

## **Description:**

From within the Datatron software, you have the ability to fax or email invoices, statements and purchase orders with additional software (available for a small monthly fee).

## **System requirements:**

- Datatron Software must be at level 2004.12A(100) or higher.
- For faxing:
  - A Class 2 dialup modem. An example: Multitech 2834ZDX
  - An available telephone line.
- For email:
  - A broadband (“always on”) connection to the Internet.
  - Valid e-mail address for use as a “reply-to” address.

## **Configuration of Datatron software:**

After the Faxing/Emailing software has been installed on your system, you will need to configure the Datatron programming to use it.

## **Add entries to the Customer Extra database:**

- Go to Customer Extra Info Description Maintenance (AR-1-1-7-1).
- Hit enter once to get to the second page (100 and greater numbers).
- Locate 3 empty lines so you can add 3 new entries.  
(In this example, we will use lines: 105, 106 and 107.)
- Add the following items. They must be worded exactly like they are listed here:

105) FAX	N
106) FAX OLD INVOICES	N
107) FAX STATEMENTS	N

**Adding fax numbers or email addresses in Customer Maintenance:**

- Go to Customer Master File Maintenance – Change/Inquire (AR-1-1-2).
- Type in customer number, then enter until you see the lines you entered above.
- Modify each line with the customer's fax number or email address.
  - The fax number must be exactly as it needs to be dialed (include a “1” and an area code if necessary) or emailed (entire email address).
  - Notice: The email address is currently limited to 24 characters.
  - Some examples:

105) FAX	15159875055
106) FAX OLD INVOICES	15159875055
107) FAX STATEMENTS	support@datatronltd.com

**Add vendor fax numbers or email address in Vendor Maintenance:**

- Go to Vendor Master File Maintenance – Change/Inquire (AP-1-2).
- Enter vendor number and enter once more to get to the second page.
- Enter vendor's fax number or email address into Item 37 “Purchase Order Fax Info”
  - The memo field may be left empty. You may use it to label each number or email address if there are multiple ones for a particular vendor.
- The "FAX LPT#" field must be filled out and it MUST say "LPTF1".
  - Use “LPTF1” for both fax numbers and email addresses.
- An example showing a fax and email entry:

		MEMO	NUMBER	FAX LPT#
		-----	-----	-----
37.	FAX 1	EMAIL	scott@autologue.com	LPTF1
	FAX 2	FAX	15159875055	LPTF1
	FAX 3			LPT
	FAX 4			

**Fax or email an invoice:**

- Go to Print Chg/Cash Invc's / Interface To Statement Discount File (OE-8-21).
- Choose “(F) FAX INVOICES” for #1 Sort By.
- If the Customer Extra record is set up correctly (see above), the customer’s fax number or email address will be displayed after the customer’s number has been entered for Line 6.
  - Line “(20) PRINTER” will also change to "LPTF1"

## **Fax or email statements:**

- Run statements as usual via Accts Receivable Statement Printing (AR-8-5).
- Customers with something entered in their “FAX STATEMENTS” Customer Extra record will automatically have their statement sent to the number or email address recorded in that field.
- A “STATEMENT FAXED” message will appear on the printed copy of the customer’s statement.

**Important note:** DO NOT change the printer number for Question #15 if Option “A” (Print, Auto Faxes, Updating) is chosen. If you need to send your printed statements to a different printer, make that change in A/R Define System Parameters (AR-16-2-5A) first and then re-enter the statement program.

## **Fax or email purchase orders:**

- The Outstanding Order Items Report (OE-9-13) is the program that is used to fax/email purchase orders.
  - When “ALSO FAX ?” is answered “Y” for #32 on the 2nd screen of Automatic Ordering (OE-9-4), the program chains to the Outstanding Order Items Report for faxing/email.
- Select “D. FAX ORDER” for Item 1.
- After the PO has been selected, the fax or email address will be displayed and you will be asked if it is “OK?”.
  - If you have multiple addresses and/or numbers set up, answer “N” until you see the one you want to use and then enter “Y” to continue.

## **Fax or email a “standard” ASCII text file:**

- Back out to the "DOT" and "LOG" to the directory where the file is located that you want to fax.
- Type a single command (at the dot) to send the desired file:
- To fax:
  - On LINUX, type: `host faxspool -q <phonenumber> <filename>`
  - On IBM/AIX, type: `host sendfax -nd <phonenumber> <filename>`
- To email:
  - Type: `host emaildt <email@address> <filename>`

## Faxing Maintenance:

- To see the status of the fax queue
  - Back out to the "DOT" and type: faxlog
  - The system will show the last few faxes/emails, their status and job id numbers, as well as the current status of the program.
- To remove a queued fax type: host faxrm <jobid>

## Email client:

You may need to make the following Font style changes in your email client to view the incoming emails appropriately.

### Outlook Express:

```
INBOX
  TOOLS
    OPTIONS
      >READ (Tab at top)
      ** "READ ALL MESSAGES IN PLAIN TEXT"
        FONTS
          Proportional Font:  COURIER NEW
          Fixed Width Font:   COURIER NEW
          Font Size:          SMALLER
```

### Outlook:

```
INBOX
  TOOLS
    OPTIONS
      >MAIL FORMAT (Tab at top)
        FONTS
          When Composing and Reading Plain Text:  10 PT. COURIER NEW
```

## For technical support:

- Contact Jason at the Datatron main office: 800-747-9611