



Mail Server User Guide

Infor Distribution A+ Version Number 10.02.01

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The Mail Server module provides the ability to e-mail any report or listing printed through the Report Options Screen and any document that can be faxed, allowing more rapid and paperless communication between departments, customers, and vendors. Forms, reports, and listings created in Infor Distribution A+ modules are converted into an electronic mail (e-mail) format and sent over the Internet to customers, vendors, warehouses, and Distribution A+ users. This module provides high and low priority for transmissions, and the ability to compress attachments, send multiple attachments, and password protect documents.

Mail Server also provides the ability to export reports. The PC File Export process provides the ability for standard reports to be exported to a file that can be downloaded to a PC and opened with standard PC programs. Through the Report Options Screen, choosing to export provides the additional screens with the selection criterion to complete the export of a standard report.

This guide also contains information about Application Mail - internal messaging that sends and receives messages between registered Distribution A+ users.

Interfaces

The Mail Server module interfaces with the following modules:

- Accounts Receivable
- Bid & Quote
- Inventory Accounting
- Order Entry
- Purchasing
- Workflow Management

Accounts Receivable

The interface with Accounts Receivable allows you to maintain e-mail information for customers through Customer/Ship to Master Maintenance (MENU ARFILE). A customer or a ship-to address can

be assigned up to three e-mail addresses and be set up to automatically receive the following documents via e-mail:

- Invoices
- Acknowledgements
- Demand A/R Statements
- Overdue Notices
- Customer Quotes

The following types of e-mail addresses can be assigned to a customer. Attachment compression and password protection can be activated for each address.

- Default e-mail address. If this is the only address defined, all mail to that customer will be sent to this address.
- Accounts Payable e-mail address. Invoices, A/R Demand Statements, and Overdue Notices will be sent to this address. If this address is not defined, Invoices, A/R Demand Statements, and Overdue Notices will be sent to the default e-mail address.
- Purchasing e-mail address. Acknowledgements and Customer Quotes will be sent to this address. If this address is not defined, Acknowledgements and Customer Quotes will be sent to the default e-mail address.

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. Refer to Cross Applications User Guide for information about the Report Options Screen.

Bid & Quote

The interface with Bid & Quote allows Customer Quotes and Vendor RFQs to be e-mailed automatically to a customer and a vendor respectively, if that customer and vendor are set up with e-mail addresses in the Customer/Ship to Master Maintenance (MENU ARFILE) or the Vendors Maintenance (MENU POFILE).

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. Refer to Cross Applications User Guide for information about the Report Options Screen.

Inventory Accounting

The interface with Inventory Accounting allows you to maintain e-mail information for warehouses through Warehouse Numbers Maintenance (MENU IAFILE). A warehouse can be assigned 1 or 2 e-mail addresses and be set up to automatically receive the following documents:

- Pick Lists
- Pack Lists

The following types of e-mail addresses can be defined for a warehouse:

- Default e-mail address. If this is the only address defined, all mail to that warehouse will be sent to this address.
- Warehouse e-mail address. Pick Lists and Pack Lists will be sent to this address. If this address is not defined, Pick Lists and Pack Lists will be sent to the default e-mail address.

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. Refer to Cross Applications User Guide for information about the Report Options Screen.

Order Entry

The interface with Order Entry allows Invoices and Acknowledgments to be e-mailed automatically to a customer and a ship-to address respectively, if that customer and ship-to are set up with e-mail addresses in the Customer/Ship to Master Maintenance (MENU ARFILE). Pick Lists and Pack Lists can be e-mailed automatically to a warehouse, if the warehouse is set up with e-mail address in the Warehouse Numbers Maintenance (MENU IAFILE).

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. Refer to Cross Applications User Guide for information about the Report Options Screen.

Purchasing

The interface with Purchasing allows you to maintain e-mail information for vendors through Vendors Maintenance (MENU POFILE). A vendor can be assigned one or two e-mail addresses and be set up to automatically receive the following documents via e-mail:

- Purchase Orders
- Vendor RFQs

The following types of e-mail addresses can be assigned to a vendor. Attachment compression and password protection can be activated for each address.

- Default e-mail address. If this is the only address defined, all mail to that vendor will be sent to this address.
- Customer Service e-mail address. Purchase Orders and Vendor RFQs will be sent to this address. If this address is not defined, Purchase Orders and Vendor RFQs will be sent to the default e-mail address.

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. Refer to Cross Applications User Guide for information about the Report Options Screen.

Workflow Management

The interface with Workflow Management allows alert messages to be sent to users via e-mail rather than Application Mail.

To receive alert messages via e-mail, a user must have a valid e-mail address in the **User Email Address** field in Register A+ User IDs (MENU XACFIG). You can then define the user as either an internal or an external recipient on the User Workflow Options Screen. Internal recipients can have alert messages e-mailed to them if there is a **Y** in the **Copy to Email** field. External recipients will receive alert messages via e-mail by default.

Documents That Can Be E-mailed

With the Mail Server module, any report or listing that currently prints from the Report Options Screen as well as any document that can be faxed can be e-mailed. Options are available to set up individual vendors and customers to automatically be e-mailed one, some, or all of the following documents:

- Acknowledgments
- Customer Quotes
- Demand A/R Statements
- Invoices
- Overdue Notices
- Purchase Orders
- Vendor RFQs
- Workflow Alert Messages

Additional options can be set to e-mail Pick Lists and Pack Lists to warehouses within your company.

Interfaces for Exporting Standard Reports

With the Mail Server module, any report or listing that currently prints from the Report Options Screen can be exported to a PC file. Standard PC programs for exporting to include Microsoft Word, Microsoft Excel, WordPad, and Notepad. There are a select group of reports that have been further modified to allow the export of data to an Excel TSV (tab-separated values) or CSV (comma separated values) type file. See the Reports That Support Excel CSV/TSV Exports section of the *CHAPTER 12: PC File Export Options* for that specific list.

Features of Mail Server

Mail Server consists of several processes and applications that together provide the functionality needed to e-mail documents from other Distribution A+ modules.

Component Elements

Mail Server	Mail Server adds the capability to store vendor, customer, personal, and internal e-mail addresses to existing Distribution A+ modules. The option to e-mail reports and documents (such as Invoices and Purchase Orders) has been added to existing fax and report capabilities. Each report or document is sent as an attachment to an e-mail message.
Mail Server Broker	The Mail Server Broker is an integral part of Mail Server. The Mail Server Broker is a System i process that monitors the Mail Server files for outgoing e-mail. The Broker writes each e-mail, with its attachments, to a rich text file in a directory that is shared with the Mail Gateway Express workstation. An inquiry option allows users to review the status of outgoing messages being passed to the shared directory.
Mail Gateway Express	<p>Mail Gateway Express is a server product that functions as an intermediary between Distribution A+ modules and one or more Internet Service Providers (ISPs). Mail Gateway Express monitors the Distribution A+ host shared drive, searching for control and attachment files representing outgoing messages generated by Mail Server. Each control file is processed to extract all elements of the outgoing message (such as e-mail address, message text, and attachments). The outgoing message is then assembled from the extracted elements and dispatched to an ISP.</p> <p>The final result of the send operation for each outgoing message is recorded in an e-mail status table. Additionally, Mail Gateway Express maintains a number of activity log files that capture all server activities, including maintenance.</p>
Mail Server Inquiry	Inquiries may be made on Mail Server Requests from the Mail Server Main Menu (MENU MSMAIN). This inquiry provides the user ID of the sender, the TO, CC, and BCC address, the message priority, the date sent, and the status of the request. From this option you can resend, delete, display, or save a request.

Mail Server Options	<p>Mail Server is designed to maintain its files independently. It will automatically purge outgoing e-mail history files based on a user defined period.</p> <p>The Number of days to keep Mail Server requests field is maintained in the Mail Server Options (MENU MSFILE). When the Mail Server Broker is started, all e-mail files older than the user defined period are purged, unless that file has been saved through Mail Server Inquiry (MENU MSMAIN). Files marked sav must be manually deleted through the same inquiry.</p>
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Contact Directories

Mail Server allows you to create and store directories of e-mail addresses for customer, vendor, and personal contacts, as well as distribution groups. In addition, the system maintains a list of internal e-mail addresses for ease when selecting intra-company addresses when e-mailing documents to other Distribution A+ users.

Customer Contacts Maintenance	<p>Contacts can be defined for customers and ship-to addresses through Customer Contacts Maintenance (MENU MSFILE) or Customer/Ship To Master Maintenance (MENU ARFILE). Using Customer Contacts Maintenance, contact information includes name, job title, department, phone and fax numbers, email address and a preferred contact method. The Contact ID is associated with a specific customer and/or customer/ship-to and documents sent using email to that Contact may optionally be compressed and password protected.</p>
Vendor E-mail Contacts Maintenance	<p>E-mail addresses can be defined for vendors through Vendor Email Contacts Maintenance (MENU MSFILE) or Vendors Maintenance (MENU POFILE). The e-mail address is associated with a specific vendor contact and documents sent to that address may optionally be compressed and password protected.</p>
User E-mail Contacts Maintenance	<p>Each user can define additional e-mail addresses for their personal use through User Email Contacts Maintenance (MENU MSFILE). Each e-mail address in this list is associated with a specific user and documents sent to that address may optionally be compressed and password protected.</p>

Distribution Groups Maintenance	E-mail addresses can be assigned to distribution groups through Distribution Group Assignments Maintenance (MENU MSFILE). The e-mail addresses are associated with a distribution group code defined through Distribution Groups Maintenance (MENU MSFILE). When the distribution group code is keyed in the TO Address field on the Email Options Screen (p. B-2), the document will be sent to all the contact addresses assigned to that code.
Internal Email Contacts	Distribution A+ maintains a list of internal e-mail contacts. When a user is registered through Register A+ User IDs (MENU XACFIG), an e-mail address can be specified for that user. The user addresses defined here become the internal e-mail list, accessible from the Email Options Screen when you enter a question mark in the TO Address field. Documents sent to the user's address may optionally be compressed and password protected.

E-mail Process

When you select to e-mail a document, the following process takes place:

1. The Email Options Screen appears with the following fields:

- **FROM Address**
- **TO Address**
- **TO Compress (Y,N)**
- **TO Password Protect (Y,N)**
- **Priority**
- **Attachment Name**
- **CC Address**
- **BCC Address**
- **Subject**
- **Body Text**

The **FROM Address** field allows you to select the email address for the sender and will default to the User, AR, PO, OE, BQ, or general email defaults that have been defined. The **TO Address** field is question-markable and allows you to select addresses from the customer, vendor, personal, internal, and distribution group e-mail lists.

2. If you are e-mailing a document that e-mails automatically from the option that creates it, and if the customer or vendor has e-mail information set up in the Customer/Ship-to Master File or the Vendor Master File, the e-mail address information, mailing instructions, subject, and an attachment name will default into the fields. You can override any default information.

If you are e-mailing a document that e-mails automatically through a batch process option, the Email Options Screen (p. B-2) will not appear, but the document will be e-mailed if the customer or

vendor has e-mail information set up in the Customer/Ship-to Master File or the Vendor Master File. The document will be sent to the appropriate default address.

If you are creating a document other than those that can be set up to e-mail automatically, you can select to e-mail that document on the Report Options Screen. If you select to e-mail the document, the Email Options Screen (p. B-2) will appear with all fields blank. You can key the address and mailing instructions or search for an address using the question mark feature.

3. The Mail Server Broker writes each e-mail, with its attachments, to a rich text file in a directory that is shared with the Mail Gateway Express workstation.

Mail Gateway Express monitors the Distribution A+ host shared drive, searching for control and attachment files representing outgoing messages generated by Mail Server. Each control file is processed to extract all elements of the outgoing e-mail message (such as e-mail addresses, message text, and attachments). The outgoing message is then assembled from the extracted elements and dispatched to an ISP. The final result of the send operation for each outgoing message is recorded in an e-mail status table.

4. You can check the status of Mail Server requests being sent to the shared directory by the Mail Server Broker through the Mail Server Inquiry (MENU MSMAIN). This inquiry does not show whether the e-mail was picked up and dispatched to an ISP. There are separate inquiries on the Mail Gateway Express workstation that allow the server administrator to check the status of outgoing messages.

Menus of Mail Server

This section provides a brief highlight of the menus that comprise Mail Server and their functions.

MENU MSMAIN

This menu allows you to:

- Start the Mail Server Broker
- Stop the Mail Server Broker
- Inquire into Mail Server requests
- Access the Mail Server File Maintenance Menu

MENU MSFILE

This menu allows you to maintain and list the following:

- Customer Contacts
- Vendor Contacts
- User Contacts
- Distribution Groups
- Distribution Group Assignments

- Mail Server Options

MENU EXMAIN

This menu allows you to:

- Create PC File Export Options
- Start Debug File Export
- End Debug File Export
- PC File Export Inquiry

The Mail Server Broker is started through the Start Mail Server Broker option on the Mail Server Main Menu (MENU MSMAIN). This option starts the Mail Server Broker, allowing Mail Server requests to be processed. If the Mail Server Broker has been stopped, this option will restart the Broker.

The Mail Server Broker is a process that writes each outgoing e-mail, with attachments, to a rich text file in a directory that is shared with the Mail Gateway Express workstation. Mail Gateway Express then picks up the outgoing mail from the Distribution A+ host shared drive and dispatches it to an ISP.

Outgoing e-mail cannot be sent to the shared directory if the Broker is not running. In addition, starting the Broker purges the Mail Server files of all requests older than the number of days you set in the Mail Server Options (MENU MSFILE).

When To Run This Option

If the Mail Server System Options (MENU MSFILE) are not set up to start the Mail Server Broker automatically when Distribution A+ is started, use this option to start the Broker. If the Broker has been manually stopped or needs to be restarted for any reason, select this option to restart it.

Start Mail Server Broker

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Start Mail Server Broker Screen	Used to confirm that you want to start the Mail Server Broker.
Start Mail Server Broker Confirmation Screen	Confirms that the Mail Server Broker has been started.

Start Mail Server Broker Screen



This screen appears after selecting option [1](#)- Start Mail Server Broker from MENU MSMAIN. Use this screen to confirm that you want to start the Mail Server Broker.

Start Mail Server Broker Screen Fields and Function Keys

Field/Function Key	Description
F3=Cancel	Press F3=CANCEL to cancel this option and return to MENU MSMAIN.
Enter	Press ENTER to confirm that you want to start the Mail Server Broker. The Start Mail Server Broker Confirmation Screen (p. 2-3) will appear.

Start Mail Server Broker Confirmation Screen



This screen appears after pressing [ENTER](#) on the Start Mail Server Broker Screen (p. 2-2). This screen confirms that the Mail Server Broker has been started.

Start Mail Server Broker Confirmation Screen Fields and Function Keys

Field/Function Key	Description
Enter	Press ENTER to return to MENU MSMAIN.

The Mail Server Broker is stopped through the Stop Mail Server Broker option on the Mail Server Main Menu (MENU MSMAIN). This option stops the Mail Server Broker and prevents Mail Server requests from being processed. Requests will not be processed until the Mail Server Broker is restarted through either Start Mail Server Broker (MENU MSMAIN) or the next time you start Distribution A+, if the Broker is set to start with Distribution A+ through Mail Server Options (MENU MSFILE).

Mail Server jobs executing when you stop the Mail Server Broker will complete normally.

When To Run This Option

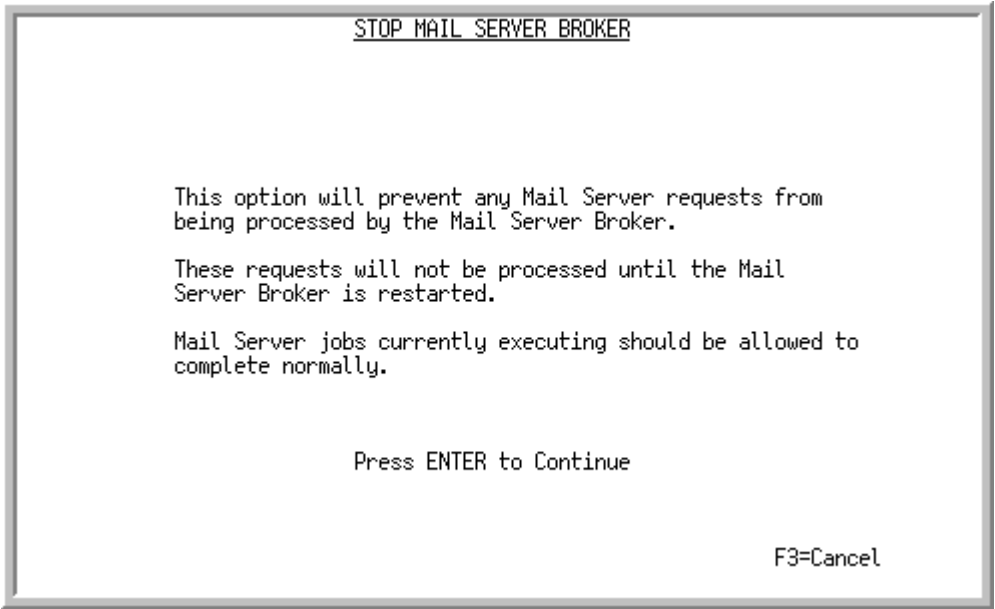
The Mail Server Broker must be stopped before you run the dedicated portion of Day-End processing.

Stop Mail Server Broker

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Stop Mail Server Broker Screen	Used to confirm that you want to stop the Mail Server Broker.
Stop Mail Server Broker Confirmation Screen	Confirms that the Mail Server Broker has been stopped.

Stop Mail Server Broker Screen



This screen appears after selecting option [2](#) - Stop Mail Server Broker from MENU MSMAIN. Use this screen to confirm that you want to stop the Mail Server Broker.

Stop Mail Server Broker Screen Fields and Function Keys

Field/Function Key	Description
F3=Cancel	Press F3=CANCEL to cancel this option and return to MENU MSMAIN.
Enter	Press ENTER to confirm that you want to stop the Mail Server Broker. The Stop Mail Server Broker Confirmation Screen (p. 3-3) appears.

Stop Mail Server Broker Confirmation Screen



This screen appears after pressing [ENTER](#) on the Stop Mail Server Broker Screen (p. 3-2). This screen confirms that the Mail Server Broker has been stopped.

Stop Mail Server Broker Confirmation Screen Fields and Function Keys

Field/Function Key	Description
Enter	Press ENTER to return to MENU MSMAIN.

You can inquire into the status of Mail Server requests through the Mail Server Inquiry option on the Mail Server Main Menu (MENU MSMAIN). A Mail Server request is the body text of the e-mail message and its attachment. From the inquiry, you can re-send, delete, display, or save requests that have been placed in a shared directory by the Mail Server Broker for e-mail transmission by Mail Gateway Express.

Mail Server Inquiry

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Mail Server Inquiry Screen	Displays Mail Server request information.

Mail Server Inquiry Screen

MAIL SERVER INQUIRYRESTART NEEDED

User ID	TO Address	P	Sent Dt	Sts
*ALERT	john.bellows@infor.com	H	10/01/10	PND
Order Placed	on Hold			
*ALERT	brian.nolan@gmail.com	H	10/01/10	PND
Order Placed	on Hold			
*ALERT	john.bellows@infor.com	H	9/30/10	PND
Order Placed	on Hold			
*ALERT	brian.nolan@gmail.com	H	9/30/10	PND
Order Placed	on Hold			
*ALERT	brian.nolan@gmail.com	H	9/30/10	PND
Order Placed	on Hold			
*ALERT	john.bellows@infor.com	H	9/30/10	PND
Order Placed	on Hold			

More...

Actions

Limits:

1=Resend

4=Delete

5=Display

9=Save

User ID:

TO Address:

Subject:

Sent Date: From: To:

F2=CC Address F3=Exit F5=Refresh F6=Start Broker

This screen appears after selecting option **10** - Mail Server Inquiry (MENU MSMAIN). This screen lists Mail Server requests by user ID and displays the address to which the request was sent, the date it was sent, and its status.

You may limit the inquiry by entering specific parameters in the Limits section of the screen and pressing **F5=REFRESH** to refresh the display. You may also perform several actions on the displayed requests.

Mail Server Inquiry Screen Field and Function Keys

Field/Function Key	Description
(Status)	<p>The status of the Mail Server Broker. The status may be:</p> <ul style="list-style-type: none">ACTIVE: The Mail Server Broker is started and processing requests.RESTART NEEDED: The Mail Server Broker has been stopped. Requests will not be processed until you start the Broker. <p>You can stop and start the Broker from this screen or from options on MENU MSMAIN.</p> <p>If the Mail Server Broker status is ACTIVE and you press F6=START BROKER, the Stop Mail Server Broker Screen (p. 3-2) will appear.</p> <p>If the Mail Server Broker status is RESTART NEEDED and you press F6=START BROKER, the Start Mail Server Broker Screen (p. 2-2) will appear.</p> <p>Display</p>

Mail Server Inquiry Screen Field and Function Keys

Field/Function Key	Description
(Action)	<p>Actions may only be performed on completed or saved requests. Refer to the Sts column for more information about a request's status.</p> <p>Key 1 to resend the request. The Email Options Screen (p. B-2) will appear. Resending a request creates a new request.</p> <p>Key 4 to delete the request. All requests older than the number of days you set in the Mail Server Options (MENU MSFILE) will be automatically deleted when the Mail Server Broker starts. However, saved requests will not be purged automatically. Saved requests must be deleted manually using this action.</p> <p>Key 5 to display the request. The Email Options Screen (p. B-2) will appear.</p> <p>Key 9 to save the request. When you no longer need to keep this request on file, you will have to delete it manually. It will not be purged automatically when the Mail Server Broker starts.</p> <p>(N 1) Optional</p>
User ID	<p>The user ID of the user who sent the request.</p> <p>Display</p>
(Address)	<p>The address to which the document was e-mailed. This field displays the TO Address, CC Address, or BCC Address depending on your selection with the F2=CC ADDRESS / F2=BCC ADDRESS / F2=TO ADDRESS toggle key.</p> <p>Display</p>
P	<p>The priority assigned to the request when it was e-mailed. The priority may be:</p> <ul style="list-style-type: none"> • L - low • H - high <p>Display</p>
Sent Dt	<p>The date the Mail Server request was originally sent. If a request is re-sent, the Sent Dt will not change. Resending a request creates a new request with the resend sent date</p> <p><i>Valid Values:</i> Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG -Option 4), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIILE).</p> <p>Display</p>

Mail Server Inquiry Screen Field and Function Keys

Field/Function Key	Description
Sts	<p>The status of the request. A request may be:</p> <ul style="list-style-type: none"> • LDG - loading • PND - pending • CMP - complete • SAV - saved <p>The status CMP only reflects the progress of the request to the shared directory. CMP does not mean the message was successfully delivered via the Internet.</p> <p>Display</p>
Limits: User ID	<p>Key all or part of the user ID whose e-mail activity you want to inquire on. You can key any registered user ID defined through Register A+ User IDs (MENU XACFIG). E-mail messages sent by users that match the limiting criteria you entered will display.</p> <p>(A 10) Optional</p>
Limits: TO Address	<p>Key all or part of the e-mail address you want to inquire on. E-mail messages with addresses that match the limiting criteria you entered will display</p> <p>(A 50) Optional</p>
Limits: Subject	<p>Key all or part of the subject of the e-mail you want to inquire on. E-mail addresses with subjects that match the limiting criteria you entered will display.</p> <p>(A 50) Optional</p>
Limits: Sent Date	<p>Key the date or range of dates that you want to inquire on. E-mail with a Sent Date that matches the criteria you entered will display. Refer to From and To Ranges in the Cross Applications User Guide for the rules for entering ranges.</p> <p>Requests will only be available for inquiry for the number of days set up in the Mail Server System Options (MENU MSFILE). Therefore, if you only save requests for 10 days and you enter a range of 30 days, you will only see requests up to 10 days old and any requests older than 10 days which you have saved through this option, but not yet deleted.</p> <p><i>Valid Values:</i> Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIILE).</p> <p>(2 @ N 6,0) Optional</p>

Mail Server Inquiry Screen Field and Function Keys

Field/Function Key	Description
F2=CC Address/BCC Address/TO Address	<p>This key is used as a toggle to display either the CC address, the BCC address, or the TO address in the Address column on this screen.</p> <p>Press F2=CC ADDRESS to display the CC address in the Address column.</p> <p>Press F2=BCC ADDRESS to display BCC address in the Address column.</p> <p>Press F2=TO ADDRESS to display the TO address in the Address column.</p>
F3=Exit	<p>Press F3=EXIT to exit the Mail Server Inquiry and return to MENU MSMAIN.</p>
F5=Refresh	<p>After you have entered criteria in the Limits fields, press F5=REFRESH to refresh the information displayed on this screen.</p>
F6=Stop Broker/Start Broker	<p>Depending on the status of the Mail Server Broker, this key may be used to start or stop the Broker from this screen.</p> <p>If the Mail Server Broker status is Active, pressing F6=STOP BROKER will stop the Mail Server Broker. The Stop Mail Server Broker Screen (p. 3-2) will appear.</p> <p>If the Mail Server Broker status is Restart Needed, pressing F6=START BROKER will start the Mail Server Broker. The Start Mail Server Broker Screen (p. 2-2) will appear.</p>

You can define contacts for customers and ship-to addresses through the Customer Contacts Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE).

Use this option to add, change, or delete customer contacts. Contact information set up through this option includes name, job title, department, phone and fax numbers, email address, and a preferred contact method. The **Contact ID** is associated with a specific customer and/or customer/ship-to and documents sent using email to that contact may optionally be compressed and password protected.

A stand-alone contact can also be defined through this menu option. Once defined, you can later link multiple customers and/or customer/ship-to addresses to that contact, allowing for a contact to be shared across entities. An inquiry is also available for customer employees, which are stand-alone contacts where the Employer Reference is a given company and customer, and maintenance will be allowed for the contacts even if they are stand-alone and do not have a corresponding association with an Distribution A+ customer.

NOTE: Contacts for customers and ship-to addresses can also be defined through the Customer/Ship-To Master Maintenance option on the Accounts Receivable Maintenance Menu (MENU ARFILE).

Customer Contacts Maintenance

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Customer Contact Maintenance Selection Screen	Used to add, change, or delete customer contacts.
Customer/Ship To Email Address Selection Screen	Used to select a customer email address.

Title	Purpose
Contact Search Screen	Used to locate a contact.
Customer Employees Screen	Use to inquire on customer employees, which are stand-alone contacts where the Employer Reference is a given company and customer.
Customer Contact Maintenance Screen	Use to view customer contact information and optionally define a Contact Use .
Contact Maintenance General Information Screen	Use to enter general contact information and contact methods.
Contact Maintenance General Information Detail Screen	Use to review general information regarding the contact.
Contact Where Used Screen	Use to confirm that the contact you selected from the Contact Search Screen (p. 5-13) is the one that you wanted for the customer or ship-to, or to review all the customer/ship-to's that use this contact ID.
Contact Maintenance Address Information Screen	Use to enter contact address information.

Customer Contact Maintenance Selection Screen

CUSTOMER CONTACT MAINTENANCE	
Function:	.. (A,C,D)
Company?	01,
Customer:	.....
Ship To:	.....
Find:	.....
City:	..... St/Prov:
Contact ID:	.....
F3=Exit F5=Ship To Search F4=Cust Contact List F6=Contact List F7=Cust Employees	

This screen appears after selecting option **1** - Customer Contacts Maintenance from MENU MSFILE. This screen can also be accessed by pressing **F11=CONTACTS** on the Customer/Ship To File Maintenance Screen (MENU ARFILE), or **F11=CONTACT MAINT** on the Customer/Ship To Email Address Selection Screen (p. 5-8).

Use this screen to add, change, or delete customer contacts.

You can link a contact to a customer or customer/ship-to by keying a previously defined contact in the **Contact ID** field, or you can create a stand-alone contact by leaving the **Contact ID** field blank. If you leave the **Contact ID** field blank, this will first create the stand-alone contact and then you can assign this contact to the customer or customer/ship-to in one operation. Creating stand-alone contacts provides for the ability for a contact to be shared across entities.

Customer Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Key A to add a customer contact. Key C to change a customer contact. Key D to delete a customer contact. (A 1) Required

Customer Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Company	<p>This field displays only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE).</p> <p>Key the number of the company with which this customer is associated. This is the company number put in the customer record when the customer was added through Customer/Ship-to Master Maintenance (MENU ARFILE).</p> <p><i>Default Value:</i> The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE).</p> <p><i>Valid Values:</i> A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(N 2,0) Required</p>
Customer	<p>Key the customer number of the contact you want to add, change, or delete. Multiple contacts may be assigned to a customer.</p> <p>If you do not know the customer number, use the Find, City, and St/Prov fields to activate the Customer Search feature. Refer to the Accounts Receivable User Guide for more information about the Customer/Ship-To Search - Customer Search Screen.</p> <p><i>Valid Values:</i> Any customer number defined through Customer/Ship-to Master Maintenance (MENU ARFILE).</p> <p>(N 10,0) Required</p>
Ship To	<p>Key the ship-to number of the contact you want to add, change, or delete. Multiple contacts may be assigned to the same ship-to address.</p> <p>If you do not know the ship-to number for the customer, key the customer number in the Customer field and press F5=SHIP TO SEARCH to view a list of ship-to addresses for that customer. The Customer/Ship-To Search - Ship-To Search Screen will appear. Refer to the Accounts Receivable User Guide for more information about the Customer/Ship-To Search - Ship-To Search Screen.</p> <p><i>Valid Values:</i> Any ship-to number defined for the customer through Customer/Ship-to Master Maintenance (MENU ARFILE).</p> <p>(N 7,0) Optional</p>

Customer Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Find	<p>Use this field alone or with the City and St/Prov fields to search for a customer by name, phone number, and zip/postal code.</p> <p>Key one or more of the following, separated by one blank space:</p> <ul style="list-style-type: none">• up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order.• up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters.• up to 5 characters (the first 5) of the customer's zip/postal code. <p>(A 40) Optional</p>
City	<p>Use this field alone or with the Find and St/Prov fields to search for a customer in a particular city.</p> <p>Key up to 8 characters of the customer's city.</p> <p>(A 8) Optional</p>
St/Prov	<p>Use this field with one or both of the Find and City fields to search for a customer in a particular state/province.</p> <p>Key up to 10 characters (the first 10) of the state or province code.</p> <p>(A 10) Optional</p>

Customer Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	<p>A contact is a unique identifier used by the CRM system that can be assigned to one or more customers or customer/ship-to addresses. You can use this field to assign a contact to a customer or customer/ship-to address, or define a stand-alone contact (that can then be assigned to multiple customers and customer/ship-to addresses), allowing for a contact to be shared across entities.</p> <p>To assign a previously defined contact to a customer or customer/ship-to address, key the Contact ID. When you press ENTER, the Customer Contact Maintenance Screen (p. 5-18) will appear, where you will key the Contact Use for the contact. If you do not recall the Contact ID, you can search for a contact by pressing F6=CONTACT LIST to access the Contact Search Screen (p. 5-13), which will display a list of existing contacts.</p> <p>To create a stand-alone contact through this menu option, leave this field blank. This will first create the stand-alone contact and then you can assign this contact to the customer or customer/ship-to in one operation. When you press ENTER, the Contact Maintenance General Information Screen (p. 5-20) will appear and the Contact ID field will be automatically filled in with the next sequential ID number.</p> <hr/> <p>NOTE: You can have multiple contacts for one customer or customer/ship-to, but they all will have a unique Contact ID.</p> <hr/> <p><i>Valid Values:</i> A valid contact ID defined through this menu option by initially leaving this field blank to create a stand-alone contact.</p> <p>(N 10,0) Required</p>
F3=Exit	<p>Press F3=EXIT to exit this option and return to MENU MSFILE.</p> <p>If this screen was accessed from the Customer/Ship To Email Address Selection Screen (p. 5-8), via F11=CONTACT MAINT, pressing F3=EXIT will return you to that screen.</p>
F4=Cust Contact List	<p>Press F4=CUST CONTACT LIST to access a list of existing customer or ship-to email contacts. The Customer/Ship To Email Address Selection Screen (p. 5-8) will appear.</p> <p>If this screen was accessed from the Customer/Ship To Email Address Selection Screen (p. 5-8), via F11=CONTACT MAINT, pressing F4=CUST CONTACT LIST will return you to that screen.</p>
F5=Ship To Search	<p>After entering a customer number in the Customer field, press F5=SHIP TO SEARCH to use the ship-to search. The Customer/Ship-To Search - Ship-To Search Screen will appear. This screen allows you to search for and select a ship-to address for the customer you are maintaining. Refer to the Accounts Receivable User Guide for more information about this screen.</p>
F6=Contact List	<p>Press F6=CONTACT LIST to search for a contact. The Contact Search Screen (p. 5-13) will appear.</p>

Customer Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
F7=Cust Employees	<p>After entering a company number, press F7=CUST EMPLOYEES to access a list of existing stand-alone contacts that have a given company and customer as the Employer Reference (i.e., that are employees of a given customer). The Customer Employees Screen (p. 5-15) will appear.</p> <p>If you leave the Customer field blank and press F7=CUST EMPLOYEES, the Customer Employees Screen (p. 5-15) will display all stand-alone contacts.</p> <p>If you key a value in the Customer field and press F7=CUST EMPLOYEES, the Customer Employees Screen (p. 5-15) will display customer employees for that customer only.</p>
Enter	<p>Press ENTER to save your entries.</p> <p>If you keyed A or D in the Function field and entered a Contact ID, the Customer Contact Maintenance Screen (p. 5-18) will appear.</p> <p>If you keyed C in the Function field and entered a Contact ID, or if you left the Contact ID field blank to create a stand-alone contact, the Contact Maintenance General Information Screen (p. 5-20) will appear.</p>

Customer/Ship To Email Address Selection Screen

CUSTOMER/SHIP TO EMAIL ADDRESS SELECTION	
Co/Customer?	01, / 10, Bon Secour School Department
Ship To:	.....
Find:	.....
City:	..... St/Prov:
<u>Sl</u>	<u>Contact Name</u> <u>Email Address</u>
1	John Peters John.Peters@BonSecour
Last	
Limits:	Contact Name:
	Email Address:
Sel: -	
F2=Phone No F5=Ship To Search F11=Contact Maint F12=Return	

This screen appears after you:

- press **F4=CUST CONTACT LIST** on the Customer Contact Maintenance Selection Screen (p. 5-3)
- press **F5=CUSTOMER** on the Personal Email Address Selection Screen (p. 7-4), if you accessed that screen from the Email Options Screen (p. B-2)
- key a **?** in the **TO Address** field on the Email Options Screen (p. B-2)
- key a **?** in the bill-to or ship-to **Contact** field on the Order Header Screen in Enter, Change & Ship Orders

Use this screen to select a customer email address.

If you enter a customer number on the Customer Contact Maintenance Selection Screen (p. 5-3), this screen will display all the email contacts for that customer. If you enter a customer number and a ship-to address number on the Customer Contact Maintenance Selection Screen (p. 5-3), this screen will display all the email contacts for that customer and ship-to address.

If you key a **?** in the bill-to **Contact** field on the Order Header Screen in Enter, Change & Ship Orders, and the indicated customer has an AR customer number (with or without a ship-to number), the AR customers contacts would be displayed; otherwise, the order customers contacts will be shown.

If you key a **?** in the ship-to **Contact** field on the Order Header Screen in Enter, Change & Ship Orders, and did not enter a ship-to number for the indicated customer, the order customers contacts will be displayed since no ship-to number was used. If a ship-to number was entered, the order customers/ship-to contacts will be shown.

Customer/Ship To Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Co/Customer	<p>If you accessed this screen from the Customer Contact Maintenance Selection Screen (p. 5-3), this field displays the company and/or customer number you keyed on that screen. You can override the information displayed here to alter the list of contacts displayed.</p> <p>If you accessed this screen via F5=CUSTOMER on the Personal Email Address Selection Screen (p. 7-4), this field displays the customer number from Order Entry.</p> <p>Key the company and/or customer number whose contact list you want to display.</p> <p><i>Default Value:</i> The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE).</p> <p><i>Valid Values:</i> A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY), and any customer number defined through Customer/Ship to Master Maintenance (MENU ARFILE).</p> <p>(N 2,0 / N 10,0) Required</p>
Ship To	<p>If you accessed this screen from the Customer Contact Maintenance Selection Screen (p. 5-3), this field displays the ship-to number you keyed on that screen. You can override the information displayed here to alter the list of contacts displayed.</p> <p>If you accessed this screen via F5=CUSTOMER on the Personal Email Address Selection Screen (p. 7-4), this field displays the ship-to number from Order Entry.</p> <p>If you do not remember the ship-to number for the customer, press F5=SHIP TO SEARCH to list ship-to addresses for the customer. The Ship-To Search Screen will appear. Refer to the Cross Applications User Guide for more information about the Ship-To Search Screen and an explanation of the search feature.</p> <p>Key the ship-to number whose contact list you want to display.</p> <p><i>Valid Values:</i> Any ship-to number defined for the customer through Customer/Ship-to Master Maintenance (MENU ARFILE).</p> <p>(N 7,0) Optional</p>

Customer/Ship To Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Find	<p>Use this field alone or with the City and St/Prov fields to search for a customer by name, phone number, and zip/postal code.</p> <p>Key one or more of the following, separated by one blank space:</p> <ul style="list-style-type: none"> • up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. • up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters. • up to 5 characters (the first 5) of the customer's zip/postal code. <p>(A 40) Optional</p>
City	<p>Use this field alone or with the Find and St/Prov fields to search for a customer in a particular city.</p> <p>Key up to 8 characters of the customer's city.</p> <p>(A 8) Optional</p>
St/Prov	<p>Use this field with one or both of the Find and City fields to search for a customer in a particular state/province.</p> <p>Key up to 10 characters (the first 10) of the state or province code.</p> <p>(A 10) Optional</p>
Sl	<p>This field displays the selection number for the email address.</p> <p>Key this number in the Sel field and press ENTER to select a contact email address.</p> <p>Display</p>
Contact Name	<p>This column displays a list of contact names associated with the customer or ship-to number.</p> <p>Display</p>
Email Address/Phone Number/Fax Number	<p>This column displays the email address, phone number, or fax number of the contact. The information displayed in this column depends on your selection with the F2=PHONE NO / F2=FAX NO / F2=EMAIL ADDR toggle key.</p> <p>Display</p>
Limits: Contact Name	<p>Key all or part of a contact name and press ENTER to limit the contacts displayed on this screen to those contacts that match the limiting criteria you entered.</p> <p>(A 25) Optional</p>
Limits: Email Address	<p>Key all or part of an email address and press ENTER to limit the contacts displayed on this screen to those contacts with an email address that matches the limiting criteria you entered.</p> <p>(A 50) Optional</p>

Customer/Ship To Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Sel	<p>Key the number displayed in the SI field that corresponds to the contact you want to select.</p> <p>(N 2,0) Optional</p>
F2=Phone No/Fax No/ Email Addr	<p>The F2=PHONE NO / F2=FAX NO / F2=EMAIL ADDR function key is used as toggle to display either the contact's phone number, fax number, or email address.</p> <p>Press F2=PHONE NO to display the country access code, phone number, and extension.</p> <p>Press F2=FAX NO to display the country access code, fax number, and extension.</p> <p>Press F2=EMAIL ADDR to display the email address.</p>
F5=Ship To Search	<p>After entering a customer number in the Customer field, press F5=SHIP TO SEARCH to use the ship-to search. The Ship-To Search Screen will appear. This screen allows you to search for and select a ship-to address for the customer you are maintaining. Refer to the Cross Applications User Guide for more information about this screen and an explanation of the search feature.</p>
F11=Contact Maint	<p>The F11=CONTACT MAINT function key displays if this screen was accessed from the Order Header Screen in Enter, Change & Ship Orders.</p> <p>Press F11=CONTACT MAINT to display the Customer Contact Maintenance Selection Screen (p. 5-3), where you can add, change, or delete customer/ship-to contacts. If you make a selection on this screen and then press F11=CONTACT MAINT, the Contact ID, Company, Customer, and Ship To will be displayed on the Customer Contact Maintenance Selection Screen (p. 5-3) to allow for changes or deletion.</p> <hr/> <p>NOTE: When returning from the Customer Contact Maintenance Selection Screen (p. 5-3), this screen will be refreshed to show added, changed, or deleted contacts with email addresses.</p>
F12=Return	<p>If you accessed this screen from the Customer Contact Maintenance Selection Screen (p. 5-3), press F12=RETURN to return to that screen without making a selection.</p> <p>If you accessed this screen from the Personal Email Address Selection Screen (p. 7-4), press F12=RETURN to return to that screen without making a selection.</p> <p>If you accessed this screen from the Order Header Screen in Enter, Change & Ship Orders, after keying a ? in the bill-to or ship-to Contact field, press F12=RETURN to return to the Order Header Screen without making a selection. If you keyed a ? in both the bill-to and ship-to Contact fields, if you press F12=RETURN, this screen will be re-displayed showing the customer/ship-to contacts.</p>

Customer/Ship To Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Enter	<p>The ENTER function key serves multiple functions:</p> <ul style="list-style-type: none">• If you keyed information in the Find field, press ENTER to activate the search feature. The Customer/Ship-To Search - Customer Search Screen will appear. Refer to the Accounts Receivable User Guide for more information about the Customer/Ship-To Search - Customer Search Screen and an explanation of the search feature.• If you changed the company, customer, or ship-to number or you entered information in the Limits field, press ENTER to update the screen display.• If you entered a number in the Sel field, press ENTER to select that email address.• If you accessed this screen by pressing F4=CUST CONTACT LIST on the Customer Contact Maintenance Selection Screen (p. 5-3), you will be returned to that screen, and the contact you selected will appear in the Contact ID field.• If you accessed this screen by pressing F5=SHIP TO SEARCH on the Personal Email Address Selection Screen (p. 7-4), the Email Options Screen (p. B-2) will appear, and the email address you selected will appear in the TO Address field.

Contact Search Screen

CONTACT SEARCH		
Sl	Contact ID	Contact Name
1	1	Jane Rivers
2	2	John Peters
3	3	John Rogers

Sel: Limits: Name: Last
 Email:
 Phone:
 Fax:

F2=Email F12=Return

This screen appears after you press **F6=CONTACT LIST** on the Customer Contact Maintenance Selection Screen (p. 5-3). This screen displays existing contacts only and does not show contact customer relationships.

Use this screen to locate a contact. You can limit the contacts displayed on this screen by **Name**, **Email**, **Phone**, and **Fax**. Once you have located the contact, key the reference number for that contact in the **Sel** field and press **ENTER** to select that contact and proceed to the Contact Maintenance General Information Screen (p. 5-20).

NOTE: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- * **PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- * **PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

The **F7=PAGE DOWN** and **F8=PAGE UP** will be listed as valid function keys where they are available.

Contact Search Screen Fields and Function Keys

Field/Function Key	Description
Sl	This is the reference number assigned to each contact displayed on this screen. Key this number in the Sel field to select that contact and press ENTER to proceed to the Contact Maintenance General Information Detail Screen (p. 5-25). Display

Contact Search Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	This field displays the ID of the contact previously defined through this menu option. Display
Contact Name/Email Address/Phone Number/Fax Number	This field may be toggled with the F2=EMAIL / F2=PHONE / F2=FX / F2=NAME function key to display the contact name (previously defined through this option), contact's email address, contact's phone number, or contact's fax number. Display
Sel	Use this field to select one of the contacts displayed on this screen to view general information for that contact. Key the number displayed in the SI field that corresponds to the contact you want to select, and press ENTER to proceed to the Contact Maintenance General Information Detail Screen (p. 5-25). (N 2,0) Optional
Limits: Name	Use this field to limit the display of the contacts shown on this screen to only those contacts that match the name entered. (A 50) Optional
Limits: Email	Use this field to limit the display of the contacts shown on this screen to only those contacts that match the email address entered. (A 50) Optional
Limits: Phone	Use this field to limit the display of the contacts shown on this screen to only those contacts that match the phone number entered. (A 50) Optional
Limits: Fax	Use this field to limit the display of the contacts shown on this screen to only those contacts that match the fax number entered. (A 50) Optional
F2=Email	Press F2=EMAIL / F2=PHONE / F2=FX / F2=NAME to toggle between showing the contact's name, email address, phone number, or fax number.
F12=Return	Press F12=RETURN to return to the Customer Contact Maintenance Selection Screen (p. 5-3) without making a selection.
Enter	After entering a contact in the Sel field, press ENTER to proceed to the Contact Maintenance General Information Detail Screen (p. 5-25).

Customer Employees Screen

CUSTOMER EMPLOYEES		
Employer Ref: Co?/Customer? 01, / 0000000000,		
Sl	Contact ID	Contact Name
1	1	John Peters
Sel: , , , Limits:		Name: Last
		Email:
F2=Email		F12=Return

This screen appears after you press **F7=CUST EMPLOYEES** on the Customer Contact Maintenance Selection Screen (p. 5-3).

This screen provides an inquiry of customer employees, which are stand-alone contacts where the Employer Reference is a given company and customer. If the **Customer** field was left blank on the Customer Contact Maintenance Selection Screen (p. 5-3), this screen will display all stand-alone contacts. If a value was keyed in the **Customer** field on the Customer Contact Maintenance Selection Screen (p. 5-3), this screen will display customer employees for that customer only.

This screen also allows you to select an existing stand-alone contact to edit/maintain, even if no association exists with a customer in Distribution A+ (i.e., no related CONTC record because the stand-alone contact has not been associated with a customer contact).

You can limit the contacts displayed on this screen by contact **Name** or **Email** address. Once you have located the contact, you can key the reference number for that contact in the **Sel** field and press **ENTER** to access the Contact Maintenance General Information Screen (p. 5-20), where you can edit the information on the contact.

NOTE: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- * **PAGE DOWN** or **SHIFT-ROLL FWD** to display the next screen
- * **PAGE UP** or **SHIFT-ROLL BACK** to display the previous screen.

Customer Employees Screen Fields and Function Keys

Field/Function Key	Description
Employer Ref	<p>The company and customer number, if any, selected on the Customer Contact Maintenance Selection Screen (p. 5-3).</p> <p>You have the option to change the company (if multi-companies are being used) and customer, to re-display the screen with the employees for the new company and customer entered.</p> <p><i>Valid Values:</i> A valid company number defined through Company Name Maintenance (MENU XAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY), and any customer number defined through Customer/Ship to Master Maintenance (MENU ARFIL).</p> <p>(N 2,0 / N 10,0) Optional</p>
SI	<p>This is the reference number assigned to each contact displayed on this screen. Key this number in the Sel field to select that contact and press ENTER to proceed to the Contact Maintenance General Information Screen (p. 5-20).</p> <p>Display</p>
Contact ID	<p>This field displays the ID of the stand-alone contact.</p> <p>Display</p>
Contact Name / Email Address	<p>This field displays either the name of the stand-alone contact, or the email address of the contact, as toggled with the F2=EMAIL / F2=NAME.</p> <p>Display</p>
Sel	<p>Use this field to select one of the contacts displayed on this screen to view or edit/maintain general information for that contact.</p> <p>Key the number displayed in the SI field that corresponds to the contact you want to select, and press ENTER to proceed to the Contact Maintenance General Information Screen (p. 5-20).</p> <p>(N 2,0) Optional</p>
Limits: Name	<p>Use this field to limit the display of the contacts shown on this screen to only those contacts that match the name entered.</p> <p>(A 50) Optional</p>
Limits: Email	<p>Use this field to limit the display of the contacts shown on this screen to only those contacts that match the email address entered.</p> <p>(A 50) Optional</p>
F2=Email	<p>Press F2=EMAIL / F2=NAME to toggle between showing the contact's name or email address.</p>
F12=Return	<p>Press F12=RETURN to return to the Customer Contact Maintenance Selection Screen (p. 5-3) without making a selection.</p>

Customer Employees Screen Fields and Function Keys

Field/Function Key	Description
Enter	After entering a contact in the Sel field, press ENTER to proceed to the Contact Maintenance General Information Screen (p. 5-20).

Customer Contact Maintenance Screen

CUSTOMER CONTACT MAINTENANCE Add

Customer: 1 / 10 Bon Secour School Department

Email Address: jdrivers@financialmanagement

Contact: Jane Rivers

Phone Number: 401 823.7632 9873

Fax Number: 401 832.7639

Contact Use: -

F12=Return

This screen appears after you press **ENTER** on the Customer Contact Maintenance Selection Screen (p. 5-3), if you keyed **A** or **D** in the **Function** field and entered a previously defined **Contact ID**. If you keyed **C** in the **Function** field and entered a previously defined **Contact ID**, or if you keyed **A** in the **Function** field and left the **Contact ID** field blank to create a stand-alone contact, this screen appears after you press **ENTER** on the Contact Maintenance Address Information Screen (p. 5-31).

Use this screen to optionally define a **Contact Use**. All other fields on this screen are display only.

Customer Contact Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Customer	This field displays the company and customer for which you are adding, changing or deleting a contact. Display
Email Address	This field displays the email address of the contact. Display
Contact	This field displays the name of the contact associated with the customer number and email address. Display
Phone Number	This field displays the contact's phone number, including the country access code, if any, and extension. Display

Customer Contact Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Fax Number	<p>This field displays the contact's fax number, including the country access code, if any, and extension.</p> <p>Display</p>
Contact Use	<p>This field is for future use. If you would like to categorize your contacts now, you may use this field to enter a value that defines the use of the contact. For example, you could key A if this contact would be used for Accounts Payable or P if this contact would be used for Purchasing.</p> <p>(A 1) Optional</p>
F12=Return	<p>Press F12=RETURN to return to the Customer Contact Maintenance Selection Screen (p. 5-3) without saving your entries.</p>
F24=Delete	<p>The F24=DELETE function key only displays if you selected to delete the contact.</p> <p>Press F24=DELETE to delete the contact record. You will be prompted to press F24=DELETE again to confirm deletion. The Customer Contact Maintenance Selection Screen (p. 5-3) will appear.</p>
Enter	<p>Press ENTER to confirm your entry in the Contact Use field. The Contact File (CONTC) will be updated with your changes. The Customer Contact Maintenance Selection Screen (p. 5-3) will appear.</p>

Contact Maintenance General Information Screen

```

CONTACT MAINTENANCE GENERAL INFORMATION
Contact ID:      1 John Peters
General Information:
Salutation:  Mr.
First Name:  John
Middle Name:
Last Name:   Peters
Employer Ref: Co?/Customer? 01 / 0000000010 Bon Secour School Department
Job Title:
Department:
Phone:       205-949-7411
Fax:         205-949-7413
Email:
Compress: N Password Protect: N Password:
Contact Methods:
Preferred: A E-mail: Y Bulk E-mail: Y Phone: Y Fax: Y Mail: Y
F2=Where Used      F12=Return
  
```

This screen appears after you press **ENTER** on the Customer Contact Maintenance Selection Screen (p. 5-3), if you keyed **C** in the **Function** field and entered a **Contact ID**, or if you left the **Contact ID** field blank to create a new contact. This screen also displays after selecting a contact from the Customer Employees Screen (p. 5-15).

Use this screen to enter general contact information and contact methods. You can also press **F2=WHERE USED** to view the customers and ship to's the contact has been assigned to.

Contact Maintenance General Information Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	<p>This field displays the Contact ID you entered on the Customer Contact Maintenance Selection Screen (p. 5-3), if one was entered. If you left the Contact ID field blank to create a new contact, the system automatically assigns the next sequential Contact ID number.</p> <p>Display</p>
Salutation	<p>Use this field to enter a salutation (a greeting used in a letter or other written communication, such as an email).</p> <p>Key the salutation. For example, you might key Mr. or Mrs. and the contact's name would follow.</p> <p>(A 50) Optional</p>
First Name	<p>Key the first name of the contact.</p> <p>(A 50) Optional</p>

Contact Maintenance General Information Screen Fields and Function Keys

Field/Function Key	Description
Middle Name	Key the middle name of the contact. (A 50) Optional
Last Name	Key the last name of the contact. (A 30) Required
Employer Ref Co/ Customer	<p>Use this field to link this contact to a specific customer Employer Reference as required for the ContactMaster BOD. This field is not used in Distribution A+.</p> <p>Key the company and/or customer number whose contact list you want this contact to be attached to.</p> <p><i>Default Value:</i> The company and customer number selected on the Customer Contact Maintenance Selection Screen (p. 5-3)</p> <p><i>Valid Values:</i> A valid company number defined through Company Name Maintenance (MENU XAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY) and any customer number defined through Customer/Ship to Master Maintenance (MENU ARFIL).</p> <p>(N 2,0 / N 10,0) Optional</p>
Job Title	Key the contact's job title. (A 50) Optional
Department	Key the department the contact works in. (A 50) Optional
Phone	<p>Key the contact's telephone number, which includes the following:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number • 4 position extension number <p>For example: 011 (781) 555-1212 8226</p> <p>For more information, refer to Phone and Fax Number Delimiters in the Cross Applications User Guide.</p> <p><i>Valid Values:</i> Numerals and the following symbols: - () . / (Note that blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is Y in Systems Options Maintenance (MENU XAFIL)).</p> <p>(N 3,0 / N 20,0 / N 4,0) Optional</p>

Contact Maintenance General Information Screen Fields and Function Keys

Field/Function Key	Description
Fax	<p>This field applies if FAX is installed.</p> <p>Key the contact's fax number, which includes the following:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number • 4 position extension number <p>For example: 011 (781) 555-1212 8226</p> <p><i>Valid Values:</i> Numerals and the following symbols: - () . / (Note that blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is Y in Systems Options Maintenance (MENU XAFILE)).</p> <p>(N 3,0 / N 20,0 / N 4,0) Optional</p>
Email	<p>Key an email address for the contact. Separate multiple e-mail addresses with a semi-colon.</p> <p><i>Valid Values:</i> Any operational email address or any distribution group defined through Distribution Groups Maintenance (MENU MSFILE) and assigned email addresses through Distribution Group Assignments Maintenance (MENU MSFILE).</p> <p>(A 128) Required</p>
Compress	<p>Use this field to specify whether documents sent as email attachments to this contact will be compressed.</p> <p>Key Y to compress attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to compress document attachments, the recipient must have standard data compression software or be using an email client that supports compression in order to open the attachment.</p> <hr/> <p>Key N to leave attachments sent to this contact uncompressed.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
Password Protect	<p>Use this field to specify whether documents sent as email attachments to this contact will be password protected. If you select to password protect documents, the recipient will not be able to open the attached document without the password.</p> <p>Key Y to require password protection for attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to password protect attachments, then you must also key Y in the Compress field.</p> <hr/> <p>Key N to send attachments to this contact without password protection.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>

Contact Maintenance General Information Screen Fields and Function Keys

Field/Function Key	Description
Password	<p>This field is required if you keyed Y in the Password Protect field. If you keyed N in the Password Protect field, then you must leave this field blank.</p> <p>Key a password. The contact must know the password and key it exactly as you enter it here in order to open the email attachment. Email passwords are case sensitive.</p> <p>(A 10) Required/Blank</p>
Preferred	<p>Use this field to select the preferred method of contact to be used. This value will be used in ICB as the preferred method of contact.</p> <p>Key A for any method.</p> <p>Key E for email.</p> <p>Key P for phone.</p> <p>Key F for fax.</p> <p>Key M for mail.</p> <p>(A 1) Required</p>
E-mail	<p>Use this field to select whether or not you want e-mail used as a contact method.</p> <p>Key Y to allow e-mail to be used as a contact method.</p> <p>Key N to not allow e-mail to be used as a contact method.</p> <p><i>Valid Values:</i> Y or N</p> <p>(A 1) Required</p>
Bulk E-mail	<p>Use this field to select whether or not you want bulk e-mail used as a contact method.</p> <p>Key Y to allow bulk e-mail to be used as a contact method.</p> <p>Key N to not allow bulk e-mail to be used as a contact method.</p> <p><i>Valid Values:</i> Y or N</p> <p>(A 1) Required</p>
Phone	<p>Use this field to select whether or not you want the telephone used as a contact method.</p> <p>Key Y to allow the telephone to be used as a contact method.</p> <p>Key N to not allow the telephone to be used as a contact method.</p> <p><i>Valid Values:</i> Y or N</p> <p>(A 1) Required</p>

Contact Maintenance General Information Screen Fields and Function Keys

Field/Function Key	Description
Fax	<p>Use this field to select whether or not you want Fax used as a contact method.</p> <p>Key Y to allow Fax to be used as a contact method.</p> <p>Key N to not allow Fax to be used as a contact method.</p> <p><i>Valid Values:</i> Y or N</p> <p>(A 1) Required</p>
Mail	<p>Use this field to select whether or not you want mail used as a contact method.</p> <p>Key Y to allow mail to be used as a contact method.</p> <p>Key N to not allow mail to be used as a contact method.</p> <p><i>Valid Values:</i> Y or N</p> <p>(A 1) Required</p>
F2=Where Used	<p>Press F2=WHERE USED to view the customers and ship to's the contact has been assigned to. The Contact Where Used Screen (p. 5-28) will appear.</p>
F12=Return	<p>Press F12=RETURN to return to the:</p> <ul style="list-style-type: none">• Customer Contact Maintenance Selection Screen (p. 5-3), in add mode• Customer Contact Maintenance Screen (p. 5-18), in change mode <p>Your entries will not be saved.</p>
F24=Delete	<p>The F24=DELETE function key displays in the delete mode only.</p> <p>Press F24=DELETE to delete the contact record. You will be prompted to press F24=DELETE again to confirm deletion.</p>
Enter	<p>Press ENTER to confirm your entries. The Contact Maintenance Address Information Screen (p. 5-31) will appear.</p>

Contact Maintenance General Information Detail Screen

```

CONTACT MAINTENANCE GENERAL INFORMATION

Contact ID:          1 John Peters

General Information:
Salutation:  Mr.
First Name:  John
Middle Name:
Last Name:   Peters
Employer Ref: Co/Customer: 02 / 0000000010 Pittsburgh School Department
Job Title:
Department:
Phone:       205-949-7411
Fax:         205-949-7413
Email:

Compress: N Password Protect: N Password:

Contact Methods:
Preferred: A E-mail: Y Bulk E-mail: Y Phone: Y Fax: Y Mail: Y

F2=Where Used                                F12=Return
  
```

This screen appears after you select a contact and press **ENTER** on the Contact Search Screen (p. 5-13).

Use this screen to review general information regarding the contact. All fields are display only.

You can also press **F2=WHERE USED** to view the customers and ship to's the contact has been assigned to.

Contact Maintenance General Information Detail Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	This field displays the ID and name of the contact you selected on the Contact Search Screen (p. 5-13).
Salutation	This field displays the salutation associated with the contact.
First Name	This field displays the first name of the contact.
Middle Name	This field displays the middle name of the contact.
Last Name	This field displays the last name of the contact.
Employer Ref Co/ Customer	The Employer Reference Co/Customer field links this contact to a specific customer Employer Reference as required for the ContactMaster BOD . This field is not used in Distribution A+.
Job Title	This field displays the contact's job title.

Contact Maintenance General Information Detail Screen Fields and Function Keys

Field/Function Key	Description
Department	This field displays the department the contact works in.
Phone	<p>This field displays the contact's telephone number, which includes the following:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number
Fax	<p>This field applies if FAX is installed.</p> <p>This field displays the contact's fax number, which includes the following:</p> <ul style="list-style-type: none"> • 3-character country access code • 20-character area code and telephone number
Email	This field displays the email address for the contact.
Compress	<p>This field indicates if documents sent as email attachments to this contact will be compressed.</p> <p>Y displays if attachments will be compressed when sent to this contact.</p> <p>N displays if attachments will not be compressed when sent to this contact.</p>
Password Protect	<p>This field indicates if documents sent as email attachments to this contact will be password protected.</p> <p>Y displays if a password is required for attachments sent to this contact.</p> <p>N displays if a password is not required for attachments sent to this contact.</p>
Password	This field displays the password, if one is required.
Preferred	<p>This field displays the preferred method of contact to be used. This value will be used in ICB as the preferred method of contact.</p> <p>A displays for any method.</p> <p>E displays for e-mail.</p> <p>P displays for phone.</p> <p>F displays for fax.</p> <p>M displays for mail.</p>
E-mail	<p>This field indicates if e-mail can be used as a contact method.</p> <p>Y displays if e-mail will be allowed as a contact method.</p> <p>N displays if e-mail will not be allowed as a contact method.</p>
Bulk E-mail	<p>This field indicates if bulk e-mail can be used as a contact method.</p> <p>Y displays if bulk e-mail will be allowed as a contact method.</p> <p>N displays if bulk e-mail will not be allowed as a contact method.</p>

Contact Maintenance General Information Detail Screen Fields and Function Keys

Field/Function Key	Description
Phone	This field indicates if the telephone can be used as a contact method. Y displays if the telephone will be allowed as a contact method. N displays if the telephone will not be allowed as a contact method.
Fax	This field indicates if Fax can be used as a contact method. Y displays if Fax will be allowed as a contact method. N displays if Fax will not be allowed as a contact method.
Mail	This field indicates if mail can be used as a contact method. Y displays if mail will be allowed as a contact method. N displays if mail will not be allowed as a contact method.
F2=Where Used	Press F2=WHERE USED to view the customers and ship to's the contact has been assigned to. The Contact Where Used Screen (p. 5-28) will appear.
F12=Return	Press F12=RETURN to return to the Contact Search Screen (p. 5-13).
Enter	Press ENTER to update the Contact File - Stand-Alone (XACONTC) with your changes. The Customer Contact Maintenance Selection Screen (p. 5-3) will appear.

Contact Where Used Screen

CONTACT WHERE USED			
Contact ID:		2 John Peters	
SL	I	ID	Name
1	C	1/10	Bon Secour School Department
2	C	1/10/1	Bon Secour Middle School
3	C	1/10/2	Bon Secour Wilmer Cnty Schools
Selection: _ ,			Last
F12=Return			

This screen appears after you press **F2=WHERE USED** from the Contact Maintenance General Information Screen (p. 5-20), Contact Maintenance General Information Detail Screen (p. 5-25), or Contact Maintenance Address Information Screen (p. 5-31). This screen serves two purposes, depending on whether or not the **Selection** field appears on this screen. The **Selection** field appears on this screen when you access this screen by pressing **F6=CONTACT LIST** on the Customer Contact Maintenance Selection Screen (p. 5-3) and then selected a **Contact ID** from the Contact Search Screen (p. 5-13).

When the **Selection** field displays on this screen, use this screen to confirm that the contact you selected from the Contact Search Screen (p. 5-13) is the one that you wanted for the customer or ship-to. If so, and you make a selection on this screen (key a value in the **Selection** field), the system will load this customer or ship-to contact into the Customer Contact Maintenance Selection Screen (p. 5-3) and then you can key the appropriate function of **A**, **C** or **D** from that screen and press **ENTER**.

When the **Selection** field does not display on this screen, use this screen to review all the customer/ship-to's that use this contact ID. If you make a change to the general information or address information, it will affect all the customer/ship-to's displayed in this list.

NOTE: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- * **PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- * **PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

The **F7=PAGE DOWN** and **F8=PAGE UP** will be listed as valid function keys where they are available.

Contact Where Used Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	This field displays the contact ID and name. Display
SI	This is the reference number assigned to each customer or customer/ship-to displayed on this screen. Key this number in the Selection field, if it appears on this screen, and press ENTER to have the system load this customer or ship-to contact into the Customer Contact Maintenance Selection Screen (p. 5-3). Display
T	This field indicates the type of contact. C displays in this field for customer contact. Display
ID	Since the T field indicates a customer contact, this field shows the ID associated with this contact. The company number, customer number, and ship-to number, if any, displays. For example, if 1/30/2 is displayed, then 1 is the company number, 30 is the customer number, and 2 is the ship-to number. If there is no ship-to for this example, 1/30 would be displayed instead. Display
Name	This field displays the customer name or ship-to name. Display
Selection	The Selection field appears on this screen when you access this screen by pressing F6=CONTACT LIST on the Customer Contact Maintenance Selection Screen (p. 5-3) and then selected a Contact ID from the Contact Search Screen (p. 5-13). Use this field to select one of the customers or ship-to's displayed on this screen. Key the number displayed in the SI field that corresponds to the customer or ship-to you want to select, and press ENTER . The system will load this customer or ship-to contact into the Customer Contact Maintenance Selection Screen (p. 5-3) and then you can key the appropriate function of A , C or D from that screen and press ENTER . (N 2,0) Optional
F12=Return	Press F12=RETURN to return to the previous screen.

Contact Where Used Screen Fields and Function Keys

Field/Function Key	Description
Enter	<p>If the Selection field is displayed on this screen, after entering a value in the Selection field, press ENTER to confirm your entry and return to the Customer Contact Maintenance Selection Screen (p. 5-3). The system will load this customer or ship-to contact into the Customer Contact Maintenance Selection Screen (p. 5-3) and then you can key the appropriate function of A, C or D from that screen and press ENTER.</p> <p>If the Selection field is not displayed on this screen, when you press ENTER, the Contact Maintenance General Information Detail Screen (p. 5-25) will appear.</p>

Contact Maintenance Address Information Screen

CONTACT MAINTENANCE ADDRESS INFORMATION		Change
Contact ID:	1 Jane Rivers	
<u>Address Information:</u>		
Address Name:	Jane Rivers.....	
Street 1:	541 Bald Hill Road.....	
Street 2:	.....
Street 3:	.....
Street 4:	.....
City:	Warwick.....	
State/Province:	Rhode Island & Providence Plnt.....	
Zip/Postal Code:	02886-0641.....	
Country/Region:	USA.....	
Address Type:	D.....	
F2=Where Used		F12=Return

This screen appears after you press **ENTER** on the Contact Maintenance General Information Screen (p. 5-20). Use this screen to enter contact address information. You can also press **F2=WHERE USED** to view the customers and ship to's the contact has been assigned to.

NOTE: The information entered on this screen is not used in Distribution A+. The information fields entered on this screen are mappings to ICB.

Contact Maintenance Address Information Screen Fields and Function Keys

Field/Function Key	Description
Contact ID	This field displays the contact ID and name. Display
Address Name	Key the name of the company for the contact. (A 50) Optional
Street 1/ Street 2 / Street 3 / Street 4	Key the contact's street address, post office box number, or other address information except for the city, state/province, country, and zip/postal code which are specified in fields below. Only Street 1 is required. (A 50) Required/Optional
City	Key the contact's city. (A 50) Required
State/Province	Key the contact's state or province. (A 50) Required

Contact Maintenance Address Information Screen Fields and Function Keys

Field/Function Key	Description
Zip/Postal Code	Key the contact's zip or postal code. (A 50) Required
Country/Region	Key the contact's country and region. <i>Valid Values:</i> A country code defined through Country Name Maintenance (MENU ARFIL2). (A 50) Required
Address Type	This field indicates the type of address listed for the contact. Key O for office. Key H for home. <i>Valid Values:</i> O or H (A 1) Required
F2=Where Used	Press F2=WHERE USED to review all the customer/ship-to's that use the contact ID. The Contact Where Used Screen (p. 5-28) will appear.
F12=Return	Press F12=RETURN to return to the Contact Maintenance General Information Screen (p. 5-20).
F24=Delete	The F24=DELETE function key displays only in delete mode. Press F24=DELETE to delete the contact record. You will be prompted to press F24=DELETE again to confirm deletion. The Customer Contact Maintenance Selection Screen (p. 5-3) will appear.
Enter	Press ENTER to proceed to the Customer Contact Maintenance Screen (p. 5-18).

Customer Contacts Listing

Once you have set up your customer contacts, you can print a listing of them and their settings through the Customer Contacts Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Customer/Ship To Contact Listing Screen	Used to limit the contacts that print on the list according to specific criteria.

Customer/Ship To Contact Listing Screen

CUSTOMER/SHIP TO CONTACT LISTING

Company?

- .

To?

...

Customer:

.....

To:

.....

Ship To:

.....

To:

.....

F3=Cancel

This screen appears after you select option 11 - Customer Contacts Listing (MENU MSFILE). Use this screen to limit the contacts that print on the list according to specific criteria.

Refer to the Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Customer/Ship To Contact Listing Screen Fields and Function Keys

Field/Function Key	Description
Company	<p>This field displays only if the Multi Company field is set to Y in System Options Maintenance (MENU XAFILE).</p> <p>Leave this field blank to print customer/ship to contacts for all companies.</p> <p>Key the company or range of companies for which customer email contacts will print on the report.</p> <p><i>Valid Values:</i> A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ N 2) Optional</p>

Customer/Ship To Contact Listing Screen Fields and Function Keys

Field/Function Key	Description
Customer	<p>Key the customer number or range of customer numbers for which customer email contacts will print.</p> <p>Leave this field blank to print customer contacts for all customers.</p> <p><i>Valid Values:</i> Any customer defined through Customer/Ship to Master Maintenance (MENU ARFILE).</p> <p>(2 @ N 10) Optional</p>
Ship-to	<p>Key the ship-to number or range of ship-to numbers for which contacts will print.</p> <p>Leave this field blank to print customer email contacts for all ship-to numbers.</p> <p><i>Valid Values:</i> Any ship-to number defined through Customer/Ship-to Master Maintenance (MENU ARFILE).</p> <p>2 @ N 7 Optional</p>
F3=Cancel	<p>Press F3=CANCEL to cancel this option and return to MENU MSFILE.</p>
Enter	<p>Press ENTER to confirm your selections. The Report Options Screen will appear.</p> <p>Refer to the Cross Applications User Guide for information about this screen.</p>

Customer Contact Listing

MS836C	03/10/11	15:25:42	CUSTOMER CONTACT LISTING				BM/APDEMO	PAGE: 1
All Companies			All Customers		All Ship To's			
Contact / Email Address	Cntry	Phone	Ext	Cntry	Fax	Ext	Contact ID	
Co: 01 Customer: 10	Bon Secour School Department	011 205.949.7411	4321	011	205.949.7413	1234	2	
John Peters								
john.peters@bonsecourschools								
Compress: N Password Protect: N	011 205.949.7412		8765	011	205.949.7413	5678	3	
John Rogers								
john.rogers@bonsecourschools								
Compress: N Password Protect: N	401 823.7632		9873	401	832.7639	0000	1	
Jane Rivers								
jrivers@financialmanagement								
Compress: N Password Protect: N								
Co: 01 Customer: 10	Bon Secour School Department	011 205.949.7411	4321	011	205.949.7413	1234	2	
John Peters								
john.peters@bonsecourschools								
Compress: N Password Protect: N								
Co: 01 Customer: 10	Bon Secour School Department	011 205.949.7411	4321	011	205.949.7413	1234	2	
John Peters								
john.peters@bonsecourschools								
Compress: N Password Protect: N								
Co: 01 Customer: 100	Financial Management Services	401 823.7632	9873	401	832.7639	0000	1	
Jane Rivers								
jrivers@financialmanagement								
Compress: N Password Protect: N								

This listing prints following your selections on the Customer/Ship To Contact Listing Screen (p. 5-34) and the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints customer email contact information for each company, customer, and/or ship-to number or range of numbers specified on the Customer/Ship To Contact Listing Screen (p. 5-34).

Customer Contact Listing Fields

Report/Listing Fields	Description
(Header Information)	The header information on this list duplicates the From/To ranges you entered on the Customer/Ship To Contact Listing Screen (p. 5-34). For a detailed description of those fields, refer to that screen.
Contact/Email Address	This field prints the contact name and the email address for that contact.
Cntry/Phone/Ext	These fields print the telephone information for the email contact, including the country access code and extension, if any.
Cntry/Fax/Ext	These fields print the fax information for the email contact, including the country access code and extension, if any.
Contact ID	This field prints the unique identifier (ID) of the contact, which is used by the CRM system and which is assigned to one or more customers or customer/ship-to addresses.

Vendor e-mail contacts are defined through the Vendor Email Contacts option on the Mail Server File Maintenance Menu (MENU MSFILE). This option allows you to add, change, or delete vendor contacts from your e-mail directory.

Vendor Email Contacts

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Vendor Contact Maintenance Selection Screen	Used to add, change, or delete vendor contacts.
Vendor Email Address Selection Screen	Used to select a vendor e-mail address.
Vendor Contact Maintenance Screen	Used to provide the contact name, telephone and fax numbers, and e-mail instructions.

Vendor Contact Maintenance Selection Screen

VENDOR CONTACT MAINTENANCE

Function: _ (A,C,D)

Vendor No:

Find:

City:

Email Address:

F3=Exit F4=List

This screen appears after selecting option **2** -Vendor Email Contacts from MENU MSFILE or press **F11=EMAIL CONTACTS** on the Vendor Master Maintenance Selection Screen (MENU POFILE). Use this screen to add, change, or delete vendor contacts.

Vendor Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Key A to add a vendor contact. Key C to change a vendor contact. Key D to delete a vendor contact. (A 1) Required
Vendor No	Key the vendor number of the contact whose e-mail address you want to add, change, or delete. If you do not know the vendor number, use the Find and City fields to activate the Vendor Search feature. Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature. <i>Valid Values:</i> Any vendor number defined through Vendor Master Maintenance (MENU POFILE). (A 6) Required

Vendor Contact Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Find	<p>Use this field alone or with the City field to search for a vendor by name.</p> <p>Key up to 10 characters (the first 10) of one or more words in the vendor's name. Key the words in any order and separate each word with one blank space.</p> <p>Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature.</p> <p>(A 40) Optional</p>
City	<p>Use this field with the Find field to search for a vendor in a particular city.</p> <p>Key up to 8 characters (the first 8) of the vendor's city.</p> <p>Refer to the for more information about the Vendor Search Screen and an explanation of the search feature.</p> <p>(A 8) Optional</p>
Email Address	<p>Key the e-mail address of the contact you are adding, changing, or deleting. Separate multiple e-mail addresses with a semi-colon.</p> <p>You can access a list of existing vendor e-mail contacts by pressing F4=LIST. The Vendor Email Address Selection Screen (p. 6-4) will appear.</p> <p>(A 128) Required</p>
F3=Exit	Press F3=EXIT to exit this option and return to MENU MSFILE.
F4=List	<p>The F4=LIST function key serves two functions:</p> <ul style="list-style-type: none"> • If you keyed information in the Find field, press F4=LIST to activate the search feature. The Vendor Search Screen will appear. Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature. • Press F4=LIST to access a list of existing vendor e-mail contacts. The Vendor Email Address Selection Screen (p. 6-4) will appear.
Enter	Press ENTER to confirm your entries. The Vendor Contact Maintenance Screen (p. 6-7) will appear.

Vendor Email Address Selection Screen

VENDOR EMAIL ADDRESS SELECTION		
Vendor:	IC1000 LITTLE ITALY RESTAURANT SUPPLY	
Find:	.....
City:	.....
<u>Sl</u>	<u>Contact Name</u>	<u>Email Address</u>
1	Luigi Bornelli	lbornelli@littleitaly.restaurant
		_____ Last
Limits:	Contact Name:	.....
	Email Address:	.....
Sel: -		
		F2=Phone No F12=Return

This screen appears after you press **F4=LIST** on the Vendor Contact Maintenance Selection Screen (p. 6-2). This screen also appears if you press **F6=VENDOR** on the Personal Email Address Selection Screen (p. 7-4), if you accessed that screen from the Email Options Screen (p. B-2). Use this screen to select a vendor e-mail address.

If you enter a vendor number on the Vendor Contact Maintenance Selection Screen (p. 6-2), this screen will display all the e-mail contacts for that vendor.

Vendor Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Vendor No	<p>This field displays the vendor number you entered on the Vendor Contact Maintenance Selection Screen (p. 6-2). You can override the vendor number in this field to alter the list of contacts displayed.</p> <p>Key the vendor number of the vendor whose list of contacts you want to view.</p> <p>If you do not know the vendor number, use the Find and City fields to activate the Vendor Search feature.</p> <p><i>Valid Values:</i> Any vendor number defined through Vendor Master Maintenance (MENU POFILE).</p> <p>(A 6) Required</p>

Vendor Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Find	<p>Use this field alone or with the City field to search for a vendor by name.</p> <p>Key up to 10 characters (the first 10) of one or more words in the vendor's name. Key the words in any order and separate each word with one blank space.</p> <p>Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature.</p> <p>(A 40) Optional</p>
City	<p>Use this field with the Find field to search for a vendor in a particular city.</p> <p>Key up to 8 characters (the first 8) of the vendor's city.</p> <p>Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature.</p> <p>(A 8) Optional</p>
Sl	<p>The selection number for the e-mail address. Key this number in the Sel field and press ENTER to select a vendor contact e-mail address.</p> <p>Display</p>
Contact Name	<p>This column displays a list of contact names associated with the vendor number.</p> <p>Display</p>
Email Address/Phone Number/Fax Number	<p>This column displays the e-mail address, phone number, or fax number of the contact. The information displayed in this column depends on your selection with the F2=PHONE NO / F2=FX NO / F2=EMAIL ADDR toggle key.</p> <p>Display</p>
Limits: Contact Name	<p>Key all or part of a contact name to limit the contacts that display for this vendor on this screen to those contacts that match the limit criteria.</p> <p>(A 25) Optional</p>
Limits: Email Address	<p>Key all or part of a contact name or e-mail address to limit the contacts that display for this vendor on this screen to those contacts with an e-mail address that matches the limit criteria.</p> <p>(A 50) Optional</p>
Sel	<p>Key the number displayed in the Sl field that corresponds to the contact you want to select.</p> <p>(N 2,0) Optional</p>

Vendor Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
F2=Phone No/Fax No/ Email Addr	<p>This key is used as a toggle to display the contact's phone number, fax number, or e-mail address.</p> <p>Press F2=PHONE NO to display the country access code, phone number, and extension</p> <p>Press F2=FAX NO to display the country access code, fax number, and extension.</p> <p>Press F2=EMAIL ADDR to display the e-mail address.</p>
F12=Return	<p>If you accessed this screen from the Vendor Contact Maintenance Selection Screen (p. 6-2), press F12=RETURN to return to that screen without making a selection.</p> <p>If you accessed this screen from the Personal Email Address Selection Screen (p. 7-4), press F12=RETURN to return to that screen without making a selection.</p>
Enter	<p>The ENTER function key serves multiple functions:</p> <ul style="list-style-type: none">• If you keyed information in the Find field, press ENTER to activate the search feature. The Vendor Search Screen will appear. Refer to the Cross Applications User Guide for more information about the Vendor Search Screen and an explanation of the search feature.• If you changed the vendor number or you entered information in the Limits field, press ENTER to update the screen display.• If you keyed a number in the Sel field, press ENTER to select that e-mail address.• If you accessed this screen by pressing F4=LIST on the Vendor Contact Maintenance Selection Screen (p. 6-2), you will be returned to that screen and the e-mail address you selected will appear in the Email Address field.• If you accessed this screen by pressing F6=VENDOR on the Personal Email Address Selection Screen (p. 7-4), the Email Options Screen (p. B-2) will appear and the e-mail address you selected will appear in the TO Address field.

Vendor Contact Maintenance Screen

```

VENDOR CONTACT MAINTENANCE  ADD

Vendor:      IC1000      LITTLE ITALY RESTAURANT SUPPLY
Email Address: lbornelli@littleitaly.restaurant

Contact:      Luigi Bornelli .....
Phone Number: 39..6-857-9663 .....
Fax Number:   39..6-857-9239 .....
Compress:     N (Y,N)
Password Protect: N (Y,N) Password: .....

F12=Return
  
```

TECHNICAL NOTE: This shared screen displays from program MS830FM and screen name MAINT1.

This screen appears after you press **ENTER** on the Vendor Contact Maintenance Selection Screen (p. 6-2). Use this screen to provide the contact name, telephone and fax numbers, and e-mail instructions.

Vendor Contact Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Contact	Key the name of the contact associated with the vendor number and e-mail address. (A 30) Required
Phone Number	Key the phone number of the vendor contact, including the country access code, if any, and extension. (N 3,0 / N 20,0 / N 4,0) Optional
Fax Number	Key the fax number of the vendor contact, including the country access code, if any, and extension. (N 3,0 / N 20,0 / N 4,0) Optional

Vendor Contact Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Compress	<p>Use this field to specify whether documents sent as e-mail attachments to this contact will be compressed.</p> <p>Key Y to compress attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to compress the document attachments, the recipient must have standard data compression software or be using an e-mail client that supports compression in order to open the attachment.</p> <hr/> <p>Key N to leave attachments sent to this contact uncompressed.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
Password Protect	<p>Use this field to specify whether documents sent as e-mail attachments to this contact will be password protected. If you select to password protect documents, the recipient will not be able to open the e-mail without the password.</p> <p>Key Y to require password protection for attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to password protect attachments, then you must also key Y in the Compress field.</p> <hr/> <p>Key N to send attachments to this contact without password protection.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
Password	<p>This field is required if you keyed Y in the Password Protect field. If you keyed N in the Password Protect field, then you must leave this field blank.</p> <p>Key a password. The recipient must know the password and key it exactly as you enter it here in order to open the e-mail attachment. E-mail passwords are case sensitive.</p> <p>(A 10) Required/Blank</p>
F12=Return	<p>Press F12=RETURN to return to the Vendor Contact Maintenance Selection Screen (p. 6-2) without saving your entries.</p>
F24=Delete	<p>The F24=DELETE function key displays only if you selected to delete the contact. Press F24=DELETE to delete the contact. The Vendor Contact Maintenance Selection Screen (p. 6-2) will appear.</p>
Enter	<p>Press ENTER to save your entries. The Vendor Contact Maintenance Selection Screen (p. 6-2) will appear.</p>

Vendor Email Contacts Listing

Once you have set up your vendor email contacts, you can print a listing of them and their settings through the Vendor Email Contacts Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Vendor Contact Listing Screen	Used to limit the contacts that print on the list according to specific criteria.

Vendor Contact Listing Screen

VENDOR CONTACT LISTING

Vendor:

-

To:

.

F3=Cancel

This screen appears after you select option 12 - Vendor Email Contacts Listing (MENU MSFILE). Use this screen to limit the contacts that print on the list according to specific criteria.

Refer to the Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Vendor Contact Listing Screen Fields and Function Keys

Field/Function Key	Description
Vendor	<p>Key the vendor number or range of vendor numbers for which vendor e-mail contacts will print.</p> <p>Leave this field blank to print e-mail contacts for all vendors.</p> <p><i>Valid Values:</i> Any vendor number defined through Vendor Master Maintenance (MENU POFILE).</p> <p>(2 @ A 6) Optional</p>
F3=Cancel	<p>Press F3=CANCEL to cancel this option and return to MENU MSFILE.</p>
Enter	<p>Press ENTER to confirm your selections. The Report Options Screen will appear. Refer to the Cross Applications User Guide for information about this screen.</p>

Vendor Contact Listing

MS836V	01/14/11	9:28:38	VENDOR CONTACT LISTING					A0/APDEMO	PAGE: 1
All Vendors									
Contact / Email Address	Cntry	Phone	Ext	Cntry	Fax	Ext			

Vendor: IC1000 LITTLE ITALY RESTAURANT SUPPLY									
Luigi Bornelli	39	6-857-9663	0000	39	6-857-9239	0000			
lbornelli@littleitaly.restaurant									
Compress: N Password Protect: N Password:									
Vendor: IC5000 SASKATCHEWAN PRODUCTS									
Marc Dunderdale		519-114-8885	0000		519-115-8889	0000			
marc.dunderdale@saskatchewan.products									
Compress: N Password Protect: N Password:									
Vendor: IC6000 LE FRANCAIS WINERY									
Ava Sevres	33	56-744-3366	0000	33	56-744-3369	0000			
ava.sevres@lefrancais.winery									
Compress: N Password Protect: N Password:									

This report prints following your selections on the Vendor Contact Listing Screen (p. 6-10)] and the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints vendor e-mail contact information for each vendor or range of vendors specified on the Vendor Contact Listing Screen (p. 6-10).

Vendor Contact Listing Fields

Report/Listing Fields	Description
(Header Information)	The header information on this report duplicates the From/To ranges you entered on the Vendor Contact Listing Screen (p. 6-10). For a detailed description of those fields, refer to that screen.
Contact/Email Address	This field prints the contact name and the e-mail address for that contact.
Cty/Phone/Extn	These fields print the telephone information for the e-mail contact, including the country access code and extension, if any.
Cty/Fax/Extn	These fields print the fax information for the e-mail contact, including the country access code and extension, if any.

User e-mail contacts are defined through User Email Contacts Maintenance (MENU MSFILE). This option allows you to add, change, or delete contacts from your personal e-mail directory.

User Email Contacts

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
User Contact Maintenance Selection Screen	Used to add, change, or delete user contacts.
Personal Email Address Selection Screen	Used to select a user e-mail address.
Internal Email Address Selection Screen	Use this screen to select an internal e-mail address registered Distribution A+ users.
User Contact Maintenance Screen	Used to enter or change the contact name, telephone and fax numbers, and e-mail instructions.

User Contact Maintenance Selection Screen

USER CONTACT MAINTENANCE

Function: _ (A,C,D)

User ID: APDEMO....

Email Address:

.....

F3=Exit F4=List

This screen appears after selecting option **3** - User Email Contacts from MENU MSFILE. Use this screen to add, change, or delete user contacts.

User Contact maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Key A to add a user contact. Key C to change a user contact. Key D to delete a user contact. (A 1) Required
User ID	This field specifies the User ID for which you will be adding, changing, or deleting e-mail contacts. <i>Default Value:</i> The user ID of the user that signed on to Distribution A+. <i>Valid Values:</i> Any user ID defined through Register A+ User IDs (MENU XACIFG). The ability to change an e-mail contact for a user ID other than your own is based on the Master User Authority field in Authority Profile Maintenance (MENU XASCTY). (A 10) Required
Email Address	Key the e-mail address of the user contact you are adding, changing, or deleting. Separate multiple e-mail addresses with a semi-colon. You can access a list of existing personal e-mail contacts by pressing F4=LIST . The Personal Email Address Selection Screen (p. 7-4) will appear. (A 128) Required

User Contact maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
F3=Exit	Press F3=EXIT to exit this option and return to MENU MSFILE.
F4=List	Press F4=LIST to access a list of existing user e-mail contacts associated with the user ID in the User ID field. The Personal Email Address Selection Screen (p. 7-4) will appear.
Enter	Press ENTER to save your entries. The User Contact Maintenance Screen (p. 7-9) will appear.

Personal Email Address Selection Screen

```

      PERSONAL EMAIL ADDRESS SELECTION

User: APDEMO      APLUS Demo User

Sl Contact Name      Email Address
1 APDEMO User for demo      apdemo_user@acofficesupply.com

_____ Last

Limits:  Contact Name: .....
        Email Address: .....

Sel: _ ,

F2=Phone No   F4=Internal  F5=Customer  F6=Vendor  F9=Dist Grp  F12=Return

```

This screen appears after you:

- press **F4=LIST** on the User Contact Maintenance Selection Screen (p. 7-2)
- key a question mark in the **Email Address** field on the Distribution Group Email Address Selection Screen (p. 9-4)
- key a question mark in the **CC Address** field or **BCC Address** field on the Email Options Screen (p. B-2)

Use this screen to select a user e-mail address.

Personal Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
User	The user ID and user name whose personal e-mail list is displayed. Display
Sl	The selection number for the e-mail address. Key this number in the Sel field to select an e-mail address. Display
Contact Name	This column displays a list of contact names associated with the user ID. Display

Personal Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Email Address/Phone Number/Fax Number	<p>This column displays the e-mail address, phone number, or fax number of the contact. The information displayed in this column depends on your selection with the F2=PHONE NO / F2=FAX NO / F2=EMAIL ADDR toggle key.</p> <p>Display</p>
Limits: Contact Name	<p>Key all or part of a contact name to limit the contacts that display for this user ID on this screen to those contacts that match the limit criteria.</p> <p>(A 25) Optional</p>
Limits: Email Address	<p>Key all or part of an e-mail address to limit the contacts that display for this user ID on this screen to those contacts with an e-mail address that match the limit criteria.</p> <p>(A 25 / A 50) Optional</p>
Sel	<p>Key the number displayed in the SI field that corresponds to the contact you want to select.</p> <p>(N 2,0) Optional</p>
F2=Phone No/Fax No/Email Addr	<p>This key is used as a toggle to display either the contact's phone number, fax number, or e-mail address.</p> <p>Press F2=PHONE NUMBER to display the country access code, phone number, and extension.</p> <p>Press F2=FAX NO to display the country access code, fax number, and extension.</p> <p>Press F2=EMAIL ADDR to display the e-mail address.</p>
F4=Internal	<p>The F4=INTERNAL function key displays only if you accessed this screen from the Email Options Screen (p. B-2) or left the User ID field blank on the User Contact Maintenance Selection Screen (p. 7-2).</p> <p>Press F4=INTERNAL to access the Internal Email Address Selection Screen (p. 7-7).</p>
F5=Customer	<p>The F5=CUSTOMER function key displays only if you accessed this screen from the Email Options Screen (p. B-2), or left the User ID field blank on the User Contact Maintenance Selection Screen (p. 7-2).</p> <p>Press F5=CUSTOMER to access the Customer/Ship To Email Address Selection Screen (p. 5-8).</p>
F6=Vendor	<p>The F6=VENDOR function key displays only if you accessed this screen from the Email Options Screen (p. B-2) or left the User ID field blank on the User Contact Maintenance Selection Screen (p. 7-2).</p> <p>Press F6=VENDOR to access the Vendor Email Address Selection Screen (p. 6-4).</p>

Personal Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
F9=Dist Grp	<p>The F9=DIST GRP function key displays only if you accessed this screen from the Email Options Screen (p. B-2) or left the User ID field blank on the User Contact Maintenance Selection Screen (p. 7-2).</p> <p>Press F9=DIST GRP to access the Distribution Group Email Address Selection Screen (p. 9-4).</p>
F12=Return	<p>If you accessed this screen from the User Contact Maintenance Selection Screen (p. 7-2), press F12=RETURN to return to that screen without making a selection.</p> <p>If you accessed this screen from the Email Options Screen (p. B-2), press F12=RETURN to return to that screen without making a selection.</p>
Enter	<p>This key serves multiple functions:</p> <ul style="list-style-type: none">• If you changed the User ID or you entered information in the Limits field, press ENTER to update the screen display.• If you keyed a number in the Sel field, press ENTER to select that e-mail address.• If you accessed this screen by pressing F4=LIST on the User Contact Maintenance Selection Screen (p. 7-2), you will be returned to that screen, and the e-mail address you selected will appear in the Email Address field.• If you accessed this screen by entering a question mark in the CC Address field or BCC Address field on the Email Options Screen (p. B-2), you will be returned to that screen and the e-mail address you selected will appear.

Internal Email Address Selection Screen

INTERNAL EMAIL ADDRESS SELECTION

Sl

Contact Name

Email Address

1

APLUS Company2 All WH Aut

xxxgui@infor.com

2

APLUS Master User Securit

xxxmaster@infor.com

3

APLUS Company1 Warehouse3

xxx013@infor.com

Last

Limits:

Contact Name:

APLUS

Email Address:

.....

Sel:

_ .

F12=Return

This screen appears after you press **F4=INTERNAL** on the Personal Email Address Selection Screen (p. 7-4). This screen displays a list of e-mail addresses for registered Distribution A+ users. Use this screen to select an internal e-mail address.

Internal Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Sl	The selection number for the e-mail address. Key this number in the Sel field and press ENTER to select an internal contact e-mail address. Display
Contact Name	This column displays a list of contact names. Display
Email Address	This column displays the e-mail address of the contact. The addresses in this list are the addresses defined for the user through Register A+ User IDs (MENU XACFIG). Display
Limits: Contact Name	The Contact Name field allows you to restrict the information that displays on this screen according to specific contact criteria. Key part of a contact name to limit the contacts that display on this screen to those contacts that match the limit criteria. (A 25) Optional

Internal Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Limits: Email Address	<p>The Email Address field allows you to restrict the information that displays on this screen according to specific email criteria.</p> <p>Key part of an e-mail address to limit the contacts that display on this screen to those contacts with e-mail addresses that match the limit criteria.</p> <p>(A 50) Optional</p>
Sel	<p>Key the number displayed in the SI column that corresponds to the contact you want to select.</p> <p>(N 2,0) Required</p>
F12=Return	<p>Press F12=RETURN to return to the Personal Email Address Selection Screen (p. 7-4), without making a selection.</p>
Enter	<p>Press ENTER to confirm your selections. The Email Options Screen (p. B-2) will appear.</p>

User Contact Maintenance Screen

USER CONTACT MAINTENANCE

CHANGE

User ID: APDEMO APLUS Demo User

Email Address: apdemo_user@acofficesupply.com

Contact: APDEMO User, for, demo.....

Phone Number: 1 .. 800-343-2414.....12..

Fax Number:

Compress: N (Y,N)

Password Protect: N (Y,N) Password:

F12=Return

TECHNICAL NOTE: This shared screen displays from program MS830FM and screen name MAINT1.

This screen appears after you press **ENTER** on the User Contact Maintenance Selection Screen (p. 7-2). Use this screen to enter or change the contact name, telephone and fax numbers, and e-mail instructions.

User Contact Maintenance Screen Fields and Function Keys	
Field/Function Key	Description
Contact	Key the name of the contact associated with the e-mail address. (A 30) Required
Phone Number	Key the phone number of the user contact, including the country access code, if any, and extension. (N 3,0 / N 20,0 / N 4,0) Optional
Fax Number	Key the fax number of the user contact, including the country access code, if any, and extension. (N 3,0 / N 20,0 / N 4,0) Optional

User Contact Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Compress	<p>Use this field to specify whether documents sent as e-mail attachments to this contact will be compressed.</p> <p>Key Y to compress attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to compress document attachments, the recipient must have standard data compression software or be using an e-mail client that supports compression in order to open the attachment.</p> <hr/> <p>Key N to leave attachments sent to this contact uncompressed.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
Password Protect	<p>Use this field to specify whether documents sent as e-mail attachments sent to this contact will be password protected. If you select to password protect documents, the recipient will not be able to open the e-mail without the password.</p> <p>Key Y to require password protection for attachments sent to this contact.</p> <hr/> <p>NOTE: If you key Y to password protect attachments, then you must also key Y in the Compress field.</p> <hr/> <p>Key N if send attachments to this contact without password protection.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
Password	<p>This field is required if you keyed Y in the Password Protect field. If you keyed N in the Password Protect field, then you must leave this field blank.</p> <p>Key a password. The recipient must know the password and key it exactly as you enter it here in order to open the e-mail attachment. E-mail passwords are case sensitive.</p> <p>(A 10) Required/Blank</p>
F12=Return	Press F12=RETURN to return to the User Contact Maintenance Selection Screen (p. 7-2) without saving your entries.
F24=Delete	The F24=DELETE function key displays only if you selected to delete the contact. Press F24=DELETE to delete the contact. The User Contact Maintenance Selection Screen (p. 7-2) will appear.
Enter	Press ENTER to save your entries. The User Contact Maintenance Selection Screen (p. 7-2) will appear.

User Email Contacts Listing

Once you have set up your user email contacts, you can print a listing of them and their settings through the User Email Contacts Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
User Contact Listing Screen	Used to limit the contacts that print on the list according to one or more user IDs.

User Contact Listing Screen

USER CONTACT LISTING

User ID:

-

To:

.....

F3=Cancel

This screen appears after you select option 13 - User Email Contacts Listing (MENU MSFILE). Use this screen to limit the contacts that print on the list according to one or more user IDs.

Refer to the Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

User Contact Listing Screen Fields and Function Keys

Field/Function Key	Description
User	Key the user ID or range of user IDs for which contacts will print. Leave this field blank to print contacts for all users. <i>Valid Values:</i> Any registered user ID defined through Register A+ User IDs (MENU XACFIG). (2 @ A 10) Optional
F3=Cancel	Press F3=CANCEL to cancel this option and return to MENU MSFILE.
Enter	Press ENTER to confirm your selections. The Report Options Screen will appear. Refer to the Cross Applications User Guide for information about this screen.

User Contact Listing

MS836U	01/14/11	10:52:02	USER CONTACT LISTING				AO/APDEMO	PAGE: 1
All Users								
Contact / Email Address	Cntry	Phone	Ext	Cntry	Fax	Ext		

User: APDEMO		APLUS Demo User						
APDEMO User for demo		1	800-343-2414	0012		0000		
apdemo_user@acofficesupply.com								
Compress: N Password Protect: N Password:								
User: APLUS		APLUS Demo User						
APLUS User for demo				0000		0000		
aplus_user@acofficesupply.com								
Compress: N Password Protect: N Password:								

This listing prints following your selections on the User Contact Listing Screen (p. 7-12) and the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints user e-mail contact information for the user or users you specified on the User Contact Listing Screen (p. 7-12).

User Contact Listing Fields

Report/Listing Fields	Description
(Header Information)	The header information on this list duplicates the From/To ranges you entered on the User Contact Listing Screen (p. 7-12).
Contact/Email Address	This field prints the contact name and the e-mail address for that contact.
Cty/Phone/Extn	These fields print the telephone information for the e-mail contact, including the country access code and extension, if any.
Cty/Fax/Extn	These fields print the fax information for the e-mail contact, including the country access code and extension, if any.

E-mail distribution groups are defined through the Distribution Groups Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE). This option allows you to add, change, or delete an e-mail distribution group code and name.

Distribution groups are only used with Distribution A+ Mail Server. They are not used with the interface of Distribution A+ forms@work to Optio.

Distribution Groups Maintenance

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Distribution Group Maintenance Selection Screen	Used to add, change, or delete a distribution group code.
Distribution Group Maintenance Screen	Use this screen to provide a name for the distribution group you are adding or maintaining.

Distribution Group Maintenance Selection Screen

DISTRIBUTION GROUP MAINTENANCE

Function:

-

(A,C,D)

Distribution Group?

.....

F3=Exit

This screen appears when selecting option 4 - Distribution Groups Maintenance from MENU MSFILE. Use this screen to add, change, or delete a distribution group code.

A distribution group consists of a code and addresses. Distribution groups enable mass e-mailing by allowing multiple e-mail addresses to be associated with a single code (or group). This code can then be entered in the **TO Address**, **CC Address**, or **BCC Address** field on the Email Options Screen (p. B-2). The e-mail will then be sent to all the addresses assigned to that code.

This screen allows you to create, change, and delete distribution group codes. Addresses are assigned to these codes through Distribution Group Assignments (MENU MSFILE).

Distribution Group Maintenance Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Key A to add a distribution group code. Key C to change a distribution group code. Key D to delete a distribution group code. (A1) Required
Distribution Group	Key the distribution group code you want to add or maintain. (A 5) Required
F3=Exit	Press F3=EXIT to exit this option and return to MENU MSFILE.
Enter	Press ENTER to confirm your entries. The Distribution Group Maintenance Screen (p. 8-3) will appear.

Distribution Group Maintenance Screen

DISTRIBUTION GROUP MAINTENANCE

CHANGE

Distribution Group:

WHOLE

Distribution Group Name:

Wholesalers

F12=Return

This screen appears after pressing **ENTER** on the Distribution Group Maintenance Selection Screen (p. 8-2). Use this screen to provide a name for the distribution group you are adding or maintaining.

Distribution Group Maintenance Screen Fields and Function Keys

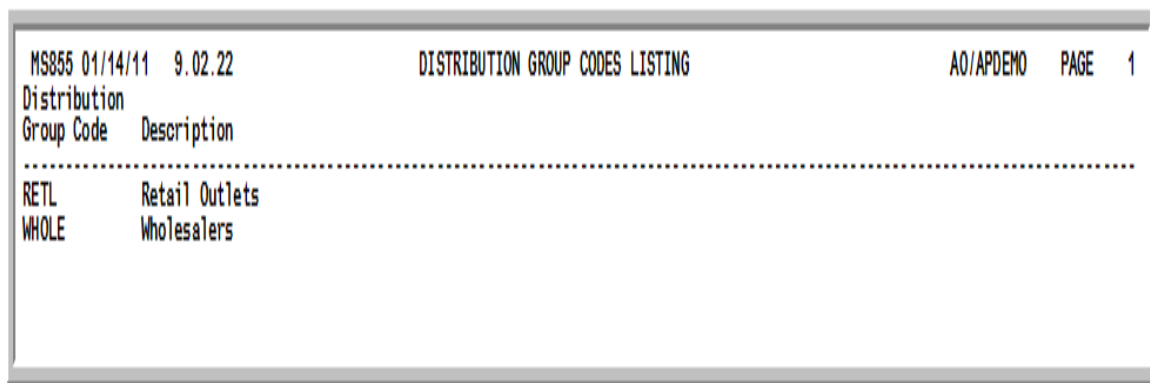
Field/Function Key	Description
Distribution Group	This field displays the code of the distribution group you are adding or maintaining. Display
Distribution Group Name	Key a name for the distribution group you are adding or maintaining. (A30) Required
F12=Return	Press F12=RETURN to return to the Distribution Group Maintenance Selection Screen (p. 8-2) without saving your entries.
F24=Delete	The F24=DELETE function key displays only if you selected to delete the distribution group code. Press F24=DELETE to delete the distribution group code. The Distribution Group Maintenance Selection Screen (p. 8-2) appears.
Enter	Press ENTER to save your entries. The Distribution Group Maintenance Selection Screen (p. 8-2) appears.

Distribution Group Codes Listing

Once you have set up your e-mail distribution groups, you can print a listing of them and their settings through the Distribution Groups Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

This section explains the Distribution Groups Listing option. This option does not have any selection criteria. When you select the Distribution Groups Listing option, the Report Options Screen appears. Refer to the Cross Applications User Guide for a description of this screen.

Distribution Group Codes Listing



MS855 01/14/11 9.02.22	DISTRIBUTION GROUP CODES LISTING	AO/APDEMO PAGE 1
Distribution Group Code	Description	
.....		
RETL	Retail Outlets	
WHOLE	Wholesalers	

Selecting the Distribution Group Codes Listing (MENU MSFILE) displays the Report Options Screen.

This listing prints after pressing **ENTER** on the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints all the distribution group codes defined through Distribution Groups Maintenance (MENU MSFILE).

Distribution Group Codes Listing Fields

Report/Listing Fields	Description
Distribution Group Code	This fields lists the distribution group codes.
Description	This field lists the description that corresponds to the group code.

E-mail addresses are assigned to e-mail distribution groups through the Distribution Group Assignments Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE). When you key the distribution group code in the **TO Address**, **CC Address**, or **BCC Address** field on the Email Options Screen (p. B-2), the e-mail attachment will be sent to all the addresses you assigned to that code.

Distribution groups are only used with Distribution A+ Mail Server. They are not used with the interface of Distribution A+ forms@work to Optio.

Distribution Group Assignments

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Distribution Group Assignment Screen	Used to add or delete an e-mail address from a distribution group.
Distribution Group Email Address Selection Screen	Used to select an e-mail address from a distribution group.
Distribution Group Assignment Confirmation Screen	Used to confirm your entries on the Distribution Group Assignment Screen.

Distribution Group Assignment Screen

DISTRIBUTION GROUP ASSIGNMENT

Function:

-

(A,D)

Distribution Group?

.....

Email Address?

.....

.....

F3=Exit

F4=List

This screen appears after selecting option **5** - Distribution Group Assignments from MENU MSFILE. Use this screen to add or delete an e-mail address from a distribution group.

Distribution Group Assignment Screen Fields and Function Keys

Field/Function Keys	Description
Function	Key A to add an e-mail address. Key D to delete an e-mail address. (A 1) Required
Distribution Group	Key the distribution group code for which you want to add or delete an e-mail address. <i>Valid Values:</i> Any distribution group defined through Distribution Group Maintenance (MENU MSFILE). (A 5) Required
Email Address	Key the e-mail address you want to add to or delete from the distribution group. If you don't remember the e-mail address you want to delete, press F4=LIST to access a list of previously added addresses. To find a valid email address, use the question mark to display the Personal Email Address Selection Screen (p. 7-4). (A 128) Required
F3=Exit	Press F3=EXIT to exit this option and return to MENU MSFILE.

Distribution Group Assignment Screen Fields and Function Keys

Field/Function Keys	Description
F4=List	Press F4=LIST to list all existing distribution groups and the e-mail addresses associated with the group. The Distribution Group Email Address Selection Screen (p. 9-4) will appear. If you key a distribution group code in the Distribution Group field, only addresses for that code will display.
Enter	Press ENTER to confirm your entries. The Distribution Group Assignment Screen (p. 9-2) appears.

Distribution Group Email Address Selection Screen

```

DISTRIBUTION GROUP EMAIL ADDRESS SELECTION

Dist
Sl Group Email Address
1 RETL asavres@lefrancais.winery
2 RETL pmason@napavalley.vineyard
3 RETL wsmythe@bigbenclock.shop

Last

Limits: Distribution Group: .....
        Email Address: .....
Sel:  - ,

F12=Return

```

This screen appears after you press **F4=LIST** on the Distribution Group Assignment Screen (p. 9-2). This screen also appears after you press **F9=DIST GRP** on the Personal Email Address Selection Screen (p. 7-4), if you accessed that screen from the Email Options Screen (p. B-2). Use this screen to select an e-mail address from a distribution group.

This screen displays only those e-mail addresses that have been previously assigned to a distribution group.


Distribution Group Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Sl	The selection number for the e-mail address. Use this number to select a distribution group e-mail address. Display
Dist Group	This column displays the distribution group code. Display
Email Address	The column displays the e-mail address of the contact. Display
Limits: Distribution Group	Key all or part of a distribution group code to limit the information that displays on this screen to the information that matches the limit criteria. (A 25) Optional

Distribution Group Email Address Selection Screen Fields and Function Keys

Field/Function Key	Description
Limits: Email Address	Key all or part of an e-mail address to limit the information that displays on this screen to the information that matches the limit criteria. (A 50) Optional
Sel	Key the number displayed in the SI field that corresponds to the e-mail address you want to select. (N 2,0) Optional
F12=Return	If you accessed this screen from the Distribution Group Assignment Screen (p. 9-2), press F12=RETURN to return to that screen without making a selection. If you accessed this screen from Personal Email Address Selection Screen (p. 7-4), press F12=RETURN to return to that screen without making a selection.
Enter	This key serves multiple functions: <ul style="list-style-type: none"> • If you entered information in the Limits field, press ENTER to update the screen display. • If you keyed a number in the Sel field, press ENTER to select that e-mail address. <ul style="list-style-type: none"> • If you accessed this screen by pressing F4=LIST on the Distribution Group Assignment Screen (p. 9-2), you will be returned to that screen, and the e-mail address you selected will appear in the Email Address field. • If you accessed this screen by pressing F9=DIST GRP on the Personal Email Address Selection Screen (p. 7-4), the Email Options Screen (p. B-2) will appear, and the e-mail address you selected will appear in the TO Address field.

Distribution Group Assignment Confirmation Screen



DISTRIBUTION GROUP ASSIGNMENT ADD

Distribution Group: RETL

Email Address: pmason@napavalley.vineyard

F12=Return

This screen displays after you press **ENTER** on the Distribution Group Assignment Screen (p. 9-2). Use this screen to confirm your entries on that screen.

Distribution Group Assignment Confirmation Screen Fields and Function Keys

Field/Function Key	Description
Distribution Group	This field displays the distribution group you keyed on the Distribution Group Assignment Screen (p. 9-2). Display
Email Address	This field displays the e-mail address you keyed on the Distribution Group Assignment Screen (p. 9-2). Depending on your selection on that screen, the address will be added to or deleted from the distribution group. Display
F24=Delete	The F24=DELETE function key will only display if you selected to delete an e-mail address on the Distribution Group Assignment Screen (p. 9-2). Press F24=DELETE to confirm the deletion of the e-mail address. You will be returned to the Distribution Group Assignment Screen (p. 9-2).
F12=Return	Press F12=RETURN to return to the Distribution Group Assignment Screen (p. 9-2) without adding or deleting an address.
Enter	Press ENTER to add an e-mail address to the group. You will be returned to the Distribution Group Assignment Screen (p. 9-2).

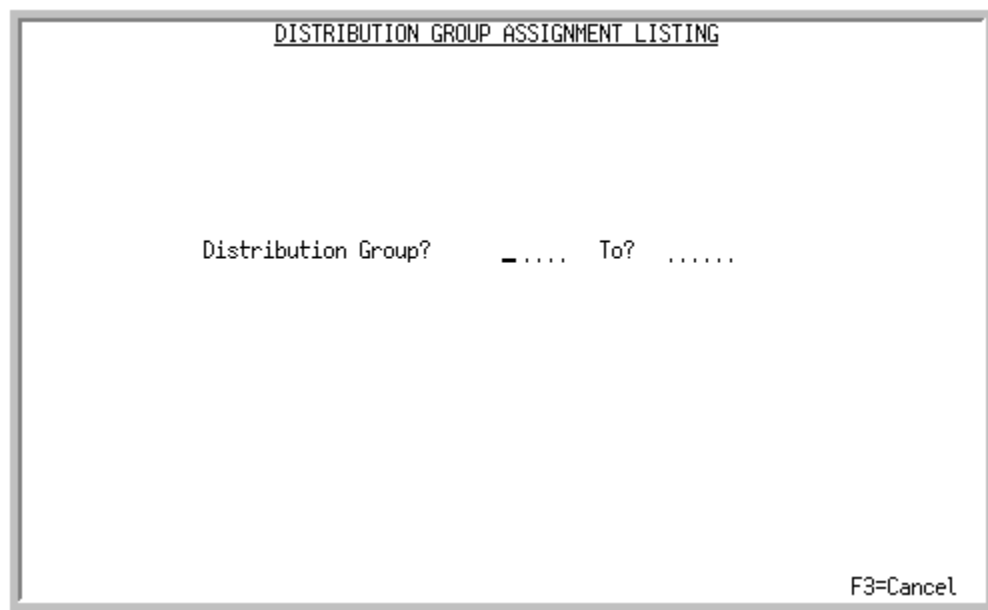
Distribution Group Assignment Listing

Once you have assigned e-mail addresses to your distribution groups, you can print a listing of the assignments and their settings through the Distribution Group Assignments Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Distribution Group Assignment Listing Screen	Used to print a list of existing distribution group assignments or range of distribution group assignments.

Distribution Group Assignment Listing Screen



DISTRIBUTION GROUP ASSIGNMENT LISTING

Distribution Group? ----- To? -----

F3=Cancel

This screen appears after you select option **15** - Distribution Group Assignment Listing (MENU MSFILE). Use this screen to print a list of existing distribution group assignments or range of distribution group assignments.

Refer to the Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Distribution Group Assignment Listing Screen Fields and Function Keys

Field/Function Key	Description
Distribution Group	Use this field to specify a distribution group or range of distribution groups to print on the list. <i>Valid Values:</i> Any distribution group defined through Distribution Groups Maintenance (MENU MSFILE) and assigned e-mail addresses through Distribution Group Assignments (MENU MSFILE). (2 @ A 5) Optional
F3=Cancel	Press F3=CANCEL to cancel this option and return to MENU MSFILE.
Enter	Press ENTER to confirm your entries. The Report Options Screen will appear. Refer to the Cross Applications User Guide for information about this screen.

Distribution Group Assignment Listing

MS846 01/14/11 9:02:24	DISTRIBUTION GROUP ASSIGNMENTS LISTING	AO/APDEMO	PAGE: 1
All Distribution Groups			
Email Address			

Distribution Group: RETL		Retail Outlets	
asavres@lefrancais.winery			
pmason@napavalley.vineyard			
wsmythe@bigbenclock.shop			

This listing prints following your selections on the Distribution Group Assignment Listing Screen (p. 9-8) and the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints the distribution group assignments for the distribution group or range of distribution groups you specify on the Distribution Group Assignment Listing Screen (p. 9-8).

Distribution Group Assignment Listing

Report/Listing Fields	Description
(Header Information)	The header information on this list duplicates the From/To ranges you entered on the Distribution Group Assignment Listing Screen (p. 9-8).
Distribution Group Code	The group code created for the distribution group.
Distribution Group Name	The description of the distribution group.
Email Address	The e-mail address of each contact contained in the specified distribution group.

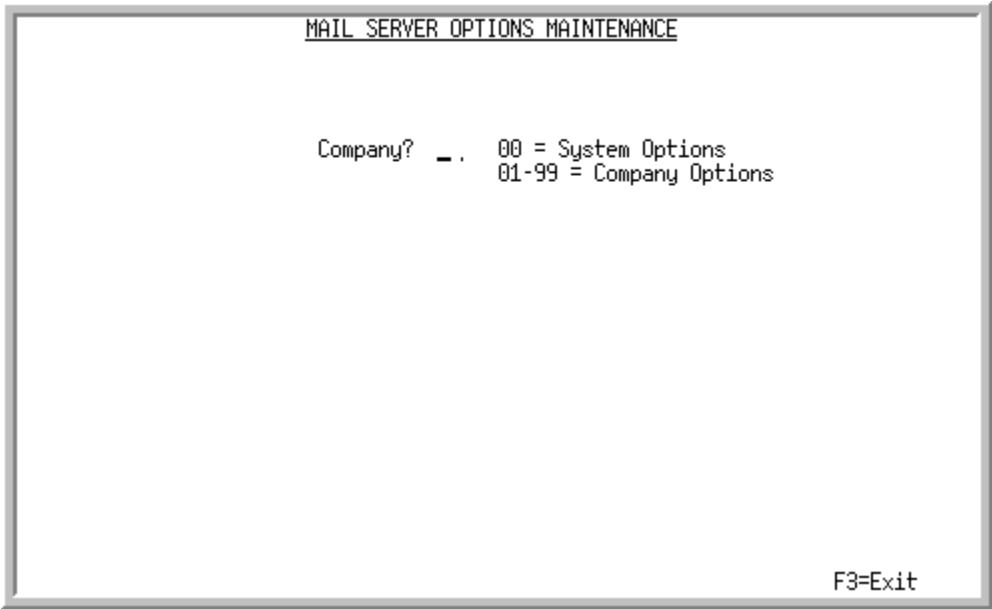
Mail Server options are defined through the Mail Server Options Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE). This option allows you to maintain company specific options for emailing using forms@work and several aspects of the Mail Server Broker.

Mail Server Options Maintenance

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Mail Server Options Maintenance Screen	Used to select whether you want to maintain system wide options, or company specific options.
Mail Server System Options Maintenance Screen	Used to define the job queue, start option, retention properties of the Mail Server Broker, and the default TO email address for listings and reports.
Mail Server Default Email Address Maintenance Screen	Used to define the default 'from', AR, PO, OE and BQ email addresses.
Mail Server Company Options Maintenance Screen	Used to define a customized email template for each document type.
Mail Server Company Custom Form Screen	Used to define the custom email template for the specified document type for the specified company.

Mail Server Options Maintenance Screen



This screen appears after selecting option **6** - Mail Server Options Maintenance from MENU MSFILE. Use this screen to select whether you want to maintain system wide options, or company specific options.

Mail Server Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Company	<p>Use this field to specify the type of Mail Server options you want to maintain.</p> <p>Key 00 or leave this field blank to maintain Mail Server system-wide options.</p> <p>Key a company number to maintain company-specific Mail Server options.</p> <p><i>Valid Values:</i> 00 or blank for system options, or a company number defined through Company Name Maintenance (MENU XAFIELD) for company-specific options.</p> <p>(N 2,0) Required/Blank</p>
F3=Exit	<p>Press F3=EXIT to exit this option and return to MENU MSFILE.</p>
Enter	<p>Press ENTER to save your changes and continue.</p> <p>If you keyed 00 in the Company field or left it blank, the Mail Server System Options Maintenance Screen (p. 10-3) appears.</p> <p>If you keyed a company number in the Company field, the Mail Server Company Options Maintenance Screen (p. 10-8) appears.</p>

Mail Server System Options Maintenance Screen

MAIL SERVER SYSTEM OPTIONS MAINTENANCE	
Mail Server Broker Job Queue:	QINTER,....
Start Mail Server Broker when A+ is started:	Y, (Y,N)
Number of days to keep Mail Server requests:	...,7.
Default TO Address to User Address for Listings & Reports:	N, (Y,N)

F12=Return

This screen appears after keying **00** (system options) in the **Company** field and pressing **ENTER** on the Mail Server Options Maintenance Screen (p. 10-2).

Use this screen to define the job queue, start option, retention properties of the Mail Server Broker, and the default TO email address for listings and reports.

Mail Server System Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Mail Server Broker Job Queue	<p>Key the job queue you want to assign to the Mail Server Broker.</p> <p><i>Valid Values:</i> A queue set up specifically for the Mail Server Broker Job Queue, or any job queue set up on the System i that supports multiple concurrent jobs.</p> <p>(A 10) Required</p>
Start Mail Server Broker when A+ is started	<p>Use this field to control whether or not the Mail Server Broker starts when Distribution A+ is started. If you do not start the Mail Server Broker automatically with the start of Distribution A+, you must start it manually through the Start Mail Server Broker option (MENU MSMAIN).</p> <p>Key Y to start the Mail Server Broker automatically when Distribution A+ is started.</p> <p>Key N if you do not want the Mail Server Broker to start automatically when Distribution A+ is started.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>

Mail Server System Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Number of days to keep Mail Server requests	<p>When the Mail Server Broker is started, it purges requests older than the number of days you define in this option. Use this field to control how long the Mail Server Broker will retain Mail Server requests. Requests must be kept for at least 7 days and cannot be kept for more than 120 days.</p> <p>Key the number of days you want the system to keep Mail Server Requests.</p> <hr/> <p>NOTE: If you save a Mail Server request through Mail Server Inquiry (MENU MSMAIN), it will not be purged when it reaches the age limit specified in this field. You must delete saved requests manually through Mail Server Inquiry (MENU MSMAIN).</p> <hr/> <p><i>Default Value:</i> 7</p> <p><i>Valid Values:</i> Any number between 7 and 120</p> <p>(N 3,0) Required</p>
Default TO Address to User Address for Listings & Reports	<p>Use this field to specify, for listings and reports, if you want the TO Address field on the Email Options Screen (p. B-2) to be automatically defaulted to the user's email address (if available) that is running the listing or report. The user's email address is defined in the User Email Address field through Register A+ User IDs (MENU XACFIG).</p> <p>Key Y to use the user's email address (if available) that is running the listing or report as the default TO Address for the listing or report. If one is not available, the TO Address will default to the Mail Server default system option defined in the Email Address field on the Mail Server Default Email Address Maintenance Screen (p. 10-5).</p> <hr/> <p>NOTE: If this field is Y, it does not apply to specialized documents such as Purchase Orders, Invoices, Acknowledgments, etc. For specialized documents, you will have to make an email address selection on the Email Options Screen (p. B-2).</p> <hr/> <p>Key N if you do not want the TO Address defaulted to the user's email address that is running the listing or report. Instead, you will be required to key in the TO Address on the Email Options Screen (p. B-2).</p> <p><i>Default Value:</i> N</p> <p>(A 1,0) Required</p>
F12=Return	Press F12=RETURN to exit this option and return to the Mail Server Options Maintenance Screen (p. 10-2).
Enter	Press ENTER to confirm your selections. The Mail Server Default Email Address Maintenance Screen (p. 10-5) will appear.

Mail Server Default Email Address Maintenance Screen

```

MAIL SERVER DEFAULT EMAIL ADDRESS MAINTENANCE

Company:    1    A & C Office Supply
Email Address:      a&c_office_supply.net .....
AR Email Address:   creditmanager@a&c_office_supply.net .....
PO Email Address:   seniorbuyer@a&c_office_supply.net .....
OE Email Address:   sales@a&c_office_supply.net .....
BQ Email Address:   newsales@a&c_office_supply.net .....

F12=Return
  
```

This screen appears after pressing **ENTER** on the Mail Server System Options Maintenance Screen (p. 10-3) or the Mail Server Company Custom Form Screen (p. 10-9).

Use this screen to define the default 'from', AR, PO, OE and BQ email addresses.

The hierarchy for which email address is used, is as follows:

1. User email address, if found
2. AR, PO, OE, BQ at the company level, if found
3. AR, PO, OE, BQ at the system level, if found
4. Company level default, if found
5. System level default

If there is no email address on file for the vendor and the PO is flagged to email to the vendor, either the company default PO email address (if available) or the company default email address will be used to send emails.

NOTE: If an error occurs for an email address, a general message will appear on the lower portion of the screen and the cursor will be positioned on the email address that has the error.

Mail Server Default Email Address Maintenance Fields and Function Keys

Field/Function Key	Description
Company	<p>This field displays only when maintaining company options (not system options) for Mail Server.</p> <p>This field displays the company number for which you are defining email addresses.</p> <p>Display</p>
Email Address	<p>Use this field to specify a default email address for the sender. The address in this field is used as the FROM Email Address on the email, if the user sending the email does not have a User Email Address defined through Register A+ User IDs (MENU XACFIG) and no application (AR, PO, OE, BQ) default addresses have been entered on this screen.</p> <p>This field is only required when maintaining system options for Mail Server. When maintaining company options, it is optional.</p> <hr/> <p>NOTE: If there is no email address on file for the vendor and the PO is flagged to email to the vendor, either the company default PO email address (if available) or the company default email address will be used to send emails.</p> <hr/> <p>(A 128) Required/Optional</p>
AR Email Address	<p>Use this field to specify a default Accounts Receivable (AR) email address for the sender. The address in this field is used as the FROM Email Address on Invoices, Statements, Overdue Notices and Remittance Advice.</p> <p>This field is optional regardless if you are maintaining system options or company options for Mail Server.</p> <p>(A 128) Optional</p>
PO Email Address	<p>Use this field to specify a default Purchasing (PO) email address for the sender. The address in this field is used as the FROM Email Address on Purchase Orders that are emailed.</p> <p>This field is optional regardless if you are maintaining system options or company options for Mail Server.</p> <hr/> <p>NOTE: If there is no email address on file for the vendor and the PO is flagged to email to the vendor, either the company default PO email address (if available) or the company default email address will be used to send emails.</p> <hr/> <p>(A 128) Optional</p>

Mail Server Default Email Address Maintenance Fields and Function Keys

Field/Function Key	Description
OE Email Address	<p>Use this field to specify a default Order Entry (OE) email address for the sender. The address in this field is used as the FROM Email Address on Pick Lists, Order Acknowledgments and Pack Lists that are emailed.</p> <p>This field is optional regardless if you are maintaining system options or company options for Mail Server.</p> <p>(A 128) Optional</p>
BQ Email Address	<p>Use this field to specify a default Bid & Quote (BQ) email address for the sender. The address in this field is used as the FROM Email Address on Vendor RFQ's and Customer Quotes that are emailed.</p> <p>This field is optional regardless if you are maintaining system options or company options for Mail Server.</p> <p>(A 128) Optional</p>
F12=Return	<p>Press F12=RETURN to return to the previous screen, without saving any changes made on this screen.</p>
Enter	<p>Press ENTER to confirm your selections and continue. The Mail Server Options Maintenance Screen (p. 10-2) appears.</p>

Mail Server Company Options Maintenance Screen

MAIL SERVER COMPANY OPTIONS MAINTENANCE

Company: 1 A & C Office Supply

(X = custom form, blank = system default)

Acknowledgement

Invoice

Pack Slip

Pick List

A/R Statements

Purchase Order

-

..

..

..

..

..

F12=Return

This screen appears after entering a company number in the **Company** field and pressing **ENTER** on the Mail Server Options Maintenance Screen (p. 10-2).

Use this screen to define a customized email template for each document type.

Mail Server Company Options Maintenance Fields and Function Keys

Field/Function Key	Description
(Documents)	<p>Use these fields to indicate whether you want to create a custom email coversheet for the displayed document types. A custom email coversheet contains form text for the email to which the specified document type will be attached.</p> <p>Key X beside each document type for which you want to create a custom email coversheet.</p> <p>Leave these fields blank if you do not want to create a custom email coversheet.</p> <p>(A 1) Required/Blank</p>
F12=Return	Press F12=RETURN to return to the Mail Server Options Maintenance Screen (p. 10-2).
Enter	Press ENTER to confirm your selections and continue. The Mail Server Company Custom Form Screen (p. 10-9) appears.

Mail Server Company Custom Form Screen

```

MAIL SERVER COMPANY CUSTOM FORM

Company:  1  A & C Office Supply
Document: 1  Acknowledgement

Attachment: Acknowledgement.....
Subj:  Acknowledgement.....

Body: .....
.....
.....
.....
.....
.....
.....

F12=Return

```

This screen appears once for each document type beside which you keyed an **X** on the Mail Server Company Options Maintenance Screen (p. 10-8).

Use this screen to define the custom email coversheet for the specified document type for the specified company. The information specified on this screen can be overridden on the Email Options Screen (p. B-2), if you choose to email the document.

Mail Server Company Custom Form Fields and Function Keys

Field/Function Keys	Description
Attachment	<p>Use this field to specify the filename for the document that will be attached to the email for which you are defining a custom coversheet.</p> <p><i>Valid Values:</i> The name of a valid document that can be emailed.</p> <p>(A 20) Required</p>
Subj	<p>Use this field to specify the default subject line for the email that transmits this document.</p> <p>(A 70) Optional</p>
Body	<p>Use this field to key the default body text for the email that transmits this document.</p> <p>If you are using forms@work, only the first 280 characters will be transmitted. the 280 characters must be within the first 4 lines of the field.</p> <p>(A 490) Optional</p>

Mail Server Company Custom Form Fields and Function Keys

Field/Function Keys	Description
F12=Return	Press F12=RETURN to return to the Mail Server Company Options Maintenance Screen (p. 10-8) without saving your changes.
Enter	<p>Press ENTER to save your changes.</p> <p>If you keyed X beside additional document types, this screen will refresh and the next document type's custom form information will appear.</p> <p>If there are no more custom coversheets to maintain, pressing ENTER will display the Mail Server Default Email Address Maintenance Screen (p. 10-5) and your changes will be saved.</p>

Mail Server Options Listing

Once you have set up your Mail Server options, you can print a listing of them through the Mail Server Options Listing option on the Mail Server File Maintenance Menu (MENU MSFILE).

This section explains the Mail Server Options Listing option. This option does not have any selection criteria. When you select the Mail Server Options Listing option, the Report Options Screen appears. Refer to the Cross Applications User Guide for a description of this screen.

Mail Server Options Listing

MS805 04/30/14 17.12.00	MAIL SERVER SYSTEM OPTIONS LISTING	AW/APDEMO	PAGE	1

Mail Server Broker Job Queue		:	QINTER	
Start Mail Server Broker When A+ is Started		:	Y	
No. of Days to Keep Mail Server Requests		:	007	
Dft TO Addr to User Addr for Lists & Reports		:	Y	
Dft FROM Email Address:			apdemo@infor.com	
AR Default From Email Address:			creditmanager@infor.com	
PO Default From Email Address:			inventorycontrolmanager@infor.com	
OE Default From Email Address:			salesmanager@infor.com	
BQ Default From Email Address:			prospectmanager@infor.com	

This listing prints after pressing **ENTER** on the Report Options Screen (refer to the Cross Applications User Guide for information about this screen).

This listing prints the values you selected through Mail Server Options Maintenance (MENU MSFILE).

Refer to Mail Server Options Maintenance (MENU MSFILE) for a description of the fields on this listing.

You can define stand-alone contacts through the Customer Contacts Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE). Once defined, a stand-alone contact can be linked to multiple customers and/or customer/ship-to addresses, allowing for a contact to be shared across entities.

Use the Contacts Listing menu option on the Mail Server File Maintenance Menu (MENU MSFILE) to print a listing of all stand-alone contacts that have been defined.

Contacts Listing

The screens in this option and a brief description of their purpose are listed in the following table. A complete description of each screen is provided in this section.

Title	Purpose
Contact ID Listing	Use to print a listing of stand-alone contact information.

Contact ID Listing

XA882 03/10/11 18:28:02				CONTACT ID LISTING				BM/APDEMO		PAGE: 1	
ID:	2					Salutation:	Mr.				
First Name:	John					Middle Name:					
Last Name:	Peters					Job Title:	Sr. Purchasing Agent				
Department:	Procurement					Contact:	John Peters				
Phone:	011 205.949.7411	4321					Fax:	011 205.949.7413	1234		
Email:	john.peters@bonsecourschools										
Compress:	N	Password Protect:	N	Password:							
CM Preferred:	A	CM Email:	Y	CM Bulk Email:	Y	CM Phone:	Y	CM Fax:	Y	CM Mail:	Y
Address Name:	John Peters					Street 1:	P.O. Box 60				
Street 2:					Street 3:						
Street 4:					City:	Bon Secour					
State/Prov:	AL					Zip/Postal:	36511-0060				
Cntry/Region:	USA					Address Type:	0				
Employer Ref:											
Type	Code	Name									
C	1/10	Bon Secour School Department									
C	1/10/1	Bon Secour Middle School									
C	1/10/2	Bon Secour Wilmer Cnty Schools									
ID:	1					Salutation:	Mrs.				
First Name:	Jane					Middle Name:	L.				
Last Name:	Rivers					Job Title:	Accounting Manager				
Department:	Finance					Contact:	Jane Rivers				
Phone:	401 823.7632	9873					Fax:	401 832.7639			
Email:	jrivers@financialmanagement										
Compress:	N	Password Protect:	N	Password:							
CM Preferred:	A	CM Email:	Y	CM Bulk Email:	Y	CM Phone:	Y	CM Fax:	Y	CM Mail:	Y
Address Name:	Jane Rivers					Street 1:	641 Bald Hill Road				
Street 2:					Street 3:						
Street 4:					City:	Warwick					
State/Prov:	Rhode_Island_&_Providence_PInt					Zip/Postal:	02886-0641				
Cntry/Region:	USA					Address Type:	0				
Employer Ref:											
Type	Code	Name									
C	1/10	Bon Secour School Department									
C	1/100	Financial Management Services									
ID:	3					Salutation:	Mr.				
First Name:	John					Middle Name:					
Last Name:	Rogers					Job Title:	Collections Consultant				
Department:	Finance					Contact:	John Rogers				
Phone:	011 205-949-7412	8765					Fax:	011 205-949-7413	5678		
Email:	john.rogers@bonsecourschools										
Compress:	N	Password Protect:	N	Password:							
CM Preferred:	A	CM Email:	Y	CM Bulk Email:	Y	CM Phone:	Y	CM Fax:	Y	CM Mail:	Y
Address Name:	John Rogers					Street 1:	P.O. Box 60				

This report prints following your selections on the Report Options Screen (refer to the Cross Applications User Guide for details about this screen).

This listing prints stand-alone contact information. For a description of the fields that print on this listing, refer to the screens shown in the Customer Contacts Maintenance option on the Mail Server File Maintenance Menu (MENU MSFILE).

Use this option to define file export definitions, such as:

- Integrated File System (IFS) Paths
- Parameters used to open PC files exported to the IFS directory
- PC Programs
- how to set up and launch PC Programs from iSeries

By setting up file export definitions through this option, you have the ability to view and save reports generated on the iSeries using a PC based application on an attached personal computer.

Define File Exports through the File Export Definition option on the PC File Export Menu (MENU EXMAIN) or the PC File Export Options on the Cross Application - File Maintenance (MENU XAFILE).

Important

Users must have access to the Integrated File System (IFS) drive, and the IFS route must be set up on your system. Refer to IBM Access documentation for setting up and managing the IFS.

NOTE: The export process requires that Mail Server system options be defined.

Reports That Support Excel CSV/TSV Exports

The following tables include the specific reports that can be exported to Excel in a CSV (comma separated value) or a TSV (tab separated value) format.

Reports That Support Excel CSV/TSV Exports

Module	Report	Program
A/P	Open Payables by Vendor Report (Summary)	AP300

Reports That Support Excel CSV/TSV Exports

Module	Report	Program
A/P	Open Payables by Due Date Report	AP310
A/R	Aged Trial Balance (Detail and Summary) by Salesrep	AR300S
A/R	Aged Trial Balance (Detail and Summary) by Descending Amount Due Order	AR305
A/R	Aged Trial Balance (Detail and Summary) by Call Rep /Descending Amount Due Order	AR305R
A/R	Aged Trial Balance (Detail and Summary) by Salesrep /Descending Amount Due Order	AR305S
A/R	Customer Profile	AR350
A/R	A/R Payment History	AR460
G/L	General Ledger Report	GL300
G/L	General Ledger Detail	GL310
I/A	Inventory Valuation Report	IA342
I/M	Item Demand 3-Year Report	IM410
O/E	Open Order Summary	OE300
O/E	Tax Report	OE370
O/E	Item Price List	OE380
P/O	Open Purchase Order Summary by Vendor Number	PO342
P/O	Open Purchase Order Summary by PO Number	PO343
P/O	Open Purchase Order Detail by Item Number	PO344
P/O	Open Purchase Order Detail by Vendor Number	PO346
P/O	Open Purchase Order Detail by PO Number	PO347
P/O	Purchase Order History Summary by Vendor Number	PO352
P/O	Purchase Order History Summary by Item Number	PO353
P/O	Purchase Order History Detail by Vendor Number	PO356
P/O	Purchase Order History Detail by PO Number	PO357
S/A	MTD/YTD Sales Analysis Summary by Territory/Salesrep/Customer Class	SA404A

Reports That Support Excel CSV/TSV Exports

Module	Report	Program
S/A	MTD/YTD Sales Analysis Summary by Territory/Salesrep/Customer Name	SA404C
S/A	MTD/YTD Sales Analysis Summary by Salesrep/Customer Class	SA404D
S/A	MTD/YTD Sales Analysis Summary by Salesrep/Customer Name	SA404F
S/A	Comparative Sales Analysis Summary by Territory/Salesrep/Customer Class	SA424A
S/A	Comparative Sales Analysis Summary by Territory/Salesrep/Customer Name	SA424C
S/A	Comparative Sales Analysis Summary by Salesrep/Customer Class	SA424D
S/A	Comparative Sales Analysis Summary by Salesrep/Customer Name	SA424F
S/A	Customer Ranking Report	SA306
S/A	Item Ranking Report	SA316

PC File Export Options

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
File Export Prompt Screen	Use to specify the type of file export options you want to add/maintain (company or specific), and to access the File Export PC Program Definition Prompt Screen, where you define PC program parameters.
File Export Options Screen	Use to select the Generic Report Prompt IFS Path to be used for generic reports or the Invoices Preview IFS Path to be used for the Invoice Preview functionality in Order Entry.
File Export PC Program Definition Prompt Screen	Use to define PC Program parameters.
PC Program Selection Screen	Use to add a new PC program or maintain an existing one.

Title	Purpose
PC Program Definition Screen	Use to define how to set up and launch a PC program from the iSeries.

File Export Prompt Screen

FILE EXPORT PROMPT

Company? _ . (Blank for System Options)

F2=PC Program F3=Exit

This screen displays after selecting option **1** - PC File Export Options (MENU EXMAIN) or option **32** - PC File Export Options (MENU XAFIELD). Use this screen to specify the type of file export options you want to add/maintain: company specific or system wide options.

You also have the option to press **F2=PC PROGRAM** to access the File Export PC Program Definition Prompt Screen (p. 12-9), where you define PC program parameters.

File Export Prompt Screen Fields and Function Keys

Field/Function Key	Description
Company	<p>Use this field to specify the type of file export options you want to add/maintain: company specific or system wide options.</p> <p>Key a company number to maintain company specific file export options. When you select a company, the File Export Options Screen (p. 12-7) prompts you for the Invoices Preview IFS Path to be used for the Invoice Preview functionality in Order Entry.</p> <p>Leave this field blank to maintain system wide options. When this field is left blank, the File Export Options Screen (p. 12-7) prompts you for the Generic Report Prompt IFS Path to be used for generic reports and listings.</p> <hr/> <p>NOTE: This field is not protected if the Multi Company field is N in System Options Maintenance (MENU XAFILE).</p> <hr/> <p><i>Default Value:</i> 00 or blank for system options</p> <p><i>Valid Values:</i> a company number defined through Company Name Maintenance (MENU XAFILE) for company specific options, or blank for system options</p> <p>(N 2,0) Required/Blank</p>
F2=PC Program	Press F2=PC PROGRAM to define PC program parameters. The File Export PC Program Definition Prompt Screen (p. 12-9) will display.
F3=Exit	Press F3=EXIT to cancel this option and return to the menu.
Enter	Press ENTER to confirm your selections and proceed to the File Export Options Screen (p. 12-7).

File Export Options Screen

```

FILE EXPORT OPTIONS

Generic Report Prompt
IFS Path: /APLUS/EXPORT.....

F12=Return

```

This screen displays after pressing **ENTER** on the File Export Prompt Screen (p. 12-5). If you left the **Company** field blank on the File Export Prompt Screen (p. 12-5) to define system options, the **Generic Report Prompt IFS Path** field displays on this screen. If you keyed a company number on the File Export Prompt Screen (p. 12-5), the **Invoices Preview IFS Path** field displays on this screen instead.

When defining system options, use this screen to select the **Generic Report Prompt IFS Path** to be used for generic reports.

When defining company options, use this screen to select the **Invoices Preview IFS Path** to be used for the Invoice Preview functionality in Order Entry.

File Export Options Screen Fields and Function Keys

Field/Function Key	Description
Generic Report Prompt IFS Path	<p>This field displays if you left the Company field blank on the File Export Prompt Screen (p. 12-5) to define system options.</p> <p>Use this field to key the IFS (Integrated File System) path where the PC files will be exported to for generic reports and listings.</p> <p>(A 50) Required</p>
Invoices Preview IFS Path	<p>This field displays if you keyed a company number in the Company field on the File Export Prompt Screen (p. 12-5).</p> <p>Use this field to key the IFS (Integrated File System) path where Invoices will be exported to for the Invoice Preview functionality in Order Entry.</p> <p>(A 50) Required</p>

File Export Options Screen Fields and Function Keys

Field/Function Key	Description
F12=Return	Press F12=RETURN to return to the previous screen without making a selection.
Enter	Press ENTER to confirm your selection and return to the previous screen.

File Export PC Program Definition Prompt Screen

```
FILE EXPORT PC PROGRAM DEFINITION PROMPT

User:  _.....      (Blank for system)
Display ID: .....

F3=Exit  F4=User List  F12=Return
```

This screen displays after pressing **F2=PC PROGRAM** on the File Export Prompt Screen (p. 12-5). Use this screen to define PC Program parameters. These parameters will be used to open the PC files exported to the Integrated File System (IFS) directory.

The hierarchy in which you can define parameters, from the most specific level to the most generic level, includes:

- Defining parameters at the system level (leave the **User** field blank for system level)
- Defining parameters at the user level (key a user ID in the **User** field)
- Defining parameters at the user and display ID level (key a user ID in the **User** field and a System i display ID in the **Display ID** field)

File Export PC Program Definition Prompt Screen Fields and Function Keys

Field/Function Key	Description
User	<p>You have the option to define PC Program parameters system wide or for a particular user.</p> <p>To define program parameters system wide, leave this field blank. This is the most specific level you can define parameters for.</p> <p>To define program parameters for a particular user, key the ID of the user, or press F4=USER LIST to access a user list if you do not recall the user ID. You must key a user ID in this field if the Display ID field contains a value.</p> <p><i>Default Value:</i> Blank for system</p> <p><i>Valid Values:</i> Any user ID defined through Register A+ User IDs (MENU XACIFG) or blank for system.</p> <p>(A 10) Optional/Required</p>
Display ID	<p>If you keyed a user ID in the User field, use this field to key the System i Display ID.</p> <p><i>Default Value:</i> Blank</p> <p>(A 10) Optional</p>
F3=Exit	<p>Press F3=EXIT to return to the calling menu.</p>
F4=User List	<p>Press F4=USER LIST to display the User List Screen, which lists users (users in the User File in the current base) and environment users (users in the User Master File in the current environment).</p> <p>Refer to Maintaining Users (MENU XASCTY) in the User Security User Guide where the User List Screen is described.</p>
F12=Return	<p>Press F12=RETURN to return to the previous screen without saving your selections.</p>
Enter	<p>Press ENTER to confirm your selections and proceed to the next screen.</p>

PC Program Selection Screen

```

PC PROGRAM SELECTION

System Defined Programs

PC Program      Description
1 START IEXPLORE Internet Explorer
2 START NOTEPAD  Notepad
3 START WINWORD  Microsoft Word
4 START WORDPAD  Wordpad

Sel: _ , Last

F6=New Program    F10=Maintain Program    F12=Return

```

This screen displays after pressing **ENTER** on the File Export PC Program Definition Prompt Screen (p. 12-9). If you keyed a user in the **User** field on the File Export PC Program Definition Prompt Screen (p. 12-9), this screen displays the PC Program and Description defined for the selected user. If you left the **User** field blank on the File Export PC Program Definition Prompt Screen (p. 12-9), this screen displays the PC Program and Description defined for the system. The PC programs that display are from the PC File Export Program File (PCPGM) for the system or selected user, if applicable.

Use this screen to add a new PC program with **F6=NEW PROGRAM** or maintain an existing one using the **Sel** field and **F10=MAINTAIN PROGRAM**.

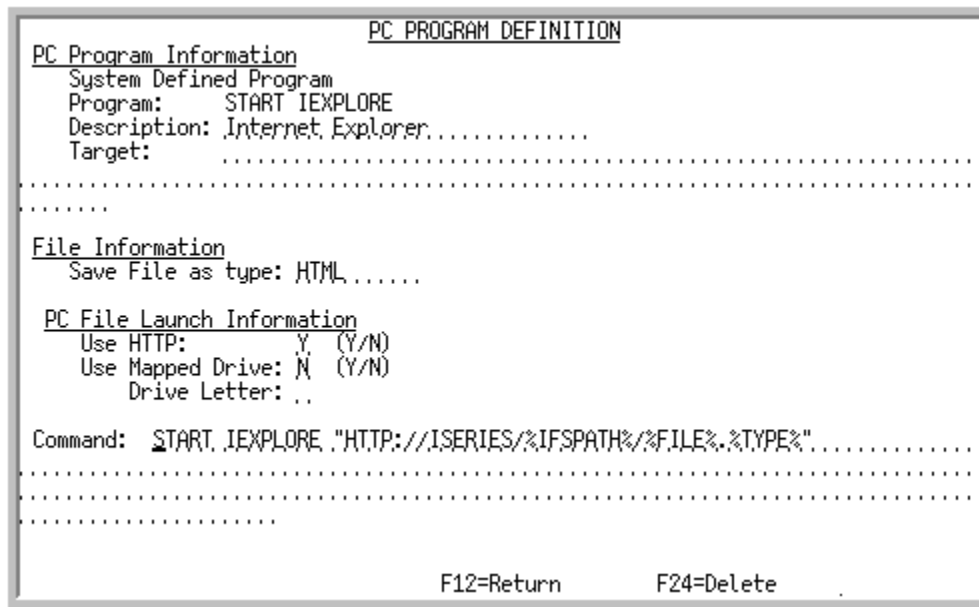
NOTE: When using the file export capabilities, Internet Explorer, Notepad, Microsoft Word, and Wordpad will be set up at the system level as default values. Depending on your network/PC configuration, these default values may need to be changed.

NOTE: The file export capability for Microsoft Excel comma separated values (.csv) and tab separated value (.tsv) files will be supported but must be added to this file manually because all reports do not support this type of export. Each report that supports CSV/TSV exports is individually identified or you can view the list as described in Reports That Support Excel CSV/TSV Exports (p. 12-1).

PC Program Selection Screen Fields and Function Keys

Field/Function Key	Description
Sel	Use this field if you want to maintain an existing PC program. Key the reference number of the PC program (shown on the top portion of the screen) you want to select and press F10=MAINTAIN PROGRAM to maintain the program. The PC Program Definition Screen (p. 12-13) will display. (N 2,0) Optional
F6=New Program	Press F6=NEW PROGRAM to add a new PC program. The PC Program Definition Screen (p. 12-13) will display.
F10=Maintain Program	After entering a value in the Sel field, press F10=MAINTAIN PROGRAM to maintain the selected program. The PC Program Definition Screen (p. 12-13) will display.
F12=Return	Press F12=RETURN to return to the previous screen without saving your entries on this screen.

PC Program Definition Screen



```

PC PROGRAM DEFINITION
PC Program Information
System Defined Program
Program:      START IEXPLORE
Description:  Internet Explorer.....
Target:      .....
.....
File Information
Save File as type: HTML, .....
PC File Launch Information
Use HTTP:    Y (Y/N)
Use Mapped Drive: N (Y/N)
Drive Letter: ..
Command:  START IEXPLORE "HTTP://ISERIES/%IFSPATH%/%FILE%.%TYPE%".....
.....
.....
F12=Return  F24=Delete

```

This screen displays after pressing **F6=NEW PROGRAM** on the PC Program Selection Screen (p. 12-11) to add a new program, or after selecting an existing program and pressing **F10=MAINTAIN PROGRAM** to maintain the program. Use this screen to define how to set up and launch a PC program from the iSeries.

Important

Users must have access to the Integrated File System (IFS) drive, and the IFS route must be set up on your system. Refer to IBM Access documentation for setting up and managing the IFS.

PC Program Definition Screen Fields and Function Keys

Field/Function Key	Description
Program	<p>Key the name of the program or executable which will be launched from the iSeries.</p> <p>Examples:</p> <ul style="list-style-type: none">• to launch Internet Explorer, the IBM i would run the PC command START IEXPLORER• to launch Note Pad, the IBM i would run the PC command START NOTEPAD• to launch Microsoft Word, the IBM i would run the PC command START WINWORD• to launch Wordpad, the IBM i would run the PC command START WORDPAD• to launch Microsoft Excel, the IBM i would run the PC command START EXCEL <p>(N 30,0) Required</p>
Description	<p>Key the description of the PC program that will be launched from the iSeries. For example, if the program is IEXPLORER, the description would be Internet Explorer.</p> <p>(N 30,0) Required</p>
Target	<p>Key the folder on the user's PC where the PC program will be launched from.</p> <p>(N 150,0) Optional</p>
Save File as type	<p>Key the default file type to be used as your file extension when you select this PC program to run. For example, HTML, RTF, TXT, CSV, TSV, etc.</p> <p>(N 10,0) Optional</p>

PC Program Definition Screen Fields and Function Keys

Field/Function Key	Description
PC File Launch Information	<p>When opening a file on the IFS (Integrated File System), you have the ability to open the file using the IBM HTTP Server or by using a mapped drive. You cannot select to use both; that is, the Use HTTP and Use Mapped Drive fields cannot both be Y. Also, if both of these fields are N, it indicates that the UNC (Universal Naming Convention) Path will be used as the default to open your document. If using the UNC Path, it is suggested that you verify that users have access to the path. It is helpful if the network passwords and user IDs match the ones on the iSeries.</p> <ul style="list-style-type: none"> • Use HTTP: If you want to open the file on the IFS using the IBM HTTP Server, key Y in this field. Otherwise, key N. If you select Y, only certain PC programs, such as Internet Explorer and Word, will be able to be opened using the HTTP Server. <hr/> <p>NOTE: If using the IBM HTTP Server, refer to Configuring the HTTP Server File (p. 12-16).</p> <hr/> <ul style="list-style-type: none"> • Use Mapped Drive: If you want to open the file on the IFS using a mapped drive, key Y in this field. Otherwise, key N. <ul style="list-style-type: none"> • Drive: If you keyed Y in the Use Mapped Drive field, you must key the drive letter in this field that will be used to open the file. <hr/> <p>Important</p> <p>The drive letter you enter in the Drive field, must be a mapped drive to your iSeries IFS directory, where the exported files will be located.</p> <hr/> <p>(3 @ A 1) Required/Optional</p>

PC Program Definition Screen Fields and Function Keys

Field/Function Key	Description
Command	<p>Once all other values have been entered on this screen, the PC sample command will be generated and automatically displayed in this field once you press ENTER. Note that if a value already exists in this field, a new PC command will not be generated.</p> <p>This command is used to launch and open PC files. You have the option to change this command, if needed. For example, you may need to substitute an IP Address for your System Name, add an additional sub folder(s), or add additional parameters.</p> <p>Example: :</p> <p>If the Command Line is:</p> <p>WINWORD "HTTP://ISERIES/%IFSPATH%/%FILE%.%TYPE%"</p> <ul style="list-style-type: none">• WINWORD is the Program.• "HTTP://ISERIES/ is the System Name (the IBM i name where the IFS files are stored).• %IFSPATH% is a variable IFS path name where files will be saved. This value will default from the PC file definitions.• /%FILE%.%TYPE% represent the file name and extension of the file being exported.
F12=Return	Press F12=RETURN to return to the previous screen.
F24=Delete	<p>F24=DELETE displays in maintenance mode only (that is, you selected an existing program and pressed F10=MAINTAIN PROGRAM on the PC Program Selection Screen (p. 12-11)).</p> <p>Press F24=DELETE to delete the selected PC Program. You will be prompted to confirm your deletion.</p>
Enter	Press ENTER to confirm your entries. The Command field will be filled in with the command that will be used to launch and open PC files.

Configuring the HTTP Server File

When opening a file on IFS, you have the ability to open the file using IBM HTTP Server or by using a mapped drive. Refer to Appendix C: Configure the HTTP Server File in the Installation & Update Guide for instructions for setting up your HTTP Server.

This option assists you in debugging any PC configuration problems which may exist in the Export process.

Use this option to activate the debug file export process for your current session. The debug file export process applies when you have selected to open (not save) your report, form or listing using a selected PC Program.

If you activate the debug process, the following occurs when you select a report, form or listing to run:

- The Report Options Screen displays. Refer to the Cross Applications User Guide for information on this screen.
- You key **Y** in the **Export Report** field on the Report Options Screen to export the report, form or listing.
- The PC File Export Selection Screen (Cross Applications User Guide) displays from the Report Options Screen, allowing you to open or save the selected report, form or listing. You key **O** in the **Open or Save File** field to open your report, form or listing using a selected PC Program.
- The Open With Selection Screen (Cross Applications User Guide) displays, listing the programs you can select to open the file with. Once you select the program and press **ENTER**, instead of the file being opened with the program you selected, the Debug File Export Screen (Cross Applications User Guide) will display (however, the file will still be saved in the IFS directory). If you did not select to activate the debug file export process, the file would be opened in the selected program and the debug process would be skipped.

The Debug File Export Screen (Cross Applications User Guide) lists the PC command which is run by the System i and the Integrated File System (IFS) path which your document is stored to. You will be able to use this debug screen to locate the command you need to key on a command line to validate that the export is working correctly.

Activate the debug file export process through the Start Debug File Export option on the PC File Export Menu (MENU EXMAIN). Upon selecting this menu option, the following message displays:

File Exports will now be in debug mode for your (this) session. Once you choose to export any report, a screen will appear listing what PC program the export is trying to launch and the IFS path the export file is created in. Press Enter to Continue.

Upon pressing **ENTER**, the start debug function will be activated.

To deactivate the debug process, select the End Debug File Export option on the PC File Export Menu (MENU EXMAIN). The debug process will also be automatically ended for your session when you sign off.

NOTE: Launching a PC based application from the System i requires a 5250 emulation device running on a PC. To test this connection, you can key the following two commands on a System i command line:

1. **STRPCO**
2. **STRPCCMD PCCMD(IEXPLORE)**

For Distribution A+ GUI Users, the users' browser will determine which application to launch based on the extension of the files. Please refer to your browser documentation to determine how different files are opened from within a browser.

Use this option to deactivate the debug file export process for this session. See CHAPTER 13: *Start Debug File Export* for details.

Deactivate the debug file export process through the End Debug File Export option on the PC File Export Menu (MENU EXMAIN). Upon selecting this menu option, the following message displays:

File Export is no longer in debug mode for this session. Press Enter to Continue.

Upon pressing **ENTER**, the start debug function will be deactivated. The debug process will also be automatically ended for your session when you sign off.

Use this option to view PC files which have been previously exported.

Previously exported PC files may be viewed through the PC File Exports Inquiry option on the PC File Export Menu (MENU EXMAIN). The export location is defined through CHAPTER 12: *PC File Export Options*.

PC File Export Inquiry

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
PC File Export Inquiry Screen	Use to view PC files which have been previously exported.

PC File Export Inquiry Screen

PC FILE EXPORT INQUIRY			
User ID	File Name	Date	Ext
_ APDEMO	O E Hold Code List_080663	11/17/09	HTM
.. APDEMO	Tax Body List_080663	11/17/09	RTF

		Last	
<u>Actions</u>	<u>Limits:</u>		
4=Delete	User ID:	APDEMO.....	
5=Display	File Name:	.....
	Date:	From:	To:
F3=Exit F5=Refresh			

This screen displays after selecting option **10** - PC File Export Inquiry (MENU EXMAIN). The top portion of this screen displays the previously exported PC file(s) for the User ID identified, the date the file was exported, and the file type. The bottom portion of this screen is used to limit the exported PC files to a particular user, file name, and/or date range. You also can select to use the **Actions** field to delete or display an existing exported PC file.

Refer to the Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

PC File Export Inquiry Screen Fields and Function Keys

Field/Function Key	Description
Actions	<p>Actions may only be performed on previously exported PC files displaying on the top portion of this screen. Use this field to delete or display an existing exported PC file.</p> <p>Key 4 prior to the User ID field of the file you want to delete and press ENTER. The file will be deleted.</p> <p>Key 5 prior to the User ID field of the file you want to display and press ENTER. The Open With Selection Screen displays. Refer to the Cross Applications User Guide for information on this screen.</p> <p>(N 1,0) Optional</p>

PC File Export Inquiry Screen Fields and Function Keys

Field/Function Key	Description
Limits: User ID	<p>This field allows you to restrict the information that displays on the top portion of this screen to a specific User ID.</p> <p>Key all or part of the user ID associated with the PC exported files you want to view. You can key any registered user ID defined through Register A+ User IDs (MENU XACFIG).</p> <p>(A 10) Optional</p>
Limits: File Name	<p>This field allows you to restrict the information that displays on the top portion of this screen according to specific file name.</p> <p>Key all or part of a file name you want to inquire on. Exported PC files that match the criteria you entered will display.</p> <p>(A 50) Optional</p>
Limits: Date	<p>This field allows you to restrict the information that displays on the top portion of this screen according to specific from/to date range.</p> <p>Key the date or range of dates associated with the PC exported files you want to inquire on.</p> <p>(A 10 / A 50 / 2 @ N 6,0) Optional</p>
F3=Exit	Press F3=EXIT to return to the menu.
F5=Refresh	After you have entered criteria in the Limits fields, press F5=REFRESH to refresh the information displayed on this screen.
Enter	Press ENTER after you have selected an action to perform (delete or display) to confirm your selection.

Application Mail allows messages to be sent to and received by any user defined through Register A+ User IDs (MENU XACFIG). This appendix contains information about this feature and the screens associated with it.

Application Mail Messages

There are two types of messages that can be sent by Application Mail:

- user (U)
- alert (A)

User Messages

User messages are those messages composed and sent by one user to other users. Messages can be sent as either high, normal, or low priority.

Alert Messages

Alert messages are special messages sent by Distribution A+. This type of message is only available if you have Workflow Management installed. Refer to the Workflow Management manual for more information about alert messages.

Message Statuses

This section describes all the possible message statuses. You can review the status of your messages on the Application Mail - Received/Sent Messages Screen (p. A-6).

The status

- **NEW** displays for messages you have received but not read
 - **OPN** displays for user messages that you have read
 - **RPL** displays for the saved copies of user messages to which you sent a reply. This status will not display if the **Number of days to keep sent messages** field is set to 0 through System Options
-

Maintenance (MENU XAFILE) or on the Application Mail -Settings Screen (p. A-27) for your user ID.

- **FOR** displays for the saved copies of user messages that you forwarded. This status will not display if the **Number of days to keep sent messages** field is set to **0** through System Options Maintenance (MENU XAFILE) or on the Application Mail -Settings Screen (p. A-27) for your user ID.
- **SNT** displays for the saved copies of messages that you created and sent. This status will not display if the **Number of days to keep sent messages** field is set to **0** through System Options Maintenance (MENU XAFILE) or on the Application Mail -Settings Screen (p. A-27) for your user ID.
- **DEL** displays for messages that you deleted. This status will not display if the **Number of days to keep deleted messages** field is set to **0** through System Options Maintenance (MENU XAFILE) or on the Application Mail -Settings Screen (p. A-27) for your user ID.

There are additional message statuses for Workflow Management. If you have Workflow Management installed, the status

- **DLG** displays for messages that you delegated to another user
- **DFR** displays for messages that you deferred
- **ACK** displays for messages that you acknowledged
- **ESC** displays for messages that have been escalated

Functions of Application Mail

For user messages, you can

- review a list of received messages
- review a list of sent messages
- display a received or sent message in detail
- print messages
- delete messages
- create and send messages
- reply to received messages
- forward received messages

In addition, you can set your user settings for Application Mail.

If you have Workflow Management installed you can receive alert messages. In addition to the functionality of user messages, with alert messages you can

- delegate messages
- defer messages
- acknowledge messages
- access application functions using links embedded in the message

Application Mail Settings

System settings for Application Mail are defined through System Options Maintenance (MENU XAFILE). You can specify the number of days to keep deleted messages and the number of days to keep sent messages.

These same settings can also be defined for each user on the Application Mail -Settings Screen (p. A-27). Users can also specify whether they want a break message to be sent to themselves to indicate that a new interrupt message has been received.

Purging Saved Messages

If messages are being saved for a user, based on the user settings defined on the Application Mail - Settings Screen (p. A-27), messages older than the number of days specified will be purged automatically each time that user accesses Application Mail.

Sent messages are purged if the sent date or reply date (the date you sent the message or the date you sent a reply to a message) plus the value specified as the number of days to keep sent messages is less than or equal to the current date (today's date). Deleted messages are purged if the date they were marked for deletion plus the value specified as the number of days to keep deleted messages is less than or equal to the current date (today's date).

Accessing Application Mail

You can access Application Mail

- by pressing **F5=MAIL** on the Informational Message Screen (p. A-5)
- by pressing **F15=MAIL** on a pop-up menu. If you are using pop-up menus, Msg will appear in the upper right-hand corner of the screen to indicate that you have new messages.
- by keying **apmail ENTER** on the command line
- selecting the Amail Inquiry (MENU MGMAIN) option in the Workflow Management module

In addition, if the **Inform about new interrupt messages** field is set to **Y** on the Application Mail - Settings Screen (p. A-27) and you receive an interrupt message, the System i Work with Messages Screen will appear to inform you that you have received an interrupt message.

Application Mail

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Informational Message Screen	Use to select to review your messages or continue to sign on.
Application Mail - Received/Sent Messages Screen	Use to review the type of message, status of the message, message priority, and subject of the message
Application Main - Read Screen	Use to review the text of the message.
Function Group Processing Screen	Use to select the hyperlinks that you want to process and how to process them.
Application Mail - New Message / Reply / Forward Screen	Use to compose and send a new message.
Application Mail Delegate Screen	Use to specify to whom the alert message should be delegated.
Application Mail Display Users Screen	Use to view all the users that received a specific message.
Application Mail - Message View Limits Screen	Use to specify limits to filter the messages that display on that screen.
Application Mail -Settings Screen	Use to specify the settings for your user ID.
Select Users Screen	Use to select the recipients of your message.

Informational Message Screen



If you have any new messages, this screen appears after you sign on to Distribution A+. You can select to review your messages or continue to sign on.

Informational Message Screen Function Keys

Field/Function Key	Description
F5=Access your Mail	Press F5=ACCESS YOUR MAIL to access Application Mail. The Application Mail - Received/Sent Messages Screen (p. A-6) will appear.
Enter	Press ENTER to bypass accessing your messages and continue to sign on to Distribution A+.

Application Mail - Received/Sent Messages Screen

Application Mail - Received Messages						LIMITS ARE ACTIVE
TP	Sta	Pr	From	Subject	Received Date/Time	
-	U	NEW	N APLUS Demo User	Staff meeting today	11/02/10 10:11:55 am	
						Last
Actions: 1=View, 2=Delete, 3=Print						
F2=Expand "Subject" F3=Exit F5=Refresh F6=New Message F24=More Keys						

This screen appears after you

- press **F5=MAIL** on the Informational Message Screen (p. A-5)
- press **F15=MAIL** on a pop-up menu
- key **apmail** [Enter] on the command line
- select Amail Inquiry (MENU MGMAIN)

Whether received messages or sent messages display on this screen is determined by the **F2=EXPAND SUBJECT** function key on the Application Mail - Message View Limits Screen (p. A-23). You can also use that screen to specify the types of received and sent messages that you want to appear.

For both received and sent messages, you can review the:

- type of message
- status of the message
- message priority
- subject of the message

For received messages, the name of the user who sent the message and the date and time the message was received will display. In addition, an exclamation mark (!) will display beside interrupt messages. For alert messages, ***ALERT** will display in the From column. For sent messages, the user to whom you sent the message and the sent date and time will display.

For received and sent messages you can

- view the message in detail
- delete the message
- print the message

Using the function keys on this screen, you can

- toggle the subject and recipient columns
- refresh the screen
- create a new message
- delete all of your messages
- clear deleted messages
- change the criteria for what type of messages appear (limits)
- specify your Application Mail settings

If limits are specified on the Application Mail - Message View Limits Screen (p. A-23), **LIMITS ARE ACTIVE** will appear in reverse image in the top-right corner of this screen.

NOTE: This is a roll screen. Refer to the section on Roll Screens in the Cross Applications User Guide for further information.

Application Mail - Received/Sent Messages Screen Fields and Function Keys

Field/Function Key	Description
(Actions)	<p>Use this field to specify an action for the message. You can view, delete, and print your messages.</p> <p>Key 1 to view the message. The Application Main - Read Screen (p. A-9) will appear.</p> <p>Key 2 to delete the message. You cannot delete new messages or deferred alert messages. Deleted messages can be saved for a certain number of days, based on your user settings, specified on the Application Mail -Settings Screen (p. A-27).</p> <p>Key 3 to print the message. The Report Options Screen will appear. Refer to the Corss Applications User Guide for information on this screen.</p> <p>(A 1) Optional</p>
F2=Expand "Subject" / Expand "From/Recipient" / Default View	<p>The F2=EXPAND "SUBJECT" / F2=EXPAND "FROM/RECIPIENT" / F2=DEFAULT VIEW function key allows you to toggle between displaying</p> <ul style="list-style-type: none"> • an expanded Subject column without the From/Recipient column • an expanded From/Recipient column without the Subject column • both the Subject and the From/Recipient column with truncated entries <p>Press F2=EXPAND "SUBJECT" / F2=EXPAND "FROM/RECIPIENT" / F2=DEFAULT VIEW to vary the columns on the screen.</p>
F3=Exit	Press F3=EXIT to leave Application Mail and return to Distribution A+.
F5=Refresh	Press F5=REFRESH to update the messages that display on this screen. Any messages that you have received since you accessed Application Mail will appear.

Application Mail - Received/Sent Messages Screen Fields and Function Keys

Field/Function Key	Description
F6=New Message	Press F6=NEW MESSAGE to create a new message. The Application Mail - New Message / Reply / Forward Screen (p. A-14) will appear.
F9=Delete All	Press F9=DELETE ALL to delete all of your messages. Messages with status NEW or DFR cannot be deleted. If you want to delete only messages with a deleted status (DEL), use the F10=CLEAR DELETED MESSAGES function key.
F10=Clear Deleted Messages	Press F10=CLEAR DELETED MESSAGES to remove messages with a deleted status (DEL).
F11=Limits	Press F11=LIMITS to review or change the limits that determine what information displays on this screen. The Application Mail - Message View Limits Screen (p. A-23) will appear.
F13=Settings	Press F13=SETTINGS to review or change the settings for your user ID. The Application Mail -Settings Screen (p. A-27) will appear.
F24=More Keys	Press F24=MORE KEYS to display additional function keys.
Enter	<p>After you specify an action for a message (view, delete, or print), press ENTER to confirm your entry.</p> <p>If the action was</p> <ul style="list-style-type: none">• 1 to view, the Application Main - Read Screen (p. A-9) will appear.• 2 to delete, the messages you selected to delete will be removed (if deleted messages are not being saved) or changed to status DEL. Messages with changed to status DEL will be purged based on the defined number of days to keep deleted messages. If the status of the message was DEL, it will be removed immediately.• 3 to print, the The Report Options Screen will appear. Refer to the Corss Applications User Guide for information on this screen.

Application Main - Read Screen

The screenshot shows a terminal window titled "Application Mail - Read". The message details are as follows:

```

Priority: H      Interrupt: Y
Received: 9/29/10 4:12:02 pm
From: *ALERT
To:
CC:
Subject: PO Approval Required Env: GZ Ref:GN105/G1040
  
```

The following requisition(s) require approval from buyer 103:

Requisition Inquiry 01-100-S00111
 Enter/Change Requisitions Link 01-S00111

At the bottom, there are function keys: F4=Acknowledge, F6=Defer, F15=Delegate, and F11=Print. The word "Last" is positioned to the right of these keys.

This screen appears after you select to view a message on the Application Mail - Received/Sent Messages Screen (p. A-6) and press **ENTER**.

This screen displays the text of the message. The following information also displays for the message:

- priority
- whether the message is an interrupt message
- any action taken on the message and when
- date and time the message was received
- recipients
- carbon copy recipients
- subject

Both user and alert messages can be printed from this screen. For user messages, you can reply, delete, and forward the message.

For alert messages, you must acknowledge, defer, or delegate the message. If the alert message includes links, you can access the Distribution A+ function from this screen by selecting the link with your cursor and pressing **ENTER**.

NOTE: To double-click the hyperlink of a Workflow Alert message, the user's IBM Client Access session must allow Macro Hotspots and Point and Select Enter at cursor position functionality. Hotspots setup can be found through **Edit > Preferences > Hotspots**.

Application Mail - Read Screen Function Keys

Field/Function Key	Description
F2=BCC/CC / F2=Function Group Processing	<p>If Workflow Management is installed and this message is an alert message containing multiple hyperlinks of the same type, this function key appears as F2=FUNCTION GROUP PROCESSING; otherwise this function key appears as F2=BCC/CC.</p> <p>F2=BCC/CC: Press F2=BCC/CC to toggle between displaying carbon copy recipients and blind carbon copy recipients for sent messages.</p> <p>F2=FUNCTION GROUP PROCESSING: If the alert message contains multiple hyperlinks of the same type, position your cursor over one of the hyperlinks and press F2=FUNCTION GROUP PROCESSING to process the hyperlinks of that type at the same time. The Function Group Processing Screen (p. A-12) will appear.</p>
F4=Acknowledge	<p>The F4=ACKNOWLEDGE function key appears only if you have Workflow Management installed and the selected message is an alert message.</p> <p>Press F4=ACKNOWLEDGE to acknowledge this message. The message status will be changed to ACK. Acknowledging a message indicates that you are taking responsibility for the alert message and prevents it from being escalated. Refer to the Workflow Management User Guide for more information about escalation.</p>
F5=Reply	<p>The F5=REPLY function key appears only for user messages.</p> <p>Press F5=REPLY to compose a reply to this message. The Application Mail - New Message / Reply / Forward Screen (p. A-14) will appear.</p>
F6=Defer	<p>The F6=DEFER function key appears only if you have Workflow Management installed and the selected message is an alert message.</p> <p>Press F6=DEFER to defer this message. The message status will be changed to DFR. Deferring a message indicates that you are taking additional time to consider the message before either acknowledging or delegating it. Deferred messages can be escalated. Refer to the Workflow Management manual for more information about escalation.</p>
F9=Delete	<p>The F9=DELETE function key appears only for user messages.</p> <p>Press F9=DELETE to delete the message. Deleted messages will be available to review until they are purged by the system if the number of days to keep deleted messages is greater than 0 for your user settings. If the message status is DEL, it will be removed immediately. You can specify your settings on the Application Mail -Settings Screen (p. A-27). The system settings are specified through System Options Maintenance (MENU XAFILE).</p>
F11=Print	<p>Press F11=PRINT to print the message. The Report Options Screen will appear. Refer to the Cross Applications User Guide for information on this screen.</p>

Application Mail - Read Screen Function Keys

Field/Function Key	Description
F12=Return	The F12=RETURN function key appears only for user messages. Press F12=RETURN to return to the Application Mail - Received/Sent Messages Screen (p. A-6).
F13=Forward	The F13=FORWARD function key appears only for user messages. Press F13=FORWARD to forward this message to another recipient. The Application Mail - New Message / Reply / Forward Screen (p. A-14) will appear.
F15=Delegate	The F15=DELEGATE function key appears only if you have Workflow Management installed and the selected message is an alert message. Press F15=DELEGATE to delegate this message to another user. The Application Mail Delegate Screen (p. A-18) will appear.
F16=To Users	The F16=TO USERS function key appears only for user messages. Press F16=TO USERS to view all the users that received this message in the To , CC , or BCC fields. The Application Mail Display Users Screen (p. A-21) will appear.
Enter	If Workflow Management is installed and the selected message is an alert message that has embedded links, position your cursor on the link and press ENTER to activate the link in the alert message.

Function Group Processing Screen

```

FUNCTION GROUP PROCESSING

FUNCTION: 0422   Req/PO Inquiry
Sel  Link Information
-    01-100-PAL2
..   01-100-PAL2
..   01-100-PAL3
..   01-100-PAL3
..   01-100-PAL4
..   01-100-PAL4
..   01-100-STEVE1
..   01-100-S00091
..   01-100-S00091
..   01-100-S00091
..   01-100-S00102
..   01-100-100049
..   01-100-100049
..   01-100-100049
..   01-100-100099

X=Select                                     More...

F4=Process First    F5=Process All    F12=Return

```

This screen appears after you position your cursor on a hyperlink in an alert message on the Application Main - Read Screen (p. A-9) and press the **F2=FUNCTION GROUP PROCESSING** function key. Use this screen to select the hyperlinks that you want to process and how to process them. A list of hyperlinks from the alert message display on this screen. To mark a hyperlink for processing, key an **X** in the **Sel** field. Once you begin to process the marked hyperlinks, you cannot unmark a hyperlink for processing unless you press the **F2=FUNCTION GROUP PROCESSING** function key.

Function Group Processing Screen Fields and Function Keys

Field/Function Key	Description
Sel	Use this field to mark a hyperlink for processing. Key X beside a hyperlink to mark it for processing. (A 1) Optional
F2=Change Selection	The F2=CHANGE SELECTION function key appears only after you have processed one or more hyperlinks from the list. Press F2=CHANGE SELECTION to change the hyperlinks that you have marked for processing.

Function Group Processing Screen Fields and Function Keys

Field/Function Key	Description
F4=Process First/ F4=Process Next	<p>The F4=PROCESS FIRST / F4=PROCESS NEXT function key appears as F4=PROCESS NEXT only after you have processed one or more hyperlinks from the list; otherwise, it appears as F4=PROCESS FIRST.</p> <p>Press F4=PROCESS FIRST to process only the first hyperlink in the list. Once you process the hyperlink, you will be returned to this screen.</p> <p>If you have marked hyperlinks in the list for processing, press F4=PROCESS NEXT to process the next marked hyperlink. If you have not marked hyperlinks in the list for processing, press F4=PROCESS NEXT to process the hyperlink that follows the one you just processed in the list. Once you process the next hyperlink, you will be returned to this screen.</p>
F5=Process All/ F5=Process Remaining	<p>The F5=PROCESS ALL / F5=PROCESS REMAINING function key appears as F5=PROCESS REMAINING if you have processed one or more hyperlinks from the list; otherwise, this function key appears as F5=PROCESS ALL.</p> <p>If you have marked hyperlinks in the list for processing, press F5=PROCESS ALL to process all marked hyperlinks without being returned to this screen after each hyperlink is processed. If you have not marked hyperlinks in the list for processing, press F5=PROCESS ALL to process all hyperlinks in the list without being returned to this screen after each hyperlink is processed.</p> <p>If you have marked hyperlinks in the list for processing, press F5=PROCESS REMAINING to process the rest of the marked hyperlinks without being returned to this screen after each hyperlink is processed. If you have not marked hyperlinks in the list for processing, press F5=PROCESS REMAINING to process the rest of the hyperlinks in the list without being returned to this screen after each hyperlink is processed.</p>
F12=Return	Press F12=RETURN to return to the previous screen.

Application Mail - New Message / Reply / Forward Screen

```
Application Mail - New Message
Interrupt: N
Priority: N      (H,N,L)
To? ..
CC? ..
Subject: .....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....
F2=BCC                        F5=Send                Last
                                F12=Return
```

This screen view appears after you press the **F6=NEW MESSAGE** function key on the Application Mail - Received/Sent Messages Screen (p. A-6) to compose a new message.

Application Mail - Reply Screen

[illegible]

This screen appears after you press the **F5=REPLY** function key on the Application Main - Read Screen (p. A-9) to reply to a message.

Application Mail - Forward Screen

[illegible]

This screen appears after you press the **F13=FORWARD** function key on the Application Main - Read Screen (p. A-9) to forward a message.

Use this screen to compose and send a new message. You can specify:

- the message priority
- whether the message will interrupt the recipient
- recipients
- carbon copy recipients
- blind carbon copy recipients
- a subject for the message
- message text

If you are replying to or forwarding a message, some of this information will already be provided from the original message. For example, if you are replying to a message, the name of the sender of the original message appears in **To** field.

Application Mail - New Message / Reply / Forward Screen Fields and Function Keys

Field/Function Key	Description
Priority	<p>Use this field to specify the priority of the message.</p> <p>Key H if this message is of high priority.</p> <p>Key N if this message is of normal priority.</p> <p>Key L if this message is of low priority.</p> <p><i>Default Value:</i> L</p> <p>(A 1) Required</p>
Interrupt	<p>Use this field to specify whether this message should interrupt its recipients.</p> <p>Key Y to interrupt the recipients when this message is delivered. A break message will be sent to the recipients, unless the Interrupt field on the Application Mail -Settings Screen (p. A-27) is set to N for that recipient.</p> <p>Key N if you do not want this message to interrupt its recipients when it is delivered.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
To	<p>Use this field to specify the recipients for this message.</p> <p>Key ? in this field and press ENTER. The Select Users Screen (p. A-29) will appear.</p> <p><i>Default Value:</i> If you pressed F5=REPLY to reply to a message, the sender of that message.</p> <p><i>Valid Values:</i> ?</p> <p>(A 1) Required</p>
CC / BCC	<p>This field will display as CC or BCC, based on your selection with the F2=BCC / F2=CC toggle key.</p> <p>Use the CC field to specify carbon copy recipients for the message. Use the BCC field to specify blind carbon copy recipients for the message.</p> <p>Key ? in this field and press ENTER. The Select Users Screen (p. A-29) will appear.</p> <p><i>Valid Values:</i> ?</p> <p>(A 1) Optional</p>
Subject	<p>Use this field to provide a subject heading for the message.</p> <p>Key descriptive text for the content of the message.</p> <p><i>Default Value:</i> If you pressed F5=REPLY to reply to a message, the subject of that message, prefixed with RE:. If you pressed F13=FORWARD to forward a message, the subject of that message, prefixed with FW:.</p> <p>(A 70) Optional</p>

Application Mail - New Message / Reply / Forward Screen Fields and Function Keys

Field/Function Key	Description
(Message Text)	<p>Key the message. Words that are split across the end of a line will be wrapped to the next line. You can use the TAB key to move down one or more lines and the DELETE key to delete text. If you go back to an existing line of text, typing on that line will overwrite the text, unless the INSERT key is active. To display additional lines for the message, use the roll keys.</p> <p>(A 936) Required</p>
F2=BCC / F2=CC	Press the F2=BCC / F2=CC function key to toggle between displaying the CC and the BCC field.
F5=Send	<p>Press F5=SEND to send the message. The</p> <ul style="list-style-type: none"> • Application Main - Read Screen (p. A-9) will appear if you pressed F5=REPLY on that screen to reply to a message or F13=FORWARD to forward a message • Application Mail - Received/Sent Messages Screen (p. A-6) will appear if you pressed F6=NEW MESSAGE on that screen.
F6=View Original Message	<p>The F6=VIEW ORIGINAL MESSAGE function key appears only if you are replying to or forwarding a message.</p> <p>Press F6=VIEW ORIGINAL MESSAGE to view the message that you are replying to or forwarding. The Application Main - Read Screen (p. A-9) will appear.</p>
F12=Return	<p>Press F12=RETURN to return, without sending a message, to the</p> <ul style="list-style-type: none"> • Application Main - Read Screen (p. A-9) if you pressed F5=REPLY on that screen to reply to a message or F13=FORWARD to forward a message • Application Mail - Received/Sent Messages Screen (p. A-6) if you pressed F6=NEW MESSAGE on that screen.

Application Mail Delegate Screen

[illegible]

This screen appears only if you have Workflow Management installed and this message is an alert message. This screen appears after you press the **F15=DELEGATE** function key on the Application Main - Read Screen (p. A-9).

Use this screen to specify to whom the alert message should be delegated. Delegating an alert message assigns the responsibility for the message to the recipient. The user to whom the message is delegated is then responsible for acknowledging or delegating the message before it is escalated. The default escalation recipient for a delegated message is the escalation recipient defined for the user to whom the message is being delegated; however, you can select to be the escalation recipient in the **Escalate to Owner** field.

Application Mail Delegate Screen fields and Function Keys

Field/Function Key	Description
Delegate To	<p>Use this field to specify to whom the alert message should be delegated. You can either select a user from the Select Users Screen (p. A-29) or key the user ID.</p> <p>To select a user from the Select Users Screen (p. A-29), key ? in the first field and press ENTER.</p> <p>To key the user ID, key the user's ID in the second field.</p> <p><i>Default Value:</i> The delegate to user ID defined for your user ID through Register A+ User IDs (MENU XACFIG).</p> <p><i>Valid Values:</i> A user ID defined through Register A+ User IDs (MENU XACFIG).</p> <p>(A 10) Required</p>

Application Mail Delegate Screen fields and Function Keys

Field/Function Key	Description
Alert Message Delivery Type	<p>This field displays how the message will be delivered to the recipient. Messages can be delivered either through Application Mail or through e-mail. You must have the Mail Server module installed to deliver messages through e-mail.</p> <p>AMAIL displays if this message will be delivered via Application Mail.</p> <p>EMAIL displays if this message will be delivered via e-mail.</p> <p><i>Default Value:</i> The delivery type specified for the recipient in the Delegate To field through Register A+ User IDs (MENU XACFIG).</p> <p>Display</p>
Escalation Date (and Time)	<p>Use this field to specify the date and time that the delegated message should be escalated if the recipient specified in the Delegate To field does not acknowledge it. The message cannot be escalated if the Alert Message Delivery Type field is set to EMAIL.</p> <p>Key the date, time, and am or pm.</p> <p><i>Default Value:</i> If the Escalate field is set to Y for this alert message through Alert Tailoring (MENU MGFILE), normal escalation date for the defined escalation period. If the Escalate field is set to N, a date and time two days from the current date and time.</p> <p><i>Valid Values:</i> A future date and time keyed in the date format specified for your user ID in the Default Date Format field in Register A+ User IDs (MENU XACFIG) or, if that field is blank, the date format specified for the system in the Default Date Format field in System Options Maintenance (MENU XAFIELD).</p> <p>(N 6,0; N 4,0; A 2) Required</p>
Escalate to Owner	<p>Use this field to specify whether, if this message is escalated, it should be escalated to you (the sender), instead of the escalation recipient defined for the user in the Delegate To field through Register A+ User IDs (MENU XACFIG). The message cannot be escalated if the Alert Message Delivery Type field is set to EMAIL.</p> <p>Key Y if you want the escalated message sent to you.</p> <p>Key N if you do not want the escalated message sent to you. It will be escalated to the escalation recipient defined through Register A+ User IDs (MENU XACFIG) for the user in the Delegate To field, unless EMAIL is specified in the Alert Message Delivery Type field.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>

Application Mail Delegate Screen fields and Function Keys

Field/Function Key	Description
Temporary Alert Recipient	<p>This field appears only if the user specified in the Delegate To field currently has a temporary recipient specified for their user ID through Register A+ User IDs (MENU XACFIG).</p> <p>This field displays the temporary recipient for the user specified in the Delegate To field. Use the Defer to Temporary Recipient field to specify whether you want the message to be sent to this user instead.</p> <p>Display</p>
Defer to Temporary Recipient	<p>This field appears only if the user specified in the Delegate To field has a temporary recipient specified for their user ID through Register A+ User IDs (MENU XACFIG).</p> <p>Use this field to specify whether you want the user ID in the Temporary Alert Recipient field to receive this delegated message.</p> <p>Key Y to send this message to the temporary recipient. The value in the Delegate To field will be changed to the user ID displayed in the Temporary Alert Recipient field.</p> <p>Key N if you do not want to send this message the temporary recipient. The value in the Delegate To field will remain the same.</p> <p>(A 1) Required</p>
Subject	<p>Use this field to provide a subject heading for the message.</p> <p>Key descriptive text for the content of the message.</p> <p><i>Default Value:</i> The subject of the message being delegated, prefixed with DE:.</p> <p>(A 70) Optional</p>
Notes	<p>Key any notes that you want to accompany the message. Refer to the (Message Text) field on the Application Mail - New Message / Reply / Forward Screen (p. A-14) for more information about keying messages.</p> <p>(A 936) Optional</p>
F5=Delegate	<p>Press F5=DELEGATE to confirm your entries and send the message. The Application Main - Read Screen (p. A-9) will appear.</p>
F6=View Original Message	<p>Press F6=VIEW ORIGINAL MESSAGE to view the message that you are delegating. The Application Main - Read Screen (p. A-9) will appear.</p>
F12=Return	<p>Press F12=RETURN to return the Application Main - Read Screen (p. A-9) without delegating the message.</p>

Application Mail Display Users Screen

DISPLAY USERS			ALL USERS
	User	Name	Send Type
1	APDEMO	APLUS Demo User	TO

Last

F2=Show To F12=Return

This screen appears after you press the **F16=TO USERS** function key on the Application Main - Read Screen (p. A-9). Use this screen to review the list of users to whom the message was sent on the **To**, **CC**, and **BCC** fields. The **BCC** users will only display if you are the user that sent the original email.

Application Mail Display Users Screen Fields and Function Keys

Field/Function Keys	Description
User	<p>Use this field to specify to whom the alert message should be delegated. You can either select a user from the Select Users Screen (p. A-29) or key the user ID.</p> <p>To select a user from the Select Users Screen (p. A-29), key ? in the first field and press ENTER.</p> <p>To key the user ID, key the user's ID in the second field.</p> <p><i>Default Value:</i> The delegate to user ID defined for your user ID through Register A+ User IDs (MENU XACFIG).</p> <p><i>Valid Values:</i> A user ID defined through Register A+ User IDs (MENU XACFIG).</p> <p>(A 10) Required</p>

Application Mail Display Users Screen Fields and Function Keys

Field/Function Keys	Description
Name	<p>This field displays how the message will be delivered to the recipient. Messages can be delivered either through Application Mail or through e-mail. You must have the Mail Server module installed to deliver messages through e-mail.</p> <p>AMAIL displays if this message will be delivered via Application Mail.</p> <p>EMAIL displays if this message will be delivered via e-mail.</p> <p><i>Default Value:</i> The delivery type specified for the recipient in the <i>Delegate To</i> field through Register A+ User IDs (MENU XACFIG).</p> <p>Display</p>
Send Type	<p>Use this field to specify the date and time that the delegated message should be escalated if the recipient specified in the Delegate To field does not acknowledge it. The message cannot be escalated if the Alert Message Delivery Type field is set to EMAIL.</p> <p>Key the date, time, and am or pm.</p> <p><i>Default Value:</i> If the Escalate field is set to Y for this alert message through Alert Tailoring (MENU MGFILE), normal escalation date for the defined escalation period. If the Escalate field is set to N, a date and time two days from the current date and time.</p> <p><i>Valid Values:</i> A future date and time keyed in the date format specified for your user ID in the Default Date Format field in Register A+ User IDs (MENU XACFIG) or, if that field is blank, the date format specified for the system in the Default Date Format field in System Options Maintenance (MENU XAFIELD).</p> <p>(N 6,0; N 4,0; A 2) Required</p>
F2=Show To / Show CC / Show BCC / Show All	<p>Press the F2=SHOW TO / F2=SHOW CC / F2=SHOW BCC / F2=SHOW ALL function key to toggle the display of users to only those the message was primarily sent to, only those that were copied in the CC or BCC fields, or all users. The F2=SHOW BCC only displays for the original user that sent the message.</p>
F12=Return	<p>Press F12=RETURN to return the Application Main - Read Screen (p. A-9) without delegating the message.</p>

Application Mail - Message View Limits Screen

Application Mail - Message View Limits

Received Messages: Y OR Sent Messages:

User Messages:

- New: Y
- Saved: Y
- Deleted: ..

Alert Messages:

- New: Y
- Deferred: Y
- Acknowledged: ..
- Delegated: ..
- Escalated: ..
- Deleted: ..

From:

Subject:

Received Date: From: To:

F2=Sent Messages F12=Return

This screen appears after you press **F11=LIMITS** on the Application Mail - Received/Sent Messages Screen (p. A-6). Use this screen to specify limits to filter the messages that display on that screen. The **F2=SENT MESSAGES / F2=RECEIVED MESSAGES** function key allows you to toggle between setting limits for received messages or sent messages.

Application Mail - Message View Limits Screen Fields and Function Keys

Field/Function Key	Description
Received Messages OR Sent Messages	<p>This field indicates whether limits are being specified for received messages or sent messages. Use the F2=SENT MESSAGES / F2=RECEIVED MESSAGES function key to toggle the value in this field.</p> <p>A Y will display for Received Messages if limits are being set for received messages.</p> <p>A Y will display for Sent Messages if limits are being set for sent messages.</p> <p><i>Default Value:</i> Y</p> <p>Display</p>

Application Mail - Message View Limits Screen Fields and Function Keys

Field/Function Key	Description
User Messages	<p>Use this field to specify if user messages will display. Use the F2=SENT MESSAGES / F2=RECEIVED MESSAGES function key to toggle between setting limits for received or sent messages. If you are setting limits for received messages, you can specify which statuses of user messages you want to display.</p> <p>If you are setting limits for Received Messages:</p> <ul style="list-style-type: none">• Key Y for New if you want newly received messages to display; otherwise, leave this field blank.• Key Y for Saved if you want saved messages to display; otherwise, leave this field blank.• Key Y for Deleted if want deleted messages to display; otherwise, leave this field blank. <p>If you are setting limits for Sent Messages:</p> <ul style="list-style-type: none">• Key Y if you want messages to users to display; otherwise, leave this field blank. <p><i>Default Value:</i> Y for Received Messages; Y for New and Saved; blank for Deleted; Y for Sent Messages.</p> <p><i>Valid Values:</i> Y or blank</p> <p>(A 1) Optional</p>

Application Mail - Message View Limits Screen Fields and Function Keys

Field/Function Key	Description
Alert Messages	<p>This field appears only if you have Workflow Management installed.</p> <p>Use this field to specify if alert messages will display. Use the F2=SENT MESSAGES / F2=RECEIVED MESSAGES function key to toggle between setting limits for received or sent messages. If you are setting limits for received messages, you can specify which statuses of alert messages you want to display.</p> <p>If you are setting limits for Received Messages:</p> <ul style="list-style-type: none"> • Key Y for New if you want newly received alert messages to display; otherwise, leave this field blank. • Key Y for Deferred if you want alert messages that you deferred to display; otherwise, leave this field blank. • Key Y for Acknowledged if you want alert messages that you acknowledged to display; otherwise, leave this field blank. • Key Y for Delegated if you want alert messages that you delegated to display; otherwise, leave this field blank. • Key Y for Escalated if you want alert messages that have been escalated to display; otherwise, leave this field blank. • Key Y for Deleted if you want alert messages that you deleted to display; otherwise, leave this field blank. <p>If you are setting limits for Sent Messages:</p> <ul style="list-style-type: none"> • Key Y if you want alert messages from Workflow Management that you have delegated to display; otherwise, leave this field blank. <p><i>Default Value:</i> Y for Received Messages; Y for New and Deferred, blank for Acknowledged, Delegated, Escalated, Deleted; Y for Sent Messages.</p> <p><i>Valid Values:</i> Y or blank</p> <p>(A 1) Required</p>
From/Sent To	<p>Use this field to specify users from whom messages were received or to whom messages were sent to limit the messages that display.</p> <p>If you are setting limits for Received Messages, key the users from whom you want messages received to display.</p> <p>If you are setting limits for Sent Messages, key the users for whom you want messages sent to display.</p> <p><i>Valid Values:</i> All or part of a user's name or user ID defined through Register A+ User IDs (MENU XACFIG).</p> <p>(A 70) Optional</p>
Subject	<p>Use this field to limit the messages that display based on the subject.</p> <p>Key all or part of a subject.</p> <p>(A 70) Optional</p>

Application Mail - Message View Limits Screen Fields and Function Keys

Field/Function Key	Description
Received Date/Sent Date	<p>Use this field to key a date or a range of dates for which you want messages to display.</p> <p><i>Valid Values:</i> A date keyed in the date format specified for your user ID in the Default Date Format field in Register A+ User IDs (MENU XACFIG) or, if that field is blank, the date format specified for the system in the Default Date Format field in System Options Maintenance (MENU XAFILE).</p> <p>(2 @ N 6,0) Optional</p>
F2=Sent Messages / Received Messages	<p>Press the F2=SENT MESSAGES / F2=RECEIVED MESSAGES function key to toggle between setting the limits for sent messages and received messages. The Received Messages OR Sent Messages field displays the current selection of this function key.</p>
F12=Return	<p>Press F12=RETURN to return to the Application Mail - Received/Sent Messages Screen (p. A-6) without changing the limits.</p>
Enter	<p>Press ENTER to confirm your entries. The Application Mail - Received/Sent Messages Screen (p. A-6) will appear. Messages that meet the limits you have specified will display.</p>

Application Mail -Settings Screen

Application Mail - Settings

System Settings:

Number of days to keep deleted messages: 000

Number of days to keep sent messages: 000

User Settings:

Number of days to keep deleted messages: _ 0

Number of days to keep sent messages: .. 0

Inform about new interrupt messages: Y (Y/N)

F12=Return

This screen appears after you press the **F13=SETTINGS** function key on the Application Mail - Received/Sent Messages Screen (p. A-6).

Use this screen to specify the settings for your user ID.

Application Mail -Settings Screen Field and Function Keys

Field/Function Key	Description
System Settings	<p>These fields display the number of days specified to keep deleted messages and sent messages through System Options Maintenance (MENU XAFILE). You cannot specify a value in the User Settings fields that is greater than the values that display here.</p> <p>Display</p>
Number of days to keep deleted messages	<p>Key the number of days that you want your deleted messages to be kept. Messages older than the number of days specified here will be purged.</p> <p>Key 0 if you do not want to save deleted messages.</p> <p><i>Valid Values:</i> A number less than or equal to the value specified in the System Settings field for the Number of days to keep deleted messages.</p> <p>(N 2,0) Required</p>

Application Mail -Settings Screen Field and Function Keys

Field/Function Key	Description
Number of days to keep Sent messages	<p>Key the number of days that you want to keep a copy of the messages that you send. Messages older than the number of days specified here will be purged.</p> <p>Key 0 if you do not want to save sent messages.</p> <p><i>Valid Values:</i> A number less than or equal to the value specified in the System Settings field for the Number of days to keep sent messages.</p> <p>(N 2,0) Required</p>
Inform about new interrupt messages	<p>Use this field to specify whether you want messages sent with the Interrupt field set to Y on the Application Mail - New Message / Reply / Forward Screen (p. A-14) to interrupt you.</p> <p>Key Y if you want new interrupt messages to provide an interrupt message. You will receive a break message when interrupt mail arrives.</p> <p>Key N if you do not want new interrupt messages to provide a break message.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required</p>
F12=Return	<p>Press F12=RETURN to return to the Application Mail - Received/Sent Messages Screen (p. A-6) without saving your entries.</p>
Enter	<p>Press ENTER to confirm your entries. The Application Mail - Received/Sent Messages Screen (p. A-6) will appear.</p>

Select Users Screen

Sel	User	Name	Dept
-	APDEM009	APLUS Demo User	System
..	APDEM010	APLUS Demo User	System
..	APLUS	APLUS Demo User	System
..	QPGMR	Programmer and Batch User	System
..	QSECOFR	Security Officer	System

X=Select Find(F6): F6=Find F12=Return

This screen appears after you press **ENTER** on the Application Mail - New Message / Reply / Forward Screen (p. A-14) or the Application Mail Delegate Screen (p. A-18), if you keyed **?** in the **To**, **CC**, or **BCC** fields.

The screen lists the user ID, name, and department of all users. Users are listed by department, and then by name within each department. Use this screen to select the recipients of your message. You can use the **Find** field to quickly locate a specific user.

Select Users Screen Fields and Function Keys

Field/Function Key	Description
Sel	<p>Use this field to select the users that will receive this message.</p> <p>Key X in the Sel field corresponding to the all of the users that you want to include in the message. You can only select one user for the Application Mail Delegate Screen (p. A-18) fields.</p> <p>(A 1) Required</p>
Find	<p>This field allows you to search for a specific user by keying all or part of the user's name (not the user's ID).</p> <p>Key the search characters and press F6=Find.</p> <p>(A 25) Optional</p>
F6=Find	<p>After keying search criteria in the Find field, press F6=Find to begin the search. The cursor will be positioned to the first user that matches your entry. Press F6=Find again to find the next match.</p>

Select Users Screen Fields and Function Keys

Field/Function Key	Description
F12=Return	Press F12=RETURN to return to the Application Mail - New Message / Reply / Forward Screen (p. A-14) without making a selection.
Enter	Press ENTER to confirm your selections. The Application Mail - New Message / Reply / Forward Screen (p. A-14) will appear and the users you selected will be listed to the right of the To , CC , or BCC field.

This appendix explains Mail Server screens that can be accessed through multiple Distribution A+ options for emailing reports/listings or exporting them to various mediums.

Email Options

Emailing provides the functionality to generate a report and/or special form and have it send directly to another user in addition to a printed hard copy or instead of a printed copy.

Export Options

Report exports provide you with the ability to selectively export a standard report to Internet Explorer, Microsoft Word, Microsoft Excel, Notepad or Wordpad. Additional criteria are available for the specific program selected. Refer to *CHAPTER 12: PC File Export Options* for a list of the reports that support Excel TSV Exports.

Email Options Screen

EMAIL OPTIONS			
FROM Address:	prospectmanager@infor.com		
TO Address?	karen_smith@petaluma.school		
Compress:	N (Y,N)	Password Protect:	N (Y,N)
Priority:	L (H,L)	Attachment Name:	Customer Quote
CC Address?			
BCC Address?			
Subj:	Customer Quote		
Body:			
F12=Return			

This screen appears when you select to resend or display a Mail Server request from the Mail Server Inquiry (MENU MSMAIN) and when you press **ENTER** on the Report Options Screen, if either of the following is true:

- The document you are printing has been set up through Customer/Ship to Master Maintenance (MENU ARFILE) or Vendors Maintenance (MENU POFILE) to e-mail automatically to the customer or vendor.

NOTE: If FAX is installed and the document is also set up to fax, the Fax Options Screen will appear before this screen.

- You keyed a **Y** in the **EMAIL REPORT** field on the Report Options Screen. Refer to the Cross Applications User Guide for information about the Report Options Screen.

When e-mails are delivered with this screen, the **FROM Address** will default to the **User Email Address** defined through Register A+ User IDs (MENU XACFIG), if any. If that field is blank, and no application (AR, PO, OE, BQ) specific email has been defined, the default will be the **FROM Email Address** defined on the Mail Server Default Email Address Maintenance Screen (p. 10-5).

Additionally, depending on special order options defined through Special Order Options Maintenance (MENU XAFILE), a Purchase Order created through Special Order Processing within Order Entry will have the **User Email Address** of the buyer who is assigned to the vendor on the Purchase Order.

Email Options Screen Fields and Function Keys

Field/Function Key	Description
FROM Address	<p>Key the email address for the sender.</p> <p>The address in the Email Address field on the Mail Server Default Email Address Maintenance Screen (p. 10-5) will default in this field, if the user sending the email does not have a User Email Address defined through Register A+ User IDs (MENU XACFIG) and no application (AR, PO, OE, BQ) default addresses have been entered on the Mail Server Default Email Address Maintenance Screen (p. 10-5).</p> <p>(A 128) Required</p>
TO Address	<p>This field is required if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Key the distribution group code or address to which you want to e-mail the Mail Server request. Separate multiple addresses with a semicolon. For example: addressone@companyname.com;addresstwo@companyname.com</p> <p>If you do not remember the address or distribution group code you want to send to, key a ? in this field to access a list of existing customer, vendor, user, internal, and distribution group e-mail contacts.</p> <p>If the Default TO Address to User Address for Listings & Reports field on the Mail Server System Options Maintenance Screen (p. 10-3) is Y, then this field will be automatically defaulted to the user's email address (if available) that is running the listing or report. The user's email address is defined in the User Email Address field through Register A+ User IDs (MENU XACFIG).</p> <p><i>Valid Values:</i> Any distribution group code defined through Distribution Group Maintenance (MENU MSFILE) or any operational e-mail address.</p> <p>(A 128) Required/Display</p>
Compress	<p>This field is required if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Use this field specify whether the document sent as an e-mail attachment will be compressed.</p> <p>Key Y to compress the attachment.</p> <hr/> <p>NOTE: If you key Y to compress document attachments, the recipient must have standard data compression software or be using an e-mail client that supports compression in order to open the attachment.</p> <hr/> <p>Key N to leave the attachment uncompressed.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required/Display</p>

Email Options Screen Fields and Function Keys

Field/Function Key	Description
Password Protect	<p>This field is required if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Use this field to specify whether the document sent as an e-mail attachment will be password protected. If you select to password protect the document, the recipient will not be able to open the attachment without the password.</p> <p>Key Y to password protect the attachment.</p> <hr/> <p>NOTE: If you key Y to password protect the attachment, then you must also key Y in the Compress field.</p> <hr/> <p>Key N to send the attachment without password protection.</p> <p><i>Default Value:</i> N</p> <p>(A 1) Required/Display</p>
Password	<p>This field is required if you are sending or resending a request or if you keyed Y in the Password Protect field. If you keyed N in the Password Protect field, then you must leave this field blank. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Key a password. The recipient must know the password and key it in order to open the e-mail.</p> <p>(A 10) Required/Blank/Display</p>
Priority	<p>This field is required if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Use this field to assign a priority to the message.</p> <p>Key L to assign a low, or normal, priority.</p> <p>Key H to assign a high priority.</p> <p>Messages with a high priority will be dispatched first by the Mail Gateway Express process. Messages with low priority will be dispatched in order of arrival. The message priority does not affect the order in which the Mail Server Broker processes requests to Mail Gateway Express.</p> <p><i>Default Value:</i> L</p> <p>(A 1) Required/Display</p>

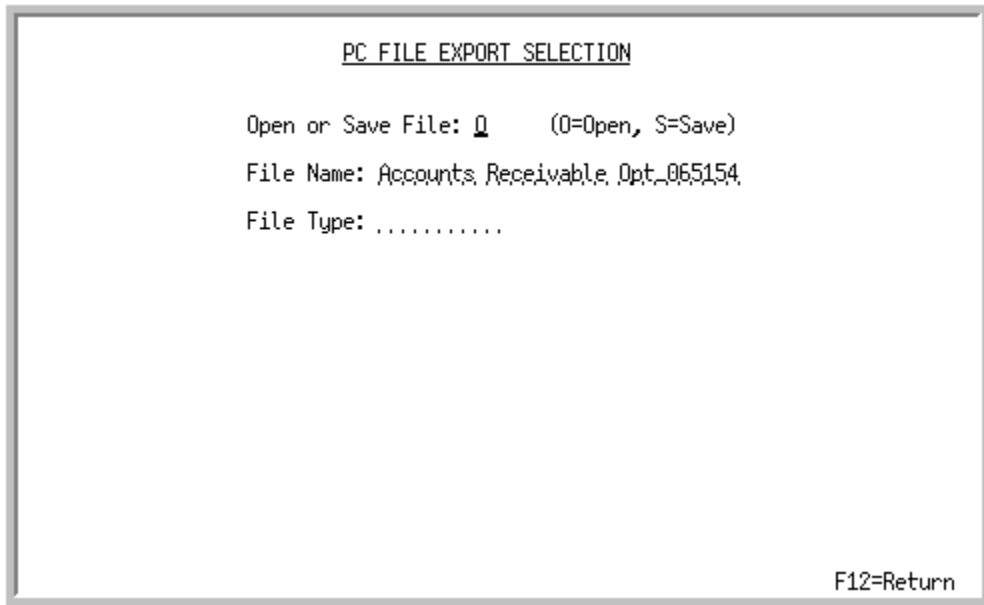
Email Options Screen Fields and Function Keys

Field/Function Key	Description
Attachment Name	<p>This field is required if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Key a name for the attachment.</p> <p><i>Default Value:</i> If the document is set up through Customer/Ship-to Master Maintenance (MENU ARFILE) or Vendors Maintenance (MENU POFILE) to e-mail automatically, the name of the document will default into this field.</p> <p>(A 20) Required/Display</p>
CC Address	<p>This field is optional if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Use this field to send a copy of the attachment to one or more additional addresses.</p> <p>Key a distribution group code or an e-mail address.</p> <p>If you do not remember the address or distribution group code you want to send to, key a ? in this field to access a list of existing customer, vendor, user, internal, and distribution group e-mail contacts. The Personal Email Address Selection Screen (p. 7-4) will appear.</p> <p><i>Valid Values:</i> Any distribution group code defined through Distribution Groups Maintenance (MENU MSFILE) or any operational e-mail address.</p> <p>(A 128) Optional/Display</p>
BCC Address	<p>This field is optional if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Use this field to send a blind copy of the attachment to one or more additional addresses. The name and address of the recipient of a blind copy does not appear when the other recipients view the e-mail message and attachments.</p> <p>Key a distribution group code or an e-mail address.</p> <p>If you do not remember the address or distribution group code you want to send to, key a ? in this field to access a list of existing customer, vendor, user, internal, and distribution group e-mail contacts. The Personal Email Address Selection Screen (p. 7-4) will appear.</p> <p><i>Valid Values:</i> Any distribution group code defined through Distribution Group Maintenance (MENU MSFILE) or any operational e-mail address.</p> <p>(A 128) Optional/Display</p>

Email Options Screen Fields and Function Keys

Field/Function Key	Description
Subj	<p>This field is optional if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Key the text for the subject line of the e-mail.</p> <p>(A 70) Optional/Display</p>
Body	<p>This field is optional if you are sending or resending a request. This field is display-only if you selected to display a request from the Mail Server Inquiry (MENU MSMAIN).</p> <p>Key a message to the recipient of the e-mail.</p> <p><i>Default Value:</i> The body text specified on the Mail Server Company Custom Form Screen (p. 10-9), if any.</p> <p>(A 490) Optional/Display</p>
F12=Return	<p>F12=RETURN only appears when this screen displays from the Report Options Screen or the Mail Server Inquiry.</p> <p>Press F12=RETURN to return to the Mail Server Inquiry Screen (p. 4-2) or the Report Options Screen.</p>
Enter	<p>Press ENTER to confirm your entries and send the request.</p>

PC File Export Selection Screen

A screenshot of a text-based interface titled "PC FILE EXPORT SELECTION". The interface prompts the user to "Open or Save File: Q (O=Open, S=Save)". Below this, it shows "File Name: Accounts Receivable Opt_065154" and "File Type:". In the bottom right corner, it indicates "F12=Return".

```
PC FILE EXPORT SELECTION

Open or Save File: Q      (O=Open, S=Save)
File Name: Accounts Receivable Opt_065154
File Type: .....

F12=Return
```

This screen appears after you press **ENTER** on the Report Options Screen, if you keyed **Y** in the **Export Report** field. Use this screen to:

- Determine if you want to open or save the selected report, form, or listing
- Key the name of the file you want to open or save
- Key the file type/extension to be used when you open or save your selected file (e.g., HTML, RTF, TXT, TSV, etc.)

NOTE: Only one document with the same name/extension can exist in any output directory. Therefore, if an output already exists for this report/document in the output directory with the same name/extension, it will be overwritten by this output. Also, when exporting, for reports that generate two reports, this screen will display twice.

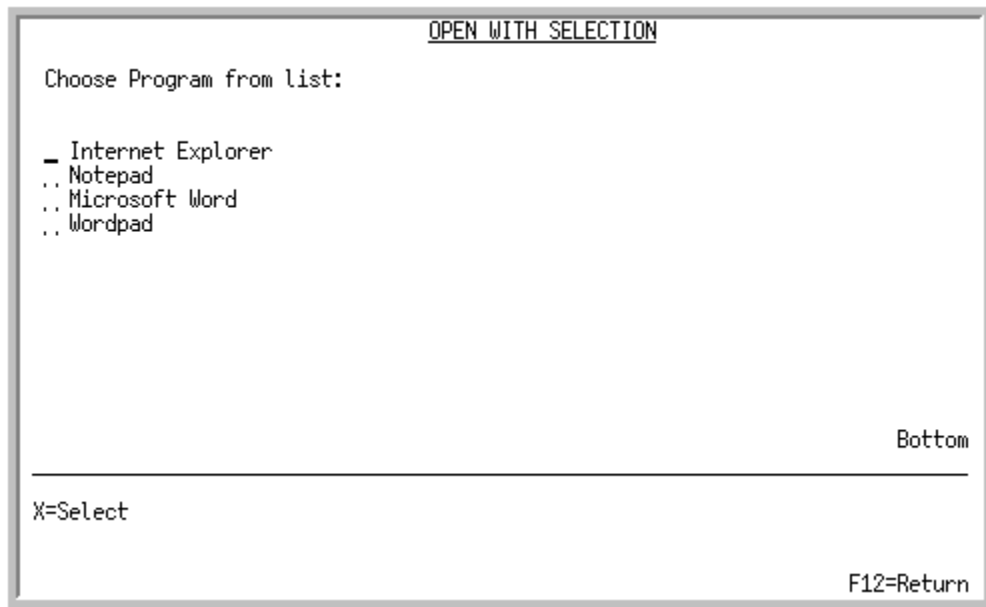
PC File Export Selection Screen Fields and Function Keys

Field/Function Key	Description
Open or Save File	<p>This field determines if you want to open or save the selected report, form, or listing.</p> <p>Key O to open the report, form, or listing. Your file will be saved to the IFS directory (defined in File Export Definition, MENU EXMAIN), and will be opened using the PC Program you select on the Open With Selection Screen (p. B-10). A printed report is not sent to the spooled files output queue.</p> <hr/> <p>NOTE: If the Print Report field and/or Submit to Batch field is Y on the Report Options Screen and this field is O, N will be assumed for those fields even if you keyed Y. When selecting O in this field, in order to open the file, the job should be run interactively (and not in batch). Once the file is opened, you will have the option to print the file. Refer to the Cross Applications User Guide for information on the Report Options Screen.</p> <hr/> <p>Key S to save the report, form, or listing. Your file will be saved to the IFS directory, and you will receive the following message:</p> <p>Your Export has completed. You can view file in the PC File Export Inquiry from either EXMAIN or by Pressing the Attention Key (Esc).</p> <p>Refer to the PC File Export Inquiry Screen (p. 15-2) for further details.</p> <p>Note that, in cases where a report must be processed in batch mode (such as, the ATS Exception Report), S will be assumed in this field and you will not be allowed to change it.</p> <hr/> <p>NOTE: If the Print Report field and/or Submit to Batch field is Y on the Report Options Screen and this field is S, the values you key in those fields will remain and be assumed. Your program will be saved, with the default file type of .TXT in the appropriate folder directory (as defined in File Export Definition, MENU EXMAIN). Refer to the Cross Applications User Guide for information on the Report Options Scree</p> <hr/> <p><i>Default Value:</i> O</p> <p>(A 1) Required</p>

PC File Export Selection Screen Fields and Function Keys

Field/Function Key	Description
File Name	<p>This field displays the external description of the current task you selected. For example, if you selected to run the Purchasing Options Listing, Purchasing_Option_List_731632 will display in this field.</p> <p>The file name comes from Distribution A+ Function security and is conjugated with the IBM i job number assigned when you sign on. The file name cannot contain any special characters.</p> <p>Accept the default or key the name of the file you want to open or save.</p> <hr/> <p>NOTE: This is the file name used when the hard copy is placed in the applicable folder directory. Therefore, if this is a repeated time in your session that you are running the same report, the name will be the same and it will overwrite any previous name output in that folder. If needed, key a unique name to avoid the file being overwritten.</p> <hr/> <p><i>Default Value:</i> The external description of the current task you selected (A 30) Required</p>
File Type	<p>Use this field to key the file type/extension to be used when you open or save your selected file. For example, HTML, RTF, TXT, etc.</p> <hr/> <p>NOTE: Only one document with the same name/extension can exist in any output directory. Therefore, if an output already exists for this report/document in the output directory with the same name/extension, it will be overwritten by this output.</p> <hr/> <p>TSV is only valid for the specific list of reports found in Reports That Support Excel CSV/TSV Exports (p. 12-1).</p> <p>If you key a value in this field and select to open the file (the Open or Save File field is <input type="radio"/>) , the file type you key in this field will be used and not the file type that is defined by the system for the available PC Programs. See the Open With Selection Screen (p. B-10) for further details.</p> <p>If you leave this field blank and select to open the file (the Open or Save File field is <input type="radio"/>) , the default file extension you selected on the Defining File Exports Screen as described in the Mail Server User Guide will be used.</p> <p>(A 10) Optional</p>
F12=Return	Press F12=RETURN to cancel your selections and return to the previous screen.
Enter	Press ENTER to confirm your selections and proceed (what occurs next depends on your selection in the Open or Save File field).

Open With Selection Screen



This screen appears after you press **ENTER** on the PC File Export Selection Screen (p. B-7), if you keyed **O** in the **Open or Save File** field. This screen lists the PC Programs available to open files with. Distribution A+ supports the four programs listed on this screen. You have the option to add additional programs in PC File Export Maintenance. The list of programs displayed is for the current **User ID** and **Display ID** located; if not located, blank is assumed for the **User ID** and **Display ID**.

Use this screen to select the PC Program you want to open the selected file with.

NOTE: For each available program to select, a file type has been defined to be used (for example, RTF, TXT, HTML). If you keyed a file type in the **File Type** field on the PC File Export Selection Screen (p. B-7), regardless of what program you select to open the file with on this screen, the file type you selected on the PC File Export Selection Screen (p. B-7) will be used when the document is opened. The file will also be saved in the appropriate folder with this file type.

NOTE: Microsoft Excel must be set up as a custom entry since all exports are not supported for exporting to Microsoft Excel. Refer to PC File Export Options (MENU EXMAIN) for more information on adding new PC Programs.

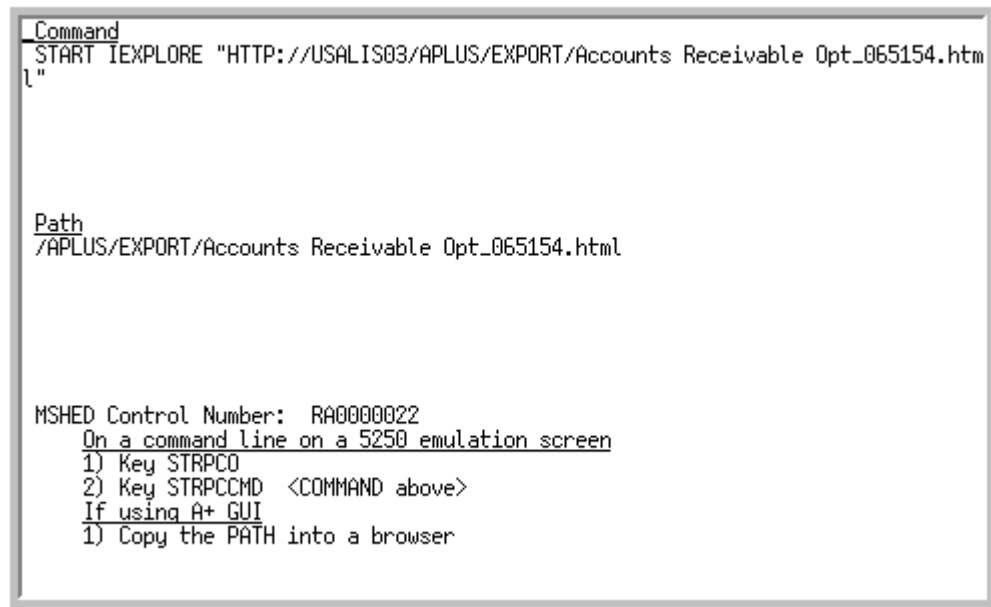
Open With Selection Screen Fields and Function Keys

Field/Function Key	Description
X=Select	Key X before the PC Program you want to open the selected file with (only one PC Program can be selected). For example, if you want to launch the file in a browser, key X before the Internet Explorer field. (A 1) Required

Open With Selection Screen Fields and Function Keys

Field/Function Key	Description
F12=Return	Press F12=RETURN to cancel your selection and return to the previous screen.
Enter	<p>Press ENTER to confirm your selection. Your file will be opened in the selected PC Program.</p> <hr/> <p>NOTE: If you selected to activate the debug file export process through Start Debug File Export (MENU EXMAIN), the Debug File Export Screen (p. B-12) will display instead of your file being opened in the selected program (however, the file will still be saved in the IFS directory). If you did not select to activate the debug file export process, the file would be opened in the selected program and the debug process would be skipped.</p> <hr/>

Debug File Export Screen



This screen appears after you press **ENTER** on the Open With Selection Screen (p. B-10), if you selected to activate the debug file export process through Start Debug File Export (MENU EXMAIN). This screen will display instead of your file being opened in the selected program (however, the file will still be saved in the IFS directory). If you did not select to activate the debug file export process, the file would be opened in the selected program and the debug process would be skipped (that is, this screen would not be displayed).

This screen lists the PC command which is run by the iSeries and the Integrated File System (IFS) path which your document is stored to. Use this screen to locate the command you need to key on a command line to validate that the export is working correctly.

Press **ENTER** once you have located the command. You will be returned to the calling menu.

NOTE: The iSeries has a maximum string length of 123 characters. The total characters for the command, path, file name, and file type, cannot be greater than 123 characters.

Glossary



Attachment	The report, listing, or document that is being e-mailed. Attachments can be compressed and password protected.
Compression	A process that compacts information and reduces the size of a file. You can select to compress attachments. If an attachment is compressed, the recipient must have standard data compression software or be using an e-mail client that supports compression in order to open the attachment.
Distribution Group	Two or more addresses linked to a common name used to mass e-mail to multiple addresses that normally receive the same e-mail. When the code for the distribution group is entered in the TO Address field on the Email Options Screen (p. B-2), the message and attachment are automatically sent to all the addresses assigned to the group code.
Internet Service Provider (ISP)	A company that provides access to the Internet, allowing electronic transmissions via the Internet and connections to Internet sites.
Mail Server Broker	An IBM i process that writes each e-mail, with its attachments, to a rich text file in a directory that is shared with the Mail Gateway Express workstation. E-mail can not be sent if the Broker is not running. The Broker can be started automatically with Distribution A+ or manually. In addition, starting the Broker purges the Mail Server of all requests older than the number of days you set in the Mail Server System Options (MENU MSFILE). The broker must be stopped before the dedicated portion of Day-End processing is run.
Mail Server Request	An e-mail message and one or more attachments that are processed by the Mail Server Broker and delivered via an Internet Service Provider.
Mail Gateway Express	A server product that functions as an intermediary between Distribution A+ modules and one or more Internet Service Providers (ISPs). Mail Gateway Express monitors the Distribution A+ host shared drive, searching for control and attachment files representing outgoing messages generated by Mail Server. Each control file is processed to extract all elements of the outgoing e-mail message (such as e-mail address, message text, and attachments). The outgoing message is then assembled

from the extracted elements and dispatched to an ISP. Messages are dispatched in order of arrival, unless a message has been assigned a high priority.

The final result of the send operation for each outgoing message is recorded in an e-mail status table. Additionally, Mail Gateway Express maintains a number of activity log files that capture all server activities, including maintenance.

- | | |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Password Protection | Protects attachments by requiring a password to open and read the document. E-mail attachments sent with password protection must also be compressed, and the recipient must know the password in order to open the attachment. Refer to the compression definition for additional requirements. |
| Priority | Messages are assigned a high or low priority on the Email Options Screen (p. B-2). Priority functions with the Mail Gateway Express process, not the Mail Server Broker process. Messages with high priority will be dispatched first by Mail Gateway Express, messages of the same priority will be dispatched in order of arrival. |

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