Infor Distribution FACTS 7.9.0
FaxLink Users Guide

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About this guide

This guide describes workflow, concepts and procedures for using the Infor Distribution FACTS module, FaxLink.

Intended audience

This guide is for FACTS end users, managers, in-house analysts, and trainers who require an understanding of the product and how to use it.

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in "*For information about other Infor Distribution FACTS modules or basic usage information, see the other users guides in the Infor Distribution FACTS PDF Library. Access these documents from the bookmarks of this document: FACTSDocNavigation.pdf.*

Contacting Infor" on page 5.

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If you have questions about Infor products, go to the Infor Xtreme Support portal at www.inforxtreme.com.

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FaxLink Overview

The FaxLink module provides desktop Faxing capabilities for all Infor Distribution FACTS report and print programs.

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

Fax Directory enables you to create address book entries and print reports of the entries. Programs on the Fax System Administration menu allow administrators to maintain the Fax server and Fax traffic. Text File Prints & Quick Note Entries enable you to fax ASCII text files (20 byte minimum) and access Office Administration Notes for individuals set up in the FaxLink system. Use File Maintenance programs to create and maintain codes, cover pages Fax preparation and transmission options and other FaxLink system parameters.

To enter fax request information, select the Fax modem as you would a printer to display the Fax Information Entry window. You can Fax a document to as many as 9,999 recipients and as few as one. If for any reason the Fax request could not be transmitted successfully (i.e., busy signal, wrong phone number, etc.), trace logs are displayed so the Fax Administrator can troubleshoot the problems. You can fax a document from any FACTS program from which you can print. This includes print screens and Job Stream Entry printouts. When the system prompts for the output device, select F-Fax to access the Fax Information Entry program. The Fax Information Entry Screen consists of three sections: Header: enter Fax sender, cover page, global memo, transmission time, etc. Line-item: enter Fax recipients and Footer: shows recipient destinations; enables you to change header and line-item information and cancel fax requests

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

FaxLink Work Flow and Program Concepts

Fax Directory Work Flow and Program Concepts

Use the programs on the Fax Directory menu to define a Fax phone directory for anyone that you send faxes to on a regular basis and to obtain a listing of those records.

Use Fax Directory F/M (FLF910) to create Fax directory records for existing customers, vendors and any other recipient to whom you frequently send Faxes. Before you can set up a Fax record for a customer or vendor, make sure a customer or vendor record exists in FACTS. For customers, check the AR Customer F/M program.
For Vendors, check the AP Vendor F/M program. The system imports corresponding data from these records, which saves you time. If you are creating a standalone Fax directory entry, the system prompts you for the necessary information. As you add a new customer, customer ship-to, vendor or vendor ship-from record in FACTS,
the system asks if an associated record should be created in the Fax directory.
When deleting a customer, customer ship-to, vendor or vendor ship-from, the associated Fax directory record must be deleted first.

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

FaxLink System Administration Work Flow and Program Concepts

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

Use the System Audit Log (FLI310) program to display a list of the activity on the server since the last time the server was started. Detailed information is displayed for each processed Fax request, including: the time the request was submitted, the Fax request number, User code (Fax sender), the Company the Fax was sent to, Total pages in request, Total pages acknowledged, transmission result, and the phone number. For Unix platforms, FaxLink displays the fax status for a specific user without having to log in as root. Note: This option is not available for Windows/NT platforms due to a VSI-FAX limitation. Windows users are required to use the VSI-FAX client utility to check the status of a fax.

Fax administrators or superusers can use three additional server-related programs:

- the View Active Servers/Router (FLI350) program to view current activity for the server and devices if multiple modems are used. This is a view only screen. Press Enter (CR) to exit from the program.
- the Start a Server (FLU350) program to start a server if it has shut down for some reason.
- the Stop a Server (FLU360) to stop the Fax server.

Text File Prints and Quick Note Entries Work Flow and Program Concepts

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

Use Quick Note Entry to enter notes or messages (quick notes) and send a cover page only transmission. The notes may be sent via the FACTS Office Automation (OA) message system, printed or faxed. Access this program from the SM Message menu or

by typing the access code NOTE anywhere in the menu system. Messages can include up to 999 lines. The message may be printed, faxed or sent as an OA message to as many destinations as needed. The system discards the message once you exit the message screen.

FaxLink Maintenance Work Flow and Program Concepts

The FaxLink File Maintenance menu contains these programs:

Use Fax Class F/M (FLF920) program to categorize Fax records for preparing and sending Fax requests. For example, all customers can be assigned to a specific class by sales region. By using a Fax class, all customers in a class can receive the same Fax without having to enter their recipient information line by line. Sample classes could include: customers by sales region or by sales volume, and vendors by merchandise type or service provided.

The Fax Group F/M (FLF930) program allows the FACTS FaxLink Administrator or superuser to create and maintain Fax groups. Fax groups are used to generate broadcast Faxes. Each group may consist of up to 40 members. The members in the group must all be one of five types: customer Fax records, vendor Fax records, Fax directory records, defined classes or other defined groups. For example, a group type may be customer Fax records or vendor Fax records, but cannot be both. Although a group can only have 40 members, the number of Fax records in the group is unlimited because the group can be a combination of classes or other defined groups. For example, you can define one group of customers Fax records and another group for vendors Fax records. You can then define a third group that includes the customer group and vendor group. When you combine classes and groups, you may find that some records are included in the group more than once. When you prepare a Fax and select multiple classes and groups, FaxLink will send only one Fax to records that are duplicated.

The Fax Cover Page F/M (FLF940) program allows the FACTS FaxLink Administrator or superuser to create and maintain various Fax cover pages. A standard cover page is provided with FaxLink. The standard cover page can be used as is or used as an example to design a custom cover page. When multiple cover pages exist, each user can specify which cover page to use as their default. The default cover page is set SM User Code F/M. Custom cover pages can include text, expanded text, graphics files, text files, and bars. Data elements can be imbedded in the cover page. These imbedded elements will pull the actual data, such as a customer’s name or company name, or a date/time stamp when the actual cover page is generated and faxed.

Use the Fax Options F/M program to define options supported by VSI-FAX, a third-party product. This program is accessible to the FACTS FaxLink Administrator or superuser. For a listing of available tags refer to VSI-FAX documentation.

Administrators can use Static Control F/M (FLF980) to enter and maintain directory locations that FACTS uses to communicate with the VSI-FAX software. Normally, this program is setup during installation and should not require modifications during normal processing.

FaxLink continually references and updates the information contained in this program during normal processing. Normally, the Nonstatic controls are defined during installation and initial setup in Nonstatic Control F/M (FLF990). Once live processing begins, do not change the fields in this program. The changes may compromise your data.

Infor strongly recommends that Systems Administrators password-protect this program (Password & Security Code F/M) Changes should be made only with extreme caution and under the supervision of your Affiliate.

FaxLink Procedures

Starting a server

1. Open this program from the FaxLink>System Administration menu.
2. This program automatically starts the server as it opens. If the server is already running, this program finds a message to this effect.
3. Press F4 to exit. If you run multiple modems, this program starts each of modem as it opens.

Stopping a server

1. Open this program from the FaxLink>System Administration menu.
2. This program automatically stops the server when it opens. If the server is already down, a message appears to that effect.
   If you run multiple modems, this program shuts down each modem.
   If faxes are in process, VSI-FAX performs a soft shut down, which allows the Faxes to transmit before it shuts downs the server.