



" Message Manager "

An Electronic Document Delivery
System for ProfitTool

White Paper on the Key Operational Functions



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System Overview

The following narrative outlines the operational aspects of a new series of software utilities to automate the functions of E-mailing and Faxing all ProfitTool Business Documents, e.g. Sales Order Acknowledgements, Confirming Purchase Orders, Customer Invoices and Customer Statements.

Global System Settings

Server Settings:

All of the necessary software components for the full implementation of these utilities are included with the base ProfitTool message Manager System. These utilities require both a server and a client workstation set up.

- Server Set Up – Fax Operation: This set up is required of the PC that is acting as the Message Manager Server, and contains the modem access to your fax line. There is a Message Manager Server set up utility available for this purpose. This set up function will install a separate Message Manager Executable on the server PC, which must be activated each day.
- ProfitTool Message Manager Set Up – Fax Operation: This set up is part of the Message Manager System Options and denoted the following settings:
 - Cover Sheet Y/N.
 - Show Banner Y/N. If yes, there are options to set up the banner format.
 - Default Time to Send Y/N. This allows for a system default time to send faxes. If yes, there is a field to set the hour, minute and AM/PM.
 - Path to Fax Data Server. This will point the ProfitTool business documents to the central fax point.
 - Connection Fails retries. User definable number of retries to send faxes.
- Server Set Up – E-mail: The Message Manager utilizes SMTP (Simple Mail Transfer Protocol) the de facto standard for email transmission across the Internet. If your mail server requires authentication, please contact the GDS Systems Services group for assistance.
- ProfitTool Message Manager Set Up – E-Mail Operation: This set up is part of the System Manager System Set Up and Preferences. This sections allows for the following setting settings:
 - Default SMTP Mail Server.
 - E-mail attachment format, PDF file or HTML.



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[Client Workstation Settings:](#)

- Client Set Up – Fax Operation: There are no specific client workstation setting required to for the faxing operation.
- Client Set Up – E-Mail Operation: This set up is part of the System Manager User Maintenance section. Within this section, there is a user preference, which will allow for the entry of the user e-mail server name, their e-mail address and their default e-mail attachment preference, PDF or HTML. Note: If PDF is the e-mail attachment, the user must install the PDF writer into their printer folder.

[System Operation](#)

Listed below are the operating characteristics of how the ProfitTool fax and e-mail system process transactions.

[ProfitTool Customer Master File Enhancements:](#)

Contact	Area Code	Phone	Ext.	Fax Area Cd.	Fax Phone	email Address
Mike Orso	314	427-1661		314	427-6088	morso@gen-data.cc
Dave Whiting	314	427-1661	121	314	427-6088	dwhiting@gen-data
Karen Fogerty	314	427-1661		314	427-6088	kfogerty@gen-data.

The Customer File will provide the ability to identify a specific individual, method of delivery and the corresponding delivery number (fax or e-mail) for all three customer related business documents.



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Sales Order Acknowledgements:

- When a sales order is entered, it will be triggered for fax or e-mail by the settings contained within the flags the Customer Master File. These default settings can be over-ridden at time of entry by selecting either another customer contact or un-checking the appropriate box on the sales order/invoice entry screen.
- All fax numbers and/or the e-mail addresses are pulled from the contact record(s) associated with the customer record.
- Each document (quotation – sales order acknowledgement - invoice) has a separate print flag, which control printing.
- When a batch of sales orders are printed for pick tickets, the “printer” radial button will produce printed pick tickets for all sales orders regardless of whether they were marked to print, fax or e-mail.
- When a batch of sales orders are entered for sales order acknowledgements and there are sales orders that need to be faxed and/or e-mailed, the following procedure is recommended:
 - First select “fax” – This will send to the fax engine all the sales orders acknowledgements flagged to be faxed out of that batch.
 - Next select “e-mail” – This will render the sales order acknowledgements into a .PDF and attach it to an e-mail message.
 - Next select “print” – This will print sales order acknowledgements for all those orders left in the batch to be printed on paper, if required.
 - To reproduce any sales order acknowledgements out of the batch would require knowing which order or range of orders would be affected and then operate the print, fax, or e-mail functions with the reprint flag operative.

Invoices:

- When a sales order is called up for invoicing, it will be triggered for fax or e-mail by the settings contained within the flags the Customer Master File. These default settings can be over-ridden at time of entry by selecting either another customer contact or un-checking the appropriate box on the sales order/invoice entry screen.
- When a batch of invoices are entered and there are invoices that need to be faxed and/or e-mailed, the following procedure is recommended:
 - First select “fax” – This will send to the fax engine all the invoices flagged to be faxed out of that batch.
 - Next select “e-mail” – This will render the invoice into a .PDF and attach it to an e-mail message.
 - Next select “print” – This will print invoices for all those orders left in the batch to be printed on paper.
 - To reproduce another set of invoices out of that batch, which would be an internal copy of all the paper, fax and e-mailed invoices, you would need to perform a reprint option on just that batch of invoices. This requires knowing the beginning and ending invoice number from that batch.



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Customer Statement

- The customer record has a Statement Contact, which accesses the customer contacts for selection. As well, there are flag setting for fax and e-mail statements.
- The statement print routine will render the statements as they are marked. That is, the print option will print only those statements that do not have the flag set to fax or e-mail. Likewise the fax option will render only the statements marked for fax and the e-mail option will render only those statement marked for e-mail.

ProfitTool Vendor Master File Enhancements:

Contact	Area Code	Phone	Ext.	Fax Area Cd.	Fax Phone	email Address
Dave Whiting	314	427-1661	121	314	427-6088	dwhiting@gen-data.com

The Vendor File will provide the ability to set up multiple contacts and the corresponding delivery number (fax or e-mail) for all Purchase Orders sent to that Vendor.

Purchase Order Entry:

- When a purchase order is entered, it will be triggered for fax or e-mail by the settings selected on the PO entry screen and Vendor Contact records are available for selection during the PO entry process. All fax numbers and/or the e-mail addresses are pulled from the contact record(s) associated with the customer record.
- The PO fax and e-mail rendering options follow the same process as outlined for both Sates Order Acknowledgements and Invoices.