Infor Distribution A+

FAX OVERVIEW

The Facsimile (FAX) module provides an optimum means by which documents may be transmitted between you and your vendors/customers with the speed and accuracy needed in today's business environment. Infor Distribution A+ works with a third-party product to enable the facsimile function, so that your workstation will simulate a fax machine, initiating fax transmissions of selected Distribution iBusiness (A+) documents through your communications line.

This section provides you with information on the following topics:

* Introduction to FAX
* Interfaces
* Distribution iBusiness (A+) Documents that can be faxed
* Faxing/Printing Functions
* Distribution iBusiness (A+) Required File Updates
* Nicknames
* Distribution iBusiness (A+) Cover Sheet and FastFax Cover Sheet
* Access into Quadrant's FastFax Menus

Introduction to FAX

FAX is geared towards reducing the handling and mailing of certain business documents created during order entry or when performing certain accounts receivable, purchasing, or warehouse management tasks.

Faxing a document through Distribution iBusiness (A+) requires only the destination data of the `Fax Phone Number` (or an optional nickname. However, to ensure that the fax is received by the correct person, customer/vendor/warehouse data, including the contact name, can be predefined through Distribution iBusiness (A+).

FAX sends a document as follows:

* Distribution iBusiness (A+) determines which documents are allowed to be processed by FAX.
* Distribution iBusiness (A+) then generates a document that has been selected to be processed via FAX; this initiates the creation of a facsimile in an output queue to be picked up by the facsimile software.
* Third party software processes fax spooled output in facsimile output queue; transmits fax data to the appropriate customer/vendor/warehouse over applicable communication lines.

The process of converting and sending Distribution iBusiness (A+) data through third party software over communication lines to your vendor/customer will need to be mapped and identified for types of files, record layouts, or field definitions needed to interface with Distribution iBusiness (A+).

Interfaces

Through FAX, defaults are established at both the system and the warehouse level which tailor the operation of FAX. Additionally, the Distribution iBusiness (A+) Vendor and Customer/Ship-To Address Master files may be globally updated with fax phone numbers and the names of the contact persons. To fax documents and globally update information, FAX interfaces with Order Entry, Purchasing, and Accounts Receivable. The interface that occurs for each is briefly described below:

Order Entry

The FAX interface with Order Entry allows you to fax documents when performing order processing through MENU OEMAIN. From the End Order Screen during order entry, you may fax Pick Lists (and Shipping Manifests, if applicable), Pack Lists (during shipping confirmation), Invoices or Acknowledgements; Invoices and Acknowledgements may also be faxed through Print Invoices (MENU OEMAIN) or Print Acknowledgements (MENU OEMAIN) if the `Fax (Y/N)` field on the End Order Screen for the respective document is Y. Refer to the Order Entry User Guide for an explanation of the End Order Screen.

Purchasing

The FAX interface with Purchasing allows you to fax documents when performing purchase order processing through MENU POMAIN. From the End Requisition Screen during purchase order entry, you may fax Purchase Orders. You also may fax Purchase Orders from the End Purchase Order Changes Screen during purchase order modification through Req/ PO Inquiry (MENU POMAIN), or from Purchase Orders (MENU POMAIN) if the `Fax (Y/N)` field on the End Order Screen of requisition entry is Y. Refer to the Purchasing User Guide for an explanation of these screens.

Accounts Receivable

The FAX interface with Accounts Receivable allows you to fax documents through MENU ARREPT. From Demand A/R Statements (MENU ARREPT) and Overdue Notices (MENU ARREPT), you may fax Demand A/R Statements and Overdue Notices, respectively. Refer to the Accounts Receivable User Guide for an explanation of these options.

NOTE: The default for faxing Demand A/R Statements and Overdue Notices is determined on Customer Maintenance Screen 4 in Customer/Ship-to Master Maintenance (MENU ARFILE). Refer to the Accounts Receivable User Guide for an explanation of this screen.

Bid & Quote

The FAX interface with Bid & Quote allows you to fax documents through MENU BQMAIN. From Print Vendor RFQs (MENU BQMAIN) and Print Customer Quotes (MENU BQMAIN), you may fax Vendor RFQs and Customer Quotes, respectively. Additionally, you may fax either of these documents from the End Bid Screen in Enter, Change, Delete Bids (MENU BQMAIN) by using the function keys at the bottom of the screen. Refer to the Bid & Quote User Guide for an explanation of these options.

forms@work

FAX can interface with forms@work to format and fax documents. For more information about faxing via forms@work, refer to the forms@work System Administration Guide.

Distribution iBusiness (A+) Documents That Can Be Faxed

Fax transmissions of selected documents will be initiated through your communications line. Documents that may be faxed from your System i include the following:

* Purchase Orders
* Invoices (including reprints from history)
* Acknowledgments (quotes)
* Demand A/R Statements
* Overdue Notices
* Pick Lists [and Shipping Manifests, if Use Route/Stop is set to Y in Order Entry Options Maintenance (MENU XAFILE)]
* Pack Lists
* Vendor RFQs
* Customer Quotes

The passing of each of these documents is tracked and monitored until completion, ensuring that your document has been sent. History also is maintained for the documents that are faxed.

NOTE: For a list of the documents that can be faxed via forms@work, refer to the forms@work System Administration Guide.

FAX Document Transfer Process

Documents selected for faxing in Distribution iBusiness (A+) will be placed in an output queue to be picked up by the third party facsimile product. To initiate the document transfer process, use the following screens in Distribution iBusiness (A+) to send faxes for the indicated documents:

Purchase Orders

Fax Purchase Orders from any of the following places:

* the End Requisition Screen during purchase order entry through Enter or Change Requisitions (MENU POMAIN)
* the End Purchase Order Changes Screen during purchase order modification through Req/PO Inquiry (MENU POMAIN)
* through Purchase Orders (MENU POMAIN), if the Fax (Y/N) field on the End Order Screen of requisition entry is Y.

Invoices

Fax Invoices from any of the following places:

- the End Order Screen during order entry through Enter, Change & Ship Orders (MENU OEMAIN)
- through Print Invoices (MENU OEMAIN), if the Fax (Y/N) field on the End Order Screen is Y.

> NOTE: A reprint or re-fax of Invoices may be performed with the use of the F5=REPRINT function key (refer to the Reprint Invoice FAX/Print/Email Prompt Screen **(p. A-7)** for details).

Acknowledgements

Fax Acknowledgements from any of the following places:

- the End Order Screen during order entry through Enter, Change & Ship Orders (MENU OEMAIN)
- through Print Acknowledgements (MENU OEMAIN), if the Fax (Y/N) field on the End Order Screen is Y.

Demand A/R Statements

Fax Demand A/R Statements through Demand A/R Statements (MENU ARREPT). You may fax statements through this option if, when setting up the customer, you selected Y in the Fax A/R Statements field on the Customer Maintenance Screen 4 accessed through Customer/ Ship-to Master Maintenance (MENU ARFILE). Refer to the Accounts Receivable User Guide for an explanation of this screen.

Overdue Notices

Fax Overdue Notices through Overdue Notices (MENU ARREPT). You may fax Overdue Notices through this option if, when setting up the customer, you selected Y in the Fax Overdue Notices field on the Customer Maintenance Screen 4 accessed through Customer/ Ship-to Master Maintenance (MENU ARFILE). Refer to the Accounts Receivable User Guide for an explanation of this screen.

Pick Lists (and Shipping Manifests, if applicable)

Fax Pick Lists (and Shipping Manifests, if applicable) from any of the following places:

- the End Order Screen during order entry through Enter, Change & Ship Orders (MENU OEMAIN)
- through Print Pick Lists (MENU OEMAIN), if the indicated warehouse is set up to fax.

> NOTE: The default for faxing Pick Lists is determined on the FAX Warehouse Options Screen **(p. 2-5)**, accessed through Fax System Options Maintenance (MENU AXMAIN).

Pack Lists

Fax Pack Lists from the End Order Screen during shipping confirmation through Enter, Change & Ship Orders (MENU OEMAIN).

NOTE: The default for faxing Pack Lists is determined on the FAX Warehouse Options Screen **(p. 2-5)**, accessed through Fax System Options Maintenance (MENU AXMAIN).

Vendor RFQs

Fax Vendor RFQs from any of the following places:

- the End Bid Screen during bid entry through Enter, Change, Delete Bids (MENU BQMAIN)
- through Print Vendor RFQs (MENU BQMAIN).

Customer Quotes

Fax Customer Quotes from any of the following places:

- the End Bid Screen during bid entry through Enter, Change, Delete Bids (MENU BQMAIN)
- through Print Customer Quotes (MENU BQMAIN)

Faxing/Printing Functions

FAX provides you with both faxing and printing capabilities. Effectively, all documents that you may fax, you may also print, if desired. For details on the existing printing functions, refer to the appropriate Distribution iBusiness (A+) User Guides.

Documents that can be printed using either `Form Type 1` or `Form Type 2` can also be faxed regardless of the form type selected through System Options Maintenance (MENU XAFILE) or the form size selected through Company Name Maintenance (MENU XAFILE).

Distribution iBusiness (A+) Required File Updates

Certain files in Distribution iBusiness (A+) must be updated to ensure that the correct data exists in the appropriate files for fax processing. The files that must be updated include the Customer Master File, Ship-To Address Master File, and the Vendor Master File.

Document Level Overrides

At the vendor and customer level, you can print specific documents in addition to or in place of faxing such documents. The method used for printing/sending documents can be overridden at the document level, so that even if you set the default to always fax Purchase Orders to a specific vendor, you can, while printing a particular Purchase Order, decide that fax transmission will not be used. These document level overrides (if applicable) are identified below.

Purchase Orders

You can override the default faxing option for Purchase Orders on the End Requisition Screen through Enter or Change Requisitions (MENU POMAIN) and on the End Purchase Order Changes Screen through Req/PO Inquiry (MENU POMAIN). When you print Purchase Orders through Purchase Orders (MENU POMAIN), the system uses the value selected in

the `Fax (Y/N)` field on the End Order Screen of requisition entry; information will be stored in the Purchase Order Header File. If a reprint is performed, the selections made when the Purchase Order was originally printed will remain in effect.

Invoices

You can override the default faxing option for Invoices on the End Order Screen through Enter, Change & Ship Orders (MENU OEMAIN). The `Fax (Y/N)` default will be taken from the Customer Master File and you will be allowed to override it on this screen. When Invoices are printed through Print Invoices (MENU OEMAIN), the system uses the value selected in the `Fax (Y/N)` field on the End Order Screen; information will be stored in the Order Header File. If a reprint is performed, the selections made when the Invoice was originally printed will remain in effect.

> NOTE: A reprint or re-fax of invoices may be performed, as well, with the use of the F5=REPRINT function key (refer to the Reprint Invoice FAX/Print/Email Prompt Screen **(p. A-7)** for details).

Acknowledgements

You can override the default faxing option for Acknowledgements on the End Order Screen through Enter, Change & Ship Orders (MENU OEMAIN). The `Fax (Y/N)` default will be taken from the Customer Master File and you will be allowed to override it on this screen. When Acknowledgements are printed through Print Acknowledgements (MENU OEMAIN), the system uses the value selected in the `Fax (Y/N)` field on the End Order Screen; information will be stored in the Order Header File. If a reprint is performed, the selections made when the Acknowledgement was originally printed will remain in effect.

Demand A/R Statements

No overrides exist for the default faxing option for Demand A/R Statements. The value is extracted from Customer Maintenance Screen 4 through Customer/Ship-to Master Maintenance (MENU ARFILE); you will have the ability to fax and/or print the document.

Overdue Notices

No overrides exist for the default faxing option for Overdue Notices. The value is extracted from Customer Maintenance Screen 4 through Customer/Ship-to Master Maintenance (MENU ARFILE); you will have the ability to fax and/or print the document.

Pick Lists

No overrides exist for the default faxing option for Pick Lists. The value is extracted from the FAX Warehouse Options Screen **(p. 2-5)** at the warehouse level through Fax System Options Maintenance (MENU AXMAIN); you will have the ability to fax Pick Lists to this warehouse.

Pack Lists

No overrides exist for the default faxing option for Pack Lists. The value is extracted from the FAX Warehouse Options Screen **(p. 2-5)** at the warehouse level through Fax System Options Maintenance (MENU AXMAIN); you will have the ability to fax Pack Lists to this warehouse.

Vendor RFQs

No overrides exist for the default faxing option for Vendor RFQs. The value is extracted from the Additional Information Maintenance Screen through Vendor Master Maintenance (MENU POFILE); you will have the ability to fax or print the document.

Customer Quotes

No overrides exist for the default faxing option for Customer Quotes. The value is extracted from the Customer Maintenance Screen 4 through Customer/Ship-to Master Maintenance (MENU ARFILE); you will have the ability to fax or print the document.

Distribution iBusiness (A+) Cover Sheet and FastFax Cover Sheet

Cover Sheet

A cover sheet is used in Distribution iBusiness (A+) to provide all pertinent sending information about the document you are faxing. This includes information such as the fax document, company, contact person, fax phone number, hold on fax queue, fax priority, and specific notes, if any.

Cover sheet information will display on-line in Distribution iBusiness (A+) (on the FAX Cover Sheet Information Screen **(p. A-2)**) when faxing a single Customer Quote, Vendor RFQ, Acknowledgement, Invoice, Purchase Order, Pack List, or Pick List (and Shipping Manifests, if applicable). Additionally, cover sheet information also will display when Pick Lists are generated through Print Pick Lists (MENU OEMAIN), if the warehouse is set up to fax. However, this information will display only if the **Fax** field is Y for the selected document in Fax System Options Maintenance (MENU AXMAIN).

Information from the Vendor Master File, Customer Master File, and Ship-to Address Master File will be extracted and displayed on the FAX Cover Sheet Information Screen **(p. A-2)**, as well as any notes that have been keyed for the indicated document through Fax System Options Maintenance (MENU AXMAIN).

The default Fax Priority defined on the FAX System Options Screen for Quadrant's FastFax Software **(p. 2-10)** (MENU AXMAIN) will display on the cover sheet. Fax priorities can range from 1 to 99. A priority of 1 is the highest priority, while a priority of 98 is the lowest priority.