

How to use PROMPT automatic fax and email

The benefits of this PROMPT feature are automatic generation of an invoice, quote (any document generated by Sales Order Processing, OP option 1), purchase order (IC options 2, 3), accounts receivable statement (AR options 2, 4) and customer price report (IC options 1, 6, 9).

The feature is implemented by using the salutation field in the Accounts Receivable Customer Master File (AR 1,1) that has been enlarged and renamed Doc: for Document routing address. Either a fax telephone number or an email address can be entered for electronic document routing and there is a way to use this for printing in your office too. The same capability to enter an electronic routing address is provided in the Accounts Payable Vendor Master File (AP, 1) for purchase orders. Please note that the purchase order doc routing address is on the right side of the vendor maintenance screen whereas the doc on the left is for the check address of the vendor.

Once this document routing address is entered all that is required to automatically send the document via fax or email is to print it to a special printer name created in PROMPT of ELECTPRT.

Details about entering the doc routing address in customer or vendor file

If the document routing address is a fax phone number enter it like this:

fax.1-502-695-8129 (example of long distance, you must enter the 1), or
fax.695-8129 (example of a local call)

The word fax followed by a phone number tells the software to send a fax to the number that follows, BUT only if the document is printed to ELECTPRT.

If the document routing address is an email address enter it like this:

www.garvin@prompt-usa.com

The three letters www followed by a period tells the software to send an email to the address that follows, BUT only if the document is printed to ELECTPRT.

Details about printing to ELECTPRT.

Invoices, quotes and purchase orders

In Sales order processing we have set up new session controls of **ei** for electronic invoice. If you print quotes we have setup **eq** for quotes.

To send an invoice to a customer's doc address simply change the session control to **ei** and print. Purchase orders work the same way in IC 2,3.

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Accounts receivable statements

The printer that prints Accounts Receivable Statements is determined in **PD** option **PC** Access key **#BARSTM0**. Change the printer name to **ELECTPRT** and statements will be sent electronically based on the customer's doc address.

Customer price report

The printer that prints a Customer Price Report is also determined in **PD** option **PC** but the Access key is **#BINCPR0**. Change the printer name to **ELECTPRT** and the price report will be sent electronically based on the doc address.

A doc routing address for US mail! (prt.)

If you print a statement for a customer with the printer set to **ELECTPRT** and the doc routing entry for this customer is **prt.** the statement will print on the system printer in your office. This means you can chose to always print statements to **ELECTPRT** and only mail the ones that print in your office.

All electronic document printing works this way!