



Infor Distribution A+ Mail Server Overview

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Mail Server Overview

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 Infor Distribution A+ modules are converted into an electronic mail (e-mail) format and sent over the Internet to customers, vendors, warehouses, and Infor 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 Infor Infor 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 POFIL).

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 IAFIL). 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 Infor Distribution A+ modules.

Component Elements

Mail Server	Mail Server adds the capability to store vendor, customer, personal, and internal e-mail addresses to existing Infor 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 Infor Distribution A+ modules and one or more Internet Service Providers (ISPs). Mail Gateway Express monitors the Infor 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 Infor 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).</p> <p>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 POFIL). 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	<p>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, the document will be sent to all the contact addresses assigned to that code.</p>

Internal Email Contacts	<p>Infor 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.</p>
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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 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 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 Infor 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 by 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