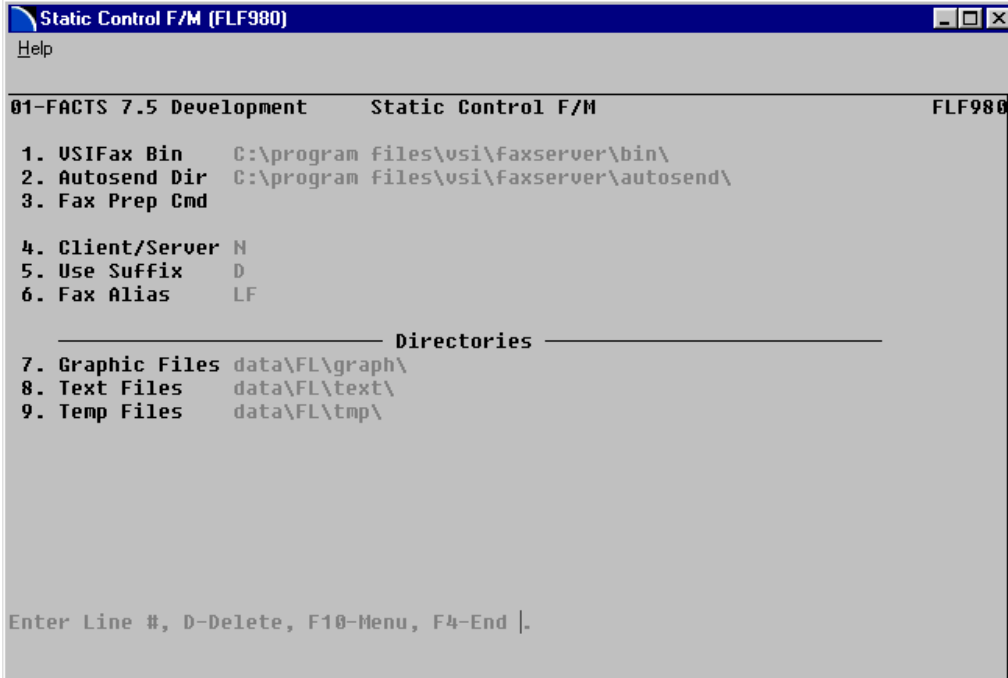
Help

VSIFax Bin C:\program files\vsifaxserver\bin\
Autosend Dir C:\program files\vsifaxserver\autosend\
Fax Prep Cmd
Client/Server
Use Suffix D - LONG DISTANCE CALLS ON
Fax Alias LF

Directories

Graphic Files data\FL\graph\
Text Files data\FL\text\
Temp Files data\FL\tmp\
Save Delete New Exit

Enter fax command bin directory



```
Static Control F/M (FLF980)
Help
01-FACTS 7.5 Development      Static Control F/M      FLF980

1. USIFax Bin      C:\program files\usi\faxserver\bin\
2. Autosend Dir   C:\program files\usi\faxserver\autosend\
3. Fax Prep Cmd

4. Client/Server  N
5. Use Suffix     D
6. Fax Alias      LF

----- Directories -----
7. Graphic Files  data\FL\graph\
8. Text Files     data\FL\text\
9. Temp Files     data\FL\tmp\

Enter Line #, D-Delete, F10-Menu, F4-End |.
```

Nonstatic Control F/M (FLF990)

Function

This program allows the FACTS Fax Administrator or superuser to create and maintain the Nonstatic Control record. The FL Nonstatic Control record is critical to the proper functioning of the FaxLink System. It contains information that the FaxLink System references in performing various functions. Normally, the Nonstatic controls are set at the time of installation and do not require manual adjustment during normal processing.

Changes to these fields will impact FaxLink and VSI-FAX operations. Do not edit the fields in the program without first consulting your local FACTS Affiliate.

☞ Since this information is critical to FaxLink operation, administrators should password protect this program. (*System Management->Security System->Password and Security Code F/M.*)

USER INPUTS

1. Last Batch

The batch number keeps track of the last number used in the FaxLink System. During installation this number should be set to 0. As a batch is generated, the system increments the last number used by one. This field is automatically updated through normal processing and should not be changed manually. **CR** defaults to 0.

2. Last FAX Record

The Fax record number keeps track of the last number used in the FaxLink System. During installation, this number should be set to 0. As each Fax is processed, the system increments the last number used by one. This field is automatically updated through normal processing and should not be changed manually. **CR** defaults to 0.

Technical Notes

FILES USED: SMCNTL

FILES UPDATED: SMCNTL

Nonstatic Control F/M (FLF990)

Help

01-Demo Company Nonstatic Control F/M FLF990

1. LAST BATCH # 000232
2. FAX RECORD # 000055

LINE # TO CHANGE (F2-CONTINUED), D-DELETE, F4-END ..

Delete End OK

APPENDIX A: References

1. Beginning order choice

Enter the beginning order choice to process. For example, if you are printing a report and you choose customer number in the **Order** field, enter the first customer to be included on the report. CR defaults to **FIRST** (for this example, the first customer number on file).

2. Ending order choice

Enter the ending order choice to process. For example, if you are printing a listing and you choose customer number in the **Order** field, enter the last customer to be printed on the report. CR defaults to **LAST** (for this example, the last customer on file).

3. Memo

The memo field allows you to enter up to 999 lines of a memo to appear on fax cover pages (up to 75 characters for each line) for any purpose. You can enter a global memo that will appear on the cover page for all recipients of the fax you are creating. You can also enter a recipient memo that will print only on the cover page for the current recipient.

For fax cover pages, you can enter data fields that will be imbedded in a memo line by enclosing the data field in curly braces ({}).

The global memo will print first, directly below the last defined element on the fax cover page. If you also enter a recipient memo, it will print after the global memo.

While entering memos, you can press F4 to back up and change the line number. CR defaults to the current line number. F2 allows you to set the line increment (1-10), which increments subsequent line number by the value entered here. Press F3 when you are finished changing the line number. When you are finished entering text for the memo, press F3 to end.

4. Search

The search feature allows you to search for various fields when little or no information may be known about them. The FL System offers searches for such fields as fax recipient, fax class code and group code. You can enter all or part of a specific word to search for, press CR to continue the listing, enter the line number of one of the fields displayed, or press F4 to return to the program.

The following references present more specific information about different types of searches.

Class Code Search

Enter all or part of a class code to begin the search. Press CR to begin the search with the first class code on file. The search window displays each class code and description. You can choose a class code by entering the line number on which it appears, or by pressing CR at the highlighted line.

In the Fax Information Entry Program, you can select multiple class codes by entering the line number or pressing CR at the selected line. This places an asterisk (*) after the line number to indicate that it has been flagged for selection. Enter the line number or press CR again to remove an asterisk. When all of your choices have been flagged, press F3 and all class codes which are flagged will be selected.

Customer Number Search

Enter all or part of a customer number to begin the search. CR begins the search with the first customer number on file. The search window displays each customer number and name. You can choose a customer number by entering the line number on which it appears, or by pressing CR at the highlighted line.

Fax Cover Page Search

Enter all or part of a fax cover page code to begin the search. CR begins the search with the first fax cover page code on file. The search window displays each fax cover page code and description. You can choose a fax cover page code by entering the line number on which it appears, or by pressing CR at the highlighted line.

Fax Directory (Alpha) Search

Enter all or part of the description (company name) to begin the fax directory search. CR defaults to the first description on file. The search windows displays each fax record, contact and fax phone number. In most programs, you can choose a fax record by entering the line number on which it appears. You can also limit the search for a specific branch, or base the search on all branches.

By default, the search is for all fax records in alpha orders by company name. F1 allows you to change the field for the search as described in the following table.

***0 - Customer** Enter **0** to search in customer number order for fax records associated with AR customer and customer ship-to records. Enter the first customer number to search for. CR defaults to the first customer number on file. The display shows the customer number, customer ship-to number, description, and contact.

***1 - Vendor** Enter **1** to search in vendor order number for fax records associated with vendor and vendor ship-from records. Enter the first vendor number to search for. CR defaults to the first vendor number on file. The display shows the vendor number, vendor ship-from number, description, and contact.

***2 - Alpha** Enter **2** to search for all fax records in alpha order by company name. Enter one or more alpha characters to begin the search. CR defaults to the first fax record on file. The display shows the company name, fax phone number, company type (C-customer or V-vendor), company number, and ship-to number.

***3 - Fax phone #** Enter **3** to search for all fax records in order by fax phone number. Enter the first fax phone number to begin the search. CR defaults to the first fax phone number on file. The display shows the fax

phone number, company name, company type (C-customer or V-vendor), company number, and ship-to or ship-from number.

***4 - Contact** Enter **4** to search for all fax records in order by contact name. Enter the first contact name to begin the search. CR defaults to the first contact name on file. The display shows the contact name, company name, company type (C-customer or V-vendor), and company number.

* In the Fax Information Entry Program, you can select multiple fax records for any of the previous search options by entering the line number or pressing CR at the selected line. This places an asterisk (*) after the line number to indicate that it has been flagged for selection. Enter the line number or press CR again to remove an asterisk. When all of your choices have been flagged, press F3 and all fax records which are flagged will be added as fax recipients.

Group Code Search

Enter all or part of a group code to begin the search. Press CR to begin the search with the first group code on file. The search window displays each group code and description. You can choose a group code by entering the line number on which it appears, or by pressing CR at the highlighted line.

In the Fax Information Entry Program, you can select multiple group codes by entering the line number or pressing CR at the selected line. This places an asterisk (*) after the line number to indicate that it has been flagged for selection. Enter the line number or press CR again to remove an asterisk. When all of your choices have been flagged, press F3 and all group codes which are flagged will be selected.

Option Code Search

Enter the one-character code to begin the search. CR begins the search with the first fax option code on file. The search window displays each option code and description. You can choose an option code by entering the line number on which it appears, or by pressing CR at the highlighted line.

In the Fax Information Entry Program, you can select multiple option codes by entering the line number or pressing CR at the selected line. This places an asterisk (*) after the line number to indicate that it has been flagged for selection. Enter the line number or press CR again to remove an asterisk. When all of your choices have been flagged, press F3 and all option codes which are flagged will be selected.

Vendor Number Search

Enter all or part of a vendor number to begin the search. CR begins the search with the first vendor number on file. The search window displays each vendor number and name. You can choose a vendor number by entering the line number on which it appears, or by pressing CR at the highlighted line.

5. Time

In the Fax Information Entry Program, if you do not indicate AM or PM when entering time fields, the default is AM unless you enter 12. An entry of 12 always defaults to 12 noon (p.m.). You can enter an abbreviated entry for the time. For example, you can enter **3P** for 3:00 p.m. or **830** for 8:30 a.m. You can enter times using either a military or standard format. If you enter military

time, the system converts it to standard format. In the Fax System Queue Inquiry Program, military time is always used. For example, if you enter **3P** it converts to 15:00.

APPENDIX B: Glossary of Terms

BATCH - Each fax is assigned to a batch number. A batch may contain from 1 to 9999 fax recipients. The batch consists of a global header for all recipients in the batch, and a line item to designate each recipient of the fax.

BRANCH - Branches may be referred to as stores or profit centers. The length of the branch code is two digits (01-99, user defined). Branches are set up through the SM branch F/M program. Each fax directory record is assigned to a branch, and the fax directory search is delimited by branch.

BROADCAST - When more than one fax recipient is included in a batch, transmission of the batch is referred to as a broadcast fax.

CLASS - The fax directory class is a feature that provides an easy method to categorize fax records for preparing and sending fax requests. The length of the class code is 3 characters. For example, all customers can be assigned to a specific class by sales region. Class and assign that class to their fax records. This would allow you to easily select all customers in that region to receive a fax you are preparing by selecting that class code.

COVER PAGE - The fax cover page is a feature that allows you to design as many different fax cover pages as you require. The length of the cover page code is 4 characters. You may select one fax cover page to include with each fax request in a batch, or you can select a different cover page for each fax recipient in a batch. When you design the cover page, you may include text, expanded text, graphics files, text files and bars. You may also select to imbed data fields on the cover pages to identify the sender, recipient, preparation date, transmission time and date, etc.

DIALING PREFIX - There are two dialing prefixes used in the Faxlink system. In static control F/M you can designate a prefix necessary for dialing out on your phone system. For example, if you must dial a 9 to get a dial tone, the prefix 9, would be entered in static control F/M. When you enter the fax phone number in fax directory F/M and fax information entry, you must enter any necessary prefix for long distance dialing.

DIALING SUFFIX - In static control F/M you can designate how any suffix necessary for dialing out on your phone system is to be used. For example, if you must enter a billing code after dialing any phone number, you would designate that the suffix is used for all calls. When you enter a fax request in the fax information entry program, you may enter any necessary suffix for dialing out. The flag in static control F/M designates how the suffix is used.

DOTS PER INCH (dpi) - The dots per inch defines the resolution for virtual dimensions of a fax sheet. Normal fax resolution is 100 dpi vertical by 200 dpi horizontal. Also see fine mode.

FAX - THE TERM FAX IS SLANG FOR FACSIMILE. FAX ACTUALLY REFERS TO A COLLECTION OF TECHNOLOGIES TO FIRST SCAN A PAPER DOCUMENT AND THEN CONVERTS THE DIGITAL IMAGE TO ANALOG FORM. THE FAX MACHINE THEN DIALS AND COMMUNICATES THE DATA TO A REMOTE FAX MACHINE.

The FaxLink System uses processes to emulate the fax technologies. When you prepare a fax, it is converted to an image format (fax file) that is suitable for transmitting to a fax machine. When the fax request is complete, it is submitted to the fax system queue. The fax server process controls the fax system queue for transmitting the fax to the designated recipient.

FAX ADMINISTRATOR - The fax administrator is the person responsible for maintaining the FaxLink system.

FAX DIRECTORY RECORD - The fax directory record is a record in a database that contains the necessary information for preparing a fax request, such as the local or long distance fax number, the company name, address, and contact. you can assign up to 5 different classes to a fax record to facilitate preparation of fax requests for a designated fax class.

FAX OPTION - Fax options allow you to define additional parameters for preparing and sending fax requests. The length of the option code is 1 character. The option may define such things as sending the fax in fine mode or placing the fax on a preprinted form when it is being prepared. You may assign up to 10 option codes to a batch of fax requests at the time you are preparing them. Fax options can be set up for the preparation or sending of the fax, and generally allow you to implement a command.

FINE MODE - This term is used to define the resolution of a fax sheet. Normal fax resolution is 100 dpi vertical by 200 dpi horizontal. Fine mode is double the normal vertical resolution (or 200 dpi).

GLOBAL MEMO - The global memo is a note that you can enter for all fax recipients in a batch. The memo can contain up to 999 lines with 75 characters per line. The memo prints on the fax cover after all cover page elements.

GROUP - The fax group is a feature that provides an easy method of combining multiple fax records for preparing and sending fax requests. The length of the group code is 3 characters. Each group code may contain up to 40 members. A member may be any fax directory record, only customer associated fax directory records, only vendor associated fax records, a fax class or another fax group. For example, you may define a separate class code for each sales region. You may then define a group to combine all class codes for all sales regions. This allows you to easily select all customers in all regions to receive a fax you are preparing by selecting that group code.

PREPRINTED FORMS - A preprinted form is any form that contains text and blank space where you enter information. For example, an invoice and a purchase order are preprinted forms. In FaxLink you can define a preprinted form as a fax file, and then place a fax request on the form.

RECIPIENT - A fax recipient is the destination or receiver of the fax.

RECIPIENT MEMO - The recipient memo is a note that you can enter for an individual fax recipient in a batch. The memo can contain up to 999 lines with 75 characters per line. The memo prints on the fax cover for the designated fax recipient after all cover page elements and any global memo.

RETRY SCHEDULE - The retry schedule is used when a fax request cannot be sent because of a transmission error, such as a busy signal or out of paper condition at the receiving fax. The retry schedule defines the number of attempts that should be made, and the time interval between attempts. The retry schedule can be changed in Fax System Queue Inquiry (FLI610).

ROUTER - The router is a daemon process used in the FaxLink System for processing faxes after they have been received. A routing rule file determines how the inbound faxes are to be processed.

SERVER - The server is a daemon process used in the FaxLink System which interfaces to the fax modems. It monitors the fax modem waiting for calls to arrive, and monitors a control file that is waiting for outbound fax requests to appear. You can define up to 20 fax servers for processing. The length of each defined server code is up to 3 characters in the range of 0 to 127.

SYSTEM QUEUE - The FaxLink System uses a system queue to hold faxes that are ready for transmission. The fax server processes each fax request based on their designated transmission time and priority. If an attempt to send a fax is unsuccessful, the retry schedule is invoked and the server will make another attempt at the next time specified. Fax requests are removed from the queue after they have been successfully transmitted, and a one-line summary is written to the audit log.

TRACE LOG - The server and router processes write trace logs of activity from start up to reading the configuration file that determines how they will act. As fax processing occurs, this activity is also written to the logs. The server logs are named Faxlog.n where n is the number of the server. The router log is named routelog. The logs are cleared each time the server or router is restarted. If the servers and router are run for long periods of time, the fax administrator may need to clear them manually.

TSI (Transmitting Identification) - The TSI is information sent from one fax machine to another subscriber that identifies the sender of the fax. The TSI is a T.30 protocol for fax machines as part of the standards set by the CCITT.

TTI (Transmitting Tag Information) - An information block found on the top of a fax that usually contains information such as company name, date and time, and the originating fax number. Within FAXFX this information is also known as the "id_strip."

APPENDIX C: Sample Reports

PROGRAM	NAME	PAGE
FLR710	FAX DIRECTORY LISTING	C-3

Sample Reports

DATE: 03/05/02 DEMO COMPANY FLR710 PAGE: 1

USER: SSI T0g Fax Directory Listing TIME: 10:28 AM

ALPHA FIRST TO LAST

L

FAX PHONE NUMBER D CONTACT DESCRIPTION
=====

098-225-8542 N James Wilson Barnes Machinery & Equipment
Cust: C104 Voice: 404-223-0934
Address: 18 South Dixon Ave.
Atlanta, GA 30302

555-1212 N Sam Johnson Deluxe Equipment Warehouse
Cust: C101 Voice: 404-331-0988
Address: 3320 Jonesboro Blvd.
Douglasville, GA 30301

098-555-4022 Y Jerry Madden Flags, Flags, Flags, Inc.
Cust: C121 Voice: 512-887-8833
Ship-to: S121 Address: 23 IH-10 Exit 49
San Antonio, TX 75032

800-555-1212 Y Samuel Jackson General Industrial MFG
Vend: V100 Voice: 205-321-0934

Ship-fr: S100 Address: 2235 S. Rolling Rock Circle
Birmingham, AL. 35223

404-334-9836 N Michael Brooks Georgia Shipping Equip. Co.
Vend: V110 Voice: 404-334-9833
Address: 3376 Washington Ave. S.E.
Atlanta, GA. 30302

222-1111 N Controller Grande Hotel, Acctg Dept.
Vend: V112 Voice: 404-921-1111
Address: 71 Hwy 29 South
Lilburn, GA 30321

Sample Reports

DATE: 03/05/02 DEMO COMPANY FLR710 PAGE: 2

USER: SSI T0g Fax Directory Listing TIME: 10:28 AM

L

FAX PHONE NUMBER D CONTACT DESCRIPTION
=====

404-588-1289 N Jon Skaggs Lightning Courier Service
Vend: V107 Voice: 404-587-1199
Address: 99 Eagle Landing Drive
Marietta, GA 30067

214-947-0345 Y Jerry Bales Maloney's Metal Products Co.
Cust: C106 Voice: 214-947-0345
Address: 2928 Hwy 64 South
Dallas, TX 75223

212-313-4114 Y Jack "Mr. Widget" Smith Nat'l Widget Dealers Assoc.
Voice: 1-212-313-4124
Address: 1 Widget Way
Suite 0
Dallas, TX 11111

222-2222 N Morgan King Office Products International
Vend: V103 Voice: 404-874-9334

Address: 45121 North Decatur Ave.

Atlanta, GA 30339

404-973-1001

Y Howard Roark

Roark Architectural, Inc.

Cust: C102 Voice: 404-971-0093

Address: 12471 Carson Blve.

Acworth, GA 30063

LD=LONG DISTANCE

FAX RECORDS: 11

END OF REPORT

