



AutoPoint[®]
Evolution

Electronic Post Office (*Without DOCFOCUS*)

Updated November 23, 2009

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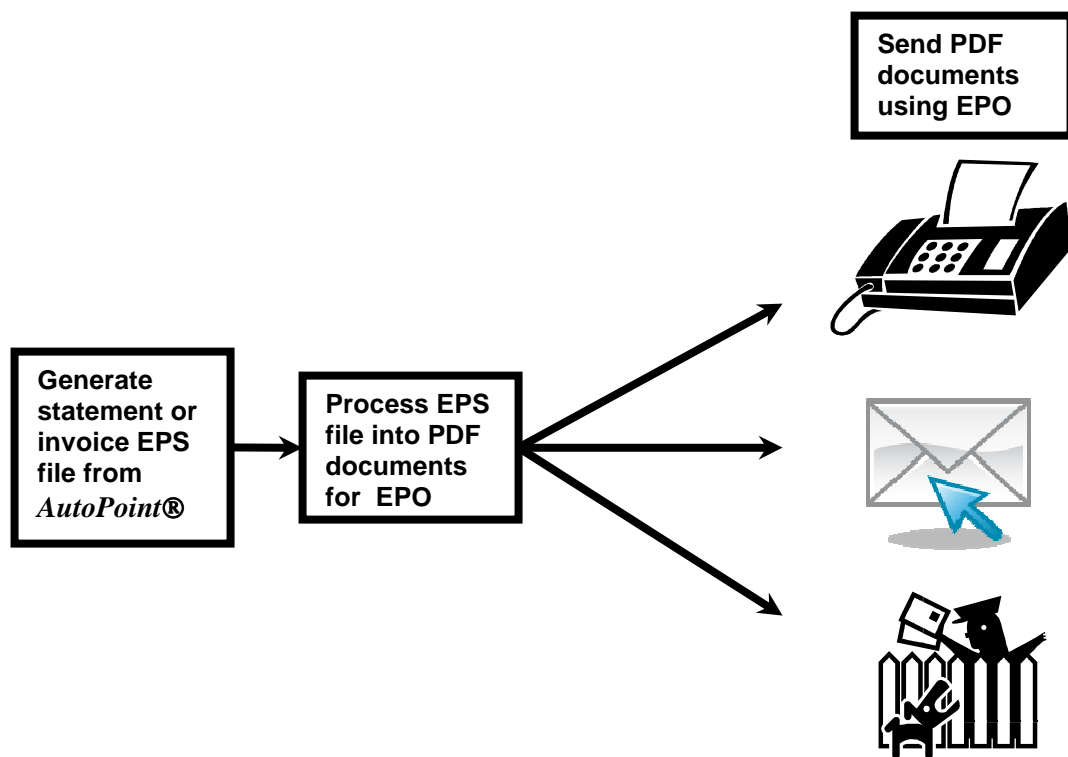
1.0.0 Chapter 1 – Introduction

1.1.0 Overview of EPO

AutoPoint®'s Electronic Post Office system (a.k.a. EPO) allows you to fax or e-mail statements and invoices to your customers. Paper statements and invoices can be printed for those customers who still prefer to receive them by ground mail, as a part of the same process. Flyers or other documents can be included as attachments when sending statements.

This document explains the following:

- Setting up customers to receive their statements or invoices by fax and/or e-mail, or by ground mail.
- Doing a statement run from **AutoPoint®**, and transmitting them from EPO.
- Exporting invoices after your End-of-Day, and transmitting them from EPO.
- Including flyers or other documents with statements.
- Checking the transmission logs after doing an EPO run to confirm that the documents were transmitted successfully.



1.2.0 Conventions Used in this Manual

The following are explanations of the notations used in this manual to describe an action:

- A keystroke on the keyboard is described using the “<” and “>” characters. For example, the TAB key is displayed as “<TAB>”. The function keys along the top of the keyboard are described as “<F5>” for FUNCTION key 5. Combinations of keys using the CTRL, SHIFT or ALT keys are described using prefixes to the key that must be pressed at the same time. For example, pressing the SHIFT and FUNCTION 5 keys is displayed as “SHIFT-<F5>”.
- For instructions that describe following a menu structure, the “→” character separates the menu selections. For example, to get to the Stock Status Inquiry screen from the top “AM” menu, go to “6. Inquiries” → “1. Stock Status Inquiry”. You can also jump to a particular program or menu from the “SELECT:” prompt by entering the menu entry numbers. In the Stock Status Inquiry screen example, you can enter “AM0601”.
- Program names are described in all upper case. For example, the Stock Status Inquiry Screen is displayed as “AMSTOCKINQ”. To bypass the menus and go into this program directly, enter the program name in upper-case at the “SELECT:” prompt in any menu, and press the <ENTER> key.
- Instructions that must be followed in a particular sequence have steps that are numbered, and all steps must be followed to complete the action described. Some steps may have a condition that will require you to skip steps, and in these cases, the instruction “**go to page xx**” will be in bold characters.
- Extra information that further explains a step or procedure is in italic characters, preceded by a “*NOTE:*”.
- Screen prints are included with the instructions to demonstrate what you can expect to see on the screen at a particular step in a procedure. Please note that your screen will not be exactly the same, and will be slightly different.

1.3.0 Legal Notice

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2.0.0 Chapter 2 – Set-up and Configuration for EPO

2.1.0 Surveying customers for delivery method preference

About a month before transmitting documents via EPO for the first time, it is a good idea to send out a survey form to all your customers asking for their delivery method preference. The survey should inform customers when you intend to start sending statements/invoices electronically and provide space for them to send back their fax number and/or e-mail address. As the surveys come back, you will need to update their customer records as per the instructions below.

NOTE: It is only necessary to change those customer records that will not use ground mail delivery. Please contact Amador Support to run a utility that will automatically change all records that are not marked for e-mail and/or faxing to “ground” for regular mail delivery.

2.1.1 Sample letter to survey customers for delivery method preference

Dear Valued Customer,

In our ongoing efforts to increase efficiencies and ensure that we are doing our part to be environmentally friendly, Amador will be sending out our invoices and statements electronically as of October 1st, 2007.

Please provide an email address or fax number where you would prefer to have these documents sent. Your response can be emailed to ar@amador.ca or faxed to 780-489-2601. Please reply back with your preference by September 17th, 2007.

Select ONE of the following options and provide a corresponding e-mail and/or fax:

Email address _____

Fax number _____

Both _____

Please do not hesitate to contact us with any questions or concerns.

Regards,

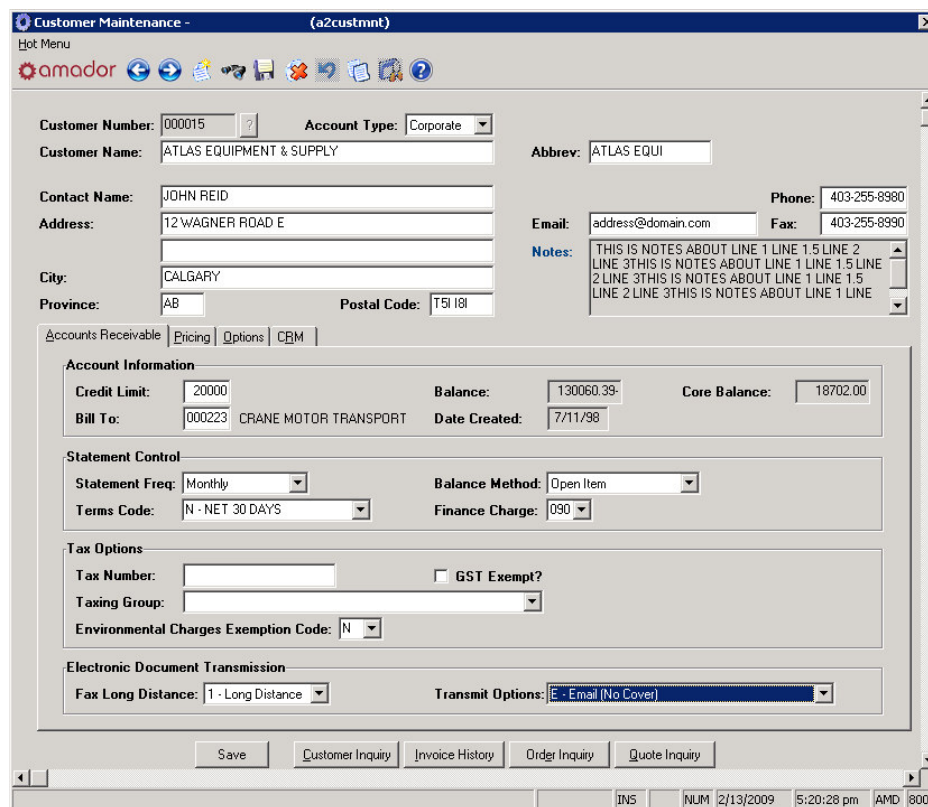
Amador Accounts Receivable

2.2.0 Specifying preferred delivery method by customer

2.2.1 Assigning the send option in Customer Maintenance

Before being able to send statements or invoices electronically to your customers via EPO, you must first specify which customers will receive their statements/invoices via fax, e-mail, both fax & e-mail, or regular mail (ground.) This preference is set up in Customer Maintenance, under the Accounts Receivable tab.

To get to the Customer Maintenance screen, enter “CM” at the **AutoPoint®** “SELECT:” prompt, or follow the menus “5. File Maintenance” → “3. Customer Maintenance”. Enter the customer number and on the Accounts Receivable tab, look at the Electronic Document Transmission section for the Transmit Options:



The screenshot shows the 'Customer Maintenance' window for customer 'ATLAS EQUIPMENT & SUPPLY'. The 'Accounts Receivable' tab is active, and the 'Electronic Document Transmission' section is expanded. The 'Transmit Options' dropdown is set to 'E - Email (No Cover)'. Other visible fields include Customer Number (000015), Contact Name (JOHN REID), Address (12 WAGNER ROAD E, CALGARY, AB), and various account balances and terms.

Enter the fax number for this customer or (555) 555-5555 if they have none, and press <ENTER>. If you must dial long distance, select “1” in the square brackets, otherwise select “0” if it is a local call. Remember to always enter the area code, even for local fax numbers, as 10-digit dialing for local calls is now required.

*NOTE: whether the number is local or long distance depends on where the fax modem connected to the **AutoPoint®** server is located.*

For the Transmit Options, specify the method of sending invoices and statements for this customer, as follows:

- E – e-mail only.
- Y – Fax only, with a cover page.
- C – Fax only, without a cover page.
- G – Ground only.
- B – e-mail and fax, with a cover page.
- D – e-mail and fax, without a cover page.

NOTE: If the customer has a bill-to record, be sure to enter the delivery method in the bill-to customer record only, otherwise the delivery methods set up in the ship-to customer records will override what is set up in the bill-to record. That is, the ship-to's must have an "N" in field 12 to ensure that what is set up in the bill-to is the actual delivery method.

If you select "E", "B" or "D", a pop-up will appear, asking for the e-mail address to be filled in. Enter the e-mail address using the recipient@domain.com format, with no leading spaces or other special characters:

Press <ENTER> to save the e-mail address, and press <F12> to save the changes to the customer record.

2.2.2 Listing customer send options

You can run a report to list what send options were assigned in Customer Maintenance. To get to this report, go to the IMG menu and select "2. File Maintenance":

Select "2. Document Imaging Customer List" to bring up the report ranges:

Select the output option for Fax, E-mail, Both fax & e-mail, Ground, None or All, and the report should appear as follows:

```
File: 04332 Page 1 of 14
```

```
"Your Company Name"          DOCUMENT IMAGING CUSTOMER REPORT          DATE- 1/03/08 17:55:33 TSND PAGE 0001
```

```
BRANCH ID: CGY AMADOR, CALGARY      REGION:      DISTRICT:      CUSTOMERS: ALL
```

```
Invoice: Y(fax), E(email), B(email & fax), G(ground), N(none). No Coverpage Options: C(fax), D(email & fax) EXCLUDE CASH TERMS
```

CUSTOMER	CUSTOMER NAME	OPTION	EMAIL ADDRESS		STATEMENT FREQ	TERMS	BILL-TO	CUST-TYPE
			FAX NUMBER					
000015	ATLAS EQUIPMENT & SUPPLY	E	1234567890@jazzznanzzzzzzzzzzzzzzzzzzzzz.ca					
999020	"Your Company Name"	G	1(403)255-8990	Semi-monthly	N		EMP	
999031	Amador Business Computers Inc.	G	(555)555-5555	None		T	XFER	
		G	(555)555-5555	None		T	CASH	

2.2.3 Exporting the customer list to a mail-merge or contacts program

It is possible to export the customer contact information set up in Customer Maintenance into a “.tsv” (or “tab separated values”) file, and then import this file into mail-merge or contacts software. For example, you could import the “.tsv” file into a word processing program to create mailing labels or import the file into your e-mail program’s contacts folder. Please see your software’s documentation for instructions on importing “.tsv” files.

To generate the “.tsv” file from **AutoPoint®**, enter “IMG” at the “SELECT:” prompt and then select “2. File Maintenance”. From the File Maintenance menu, select “3. Export Customer Imaging Setups”. Enter the ranges as follows to generate a complete listing of all customers:

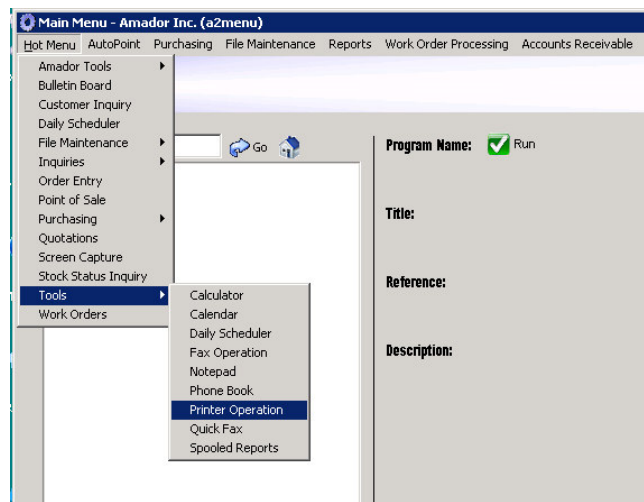
This program will generate the file “customersync.tsv” in the /usr1/imgproc folder on the **AutoPoint®** server, which can be transferred to your PC using SmarTerm’s FTP Drag ‘n Drop. It will also generate the following report, displaying the same information:

File: 04389		Page 7 of 14			
"Your Company Name"		CUSTOMER LISTING		DATE- 1/16/98 11:27:06 TSNED PAGE 0007	
BRANCH ID: ALL		CUSTOMERS: ALL			
CUSTOMER	CUSTOMER NAME ADDRESS 1 ADDRESS 2 CITY / PROV / POSTAL	CONTRACT PHONE NUMBER FAX NUMBER EMAIL ADDRESS	STATEMENT FREQ	DATE CREATED	
221850	DAVE ROSS TRUCKING PO BOX 39 SHERWOOD PARK, AB T0H 1G0	DAVE ROSS (797)792-9760 (780)489-2601 Y	Monthly	7/26/96	
255750	NORTHWESTERN CONTRACTING LTD. BOX 1400 STRATHCONA, AB T1Y 7N3	(797)792-9760 (555)555-5555 G	Monthly	7/26/96	

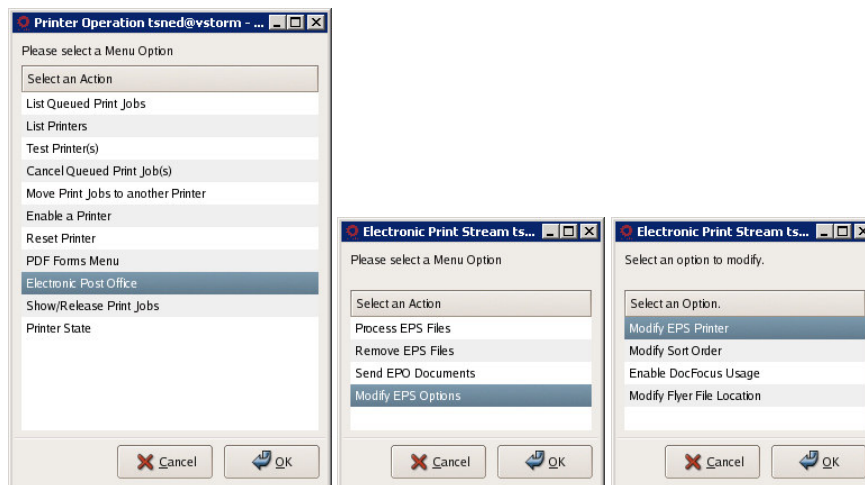
2.3.0 Setting EPO options

2.3.1 Specifying a default printer for printing documents for ground mail

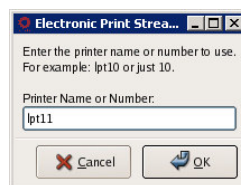
To print documents for those customers set up for ground mail delivery through the EPO process, you will need to specify a printer to print the statements and invoices. Please contact Amador Support to confirm whether the physical printer you wish to use will be able to handle this. To specify the EPO printer, go to the Hot Menu from the menu bar in the main menu. Select Tools → Printer Operation.



Select the option “Electronic Post Office” from the Printer Menu, and then select “Modify EPS Options” from the EPS Menu.



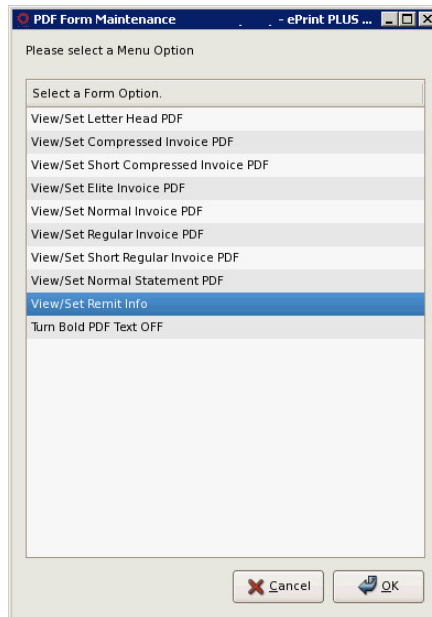
From the EPS Options Menu, select “Modify EPS Printer”:



Enter the printer number set up in *AutoPoint*® and press click on the “OK” button.

2.3.2 Creating “REMIT TO:” information on statements

If you wish, it is possible to create a line at the bottom of statements that shows “remit to” information. To do this, go to the Hot Menu from the Main Menu. Select Tools → Printer Operation. Select the option “PDF Forms Menu” from the Printer Menu, and then select “View/Set Remit Info” from the PDF Forms Menu:



Enter the remittance information, preceded with “REMIT TO:”, and click on the “OK” button. The maximum number of characters is 90.

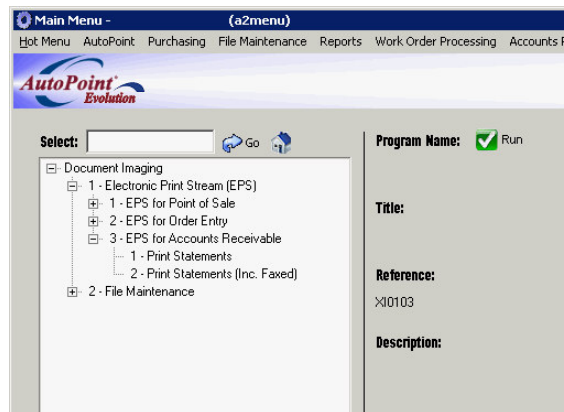
NOTE: If the Ampersand character (“&”) appears anywhere in the “REMIT TO:” information, please call Amador Support to make edits to your “REMIT TO:”. Otherwise, this information will not appear correctly on statements.

3.0.0 Chapter 3 – Transmitting Documents via EPO

3.1.0 Transmitting Statements via EPO

3.1.1 Creating the Monthly Statement EPS file from AutoPoint®

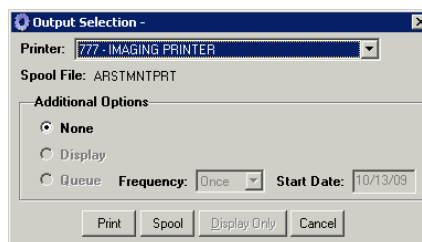
1. When you are ready to send out your statements, go to the Imaging menu to generate the statement EPS file. At the “SELECT:” prompt, enter “IMG” to bring up the Document Imaging menu. Expand “1” to select the EPS menu:



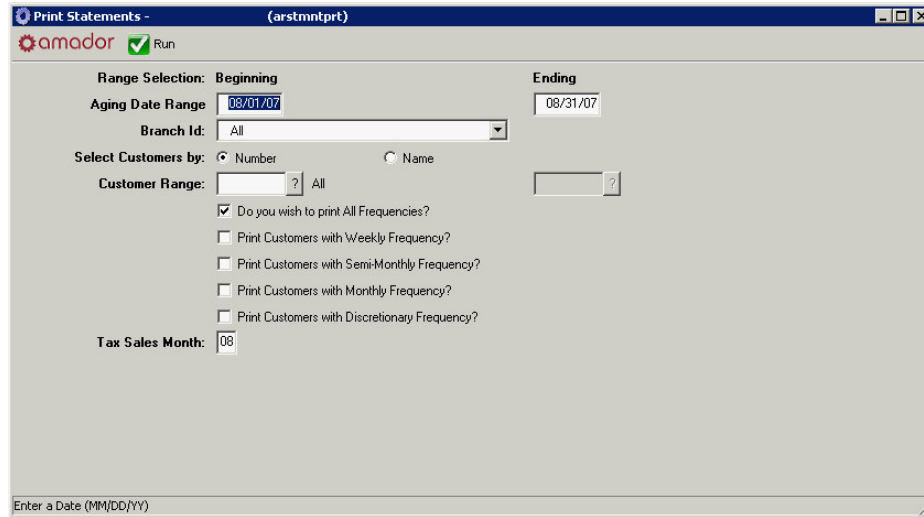
2. On the EPS menu, expand “3” to process statements:

3. Expand “1” to select the “Print Statements” program:

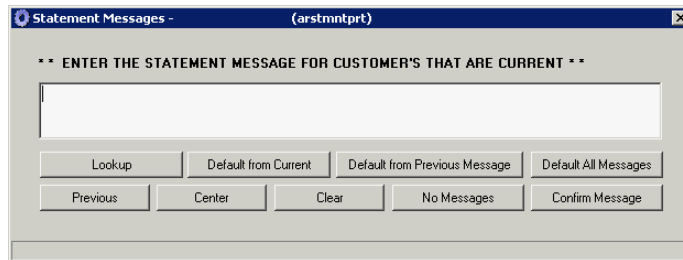
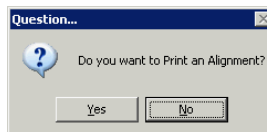
4. At the Output Selection screen, select the Imaging Printer, “777” from the drop-down menu and click on the “Print” button:



5. On the Print Statements screen, enter the ranges for the statements, paying special attention to Date, Branch and Customer:

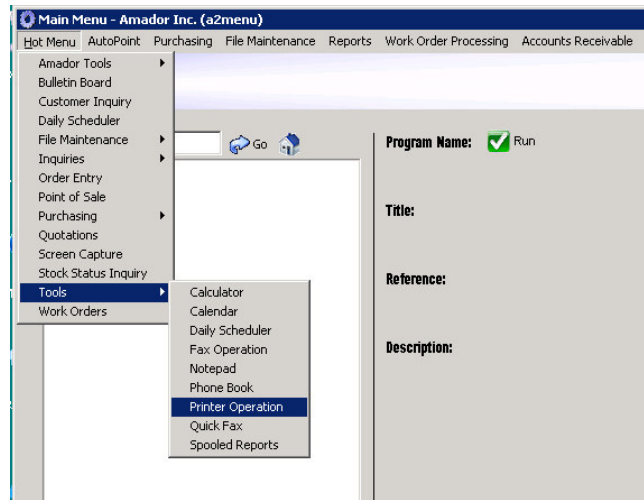


6. After entering the Print Statement ranges and clicking on “Run”, enter a comment (optional) to appear at the end of the statements. Answer “N” to “Do you want to Print an Alignment?”:

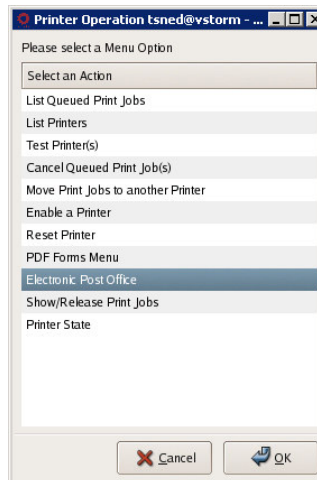



3.1.2 Processing the statement EPS file generated from *AutoPoint*®

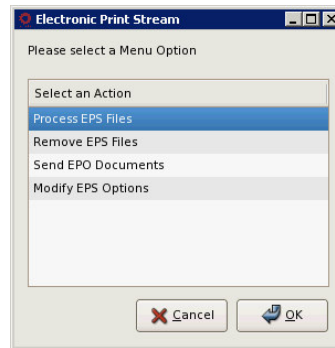
7. After sending the statements to the Imaging Printer, bring up the Hot Menu clicking on it from the Main Menu. Select “Tools”, and from the sub-menu, select “Printer Operation”:



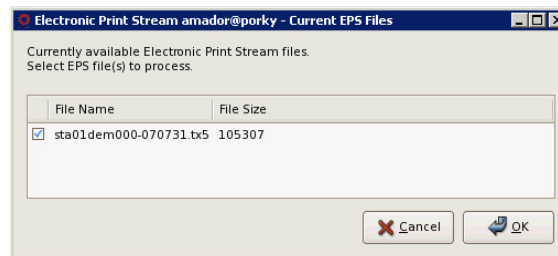
8. From the Printer Menu, use the arrow keys or enter the 9 for “Electronic Post Office”. Click on the “OK” button:



9. On the “EPS Processing” menu, select “Process EPS Files” to prepare statements for sending via EPO. Click on the “OK” button to continue:



10. Find your statement run(s) (created in steps 4 to 6.) The file name is made up with the following parts, “sta01CCCnnn-YYMMDD.tx5”, where “CCC” is the company code, “nnn” is the branch invoice prefix (“000” is used when all branches were selected during Print Statements) and “YYMMDD” is the last date in the date range entered during Print Statements. Check the box next to the file you wish to process. You can select more than one statement EPS file if you wish. Click on the “OK” button to continue:

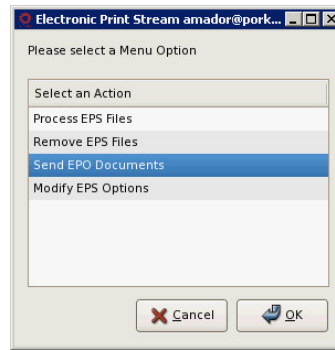


NOTE: If you do more than one statement run for the same company, branch(es) and ending date range, an “-02” will appear at the end of the file name. The newest statement run is always the file name without anything after “.tx5”.

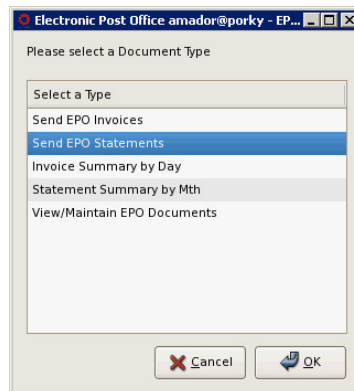
11. The “EPS File Processing Summary” screen will appear once the EPS file is processed. Click on the “OK” button to continue.

3.1.3 Sending EPO statement files

12. After processing the EPS file, the “EPS Processing” menu will re-appear. Click on the item, “Send EPO Documents” to select it and then click on “OK”:



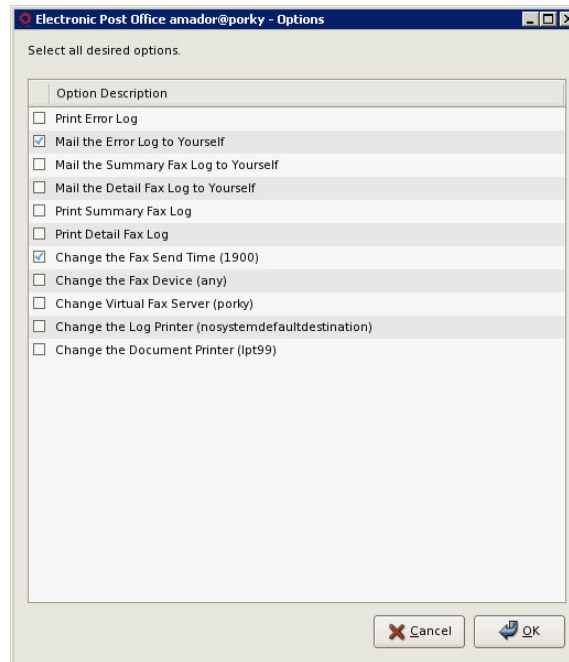
13. Click to select “Send EPO Statements”. Click the “OK” button to continue:



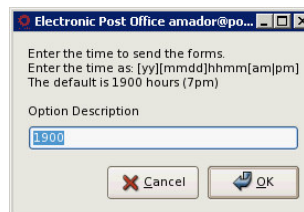
14. In the EPO Processing screen, a list of EPO Documents will appear, by branch. Select the EPO documents to transmit by checking the box next to it. You can select more than one statement file if you wish. Click on the “OK” button to continue:

If you get any EPO Processing errors, please contact Amador support for help with troubleshooting and resolving the error(s):

15. The next step is selecting the EPO Transmit Options. Click to check the box next to select the desired options. Usually only options 2, 4 and 7 are needed. This screen will only appear once in the sending process, so be sure to select all the options you wish to change. Click on the “OK” button to continue:



- Print Error Log – Select this option to send the error log to the log printer.
- Mail the Error Log to Yourself – Select this option to send the error log to your **AutoPoint®** mailbox.
- Mail the Summary Fax Log to Yourself – Select this option to send the summary fax log to your **AutoPoint®** mailbox.
- Mail the Detail Fax Log to Yourself – Select this option to send the detailed fax log to your **AutoPoint®** mailbox.
- Print Summary Fax Log – Select this option to send the summary fax log to the log printer.
- Print Detail Fax Log – Select this option to send the detailed fax log to the log printer.
- Change the Fax Send Time – The time in parenthesis is the default send time. Select this option to change the send time (24 hour format.)



- Change the Fax Device – Do not change this option.
- Change Virtual Fax Server – Do not change this option.
- Change the Log Printer – Do not change this option.
- Change the Document Printer – Do not change this option.

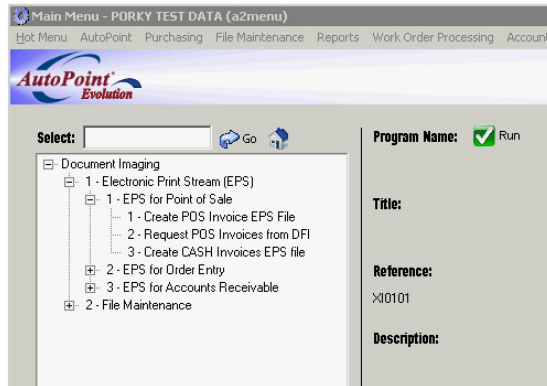
16. Once the options have been set, a results screen will appear showing which customers have been sent which documents and by which methods (e-mail, fax, print):

Be careful to not click the “OK” button before the transactions are all sent and deleted, and the window closes, otherwise the sending of the EPO Documents will be interrupted, and you will have to re-send the remaining ones.

3.2.0 Transmitting Invoices via EPO

3.2.1 Creating invoices EPS file from AutoPoint®

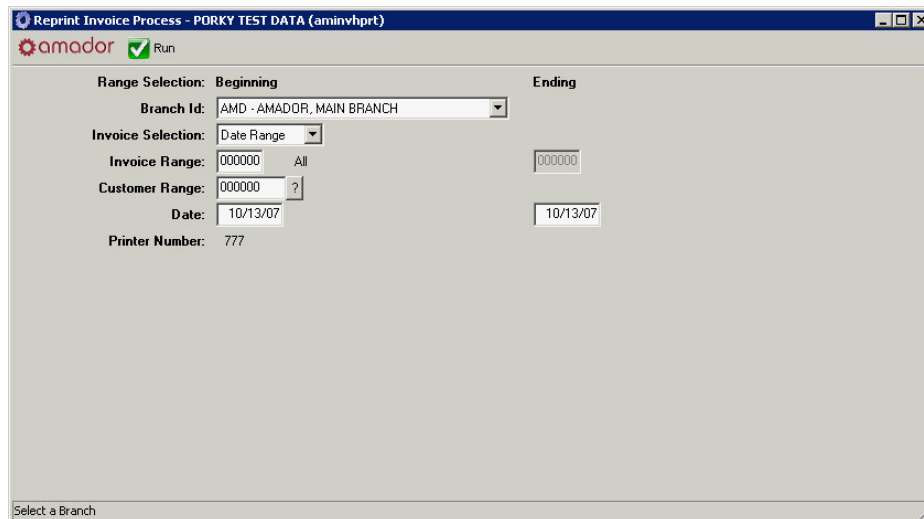
1. When you are ready to send out invoices, go to the Imaging menu to generate the invoice EPS file. At the “SELECT:” prompt, enter “IMG” to bring up the Document Imaging menu. Expand “1” to select the EPS menu:

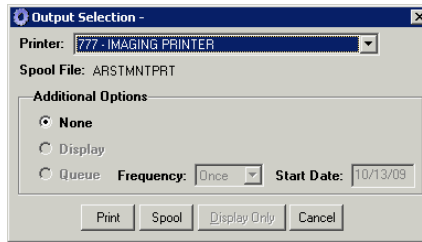


2. On the EPS menu, expand “1” to process POS invoices (**go to step 3**), or expand “2” to process OE invoices (**go to step 5**):

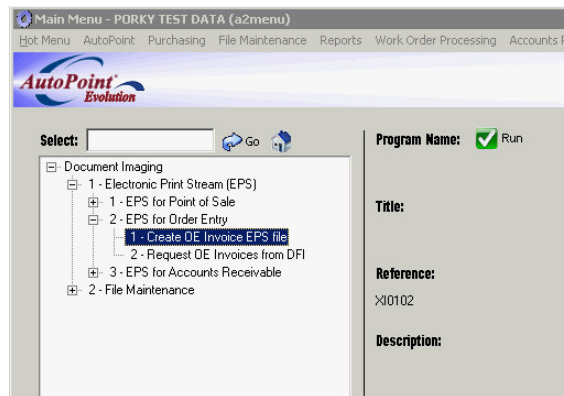
3. Expand “1” to select “Create POS Invoice EPS file”:

4. On the “Reprint Invoice Process” screen, enter the branch and date(s) (you can include any range of business days on which end-of-day has been completed – try to run this process frequently enough not to include enough days to cause an overly lengthy process), specify the printer number 777, and then **go to step 7**:

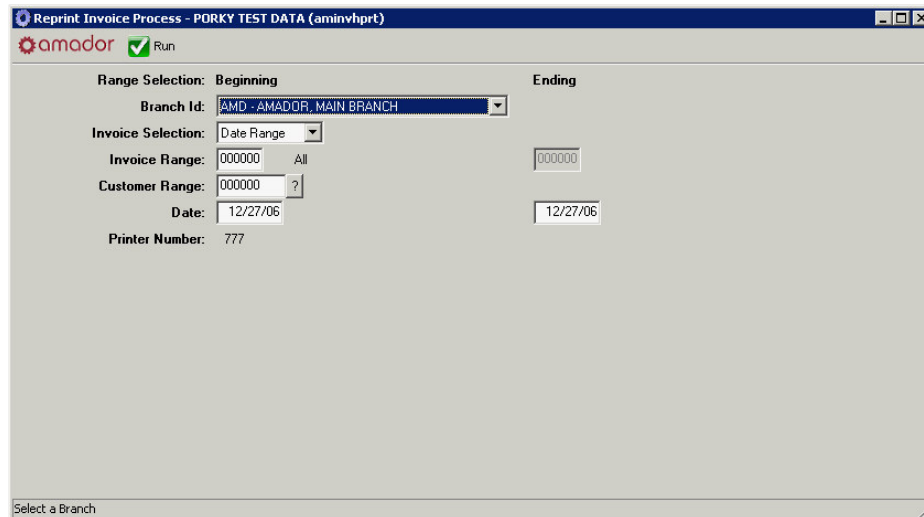




5. Expand “1” to select the “Create OE Invoice EPS file”:

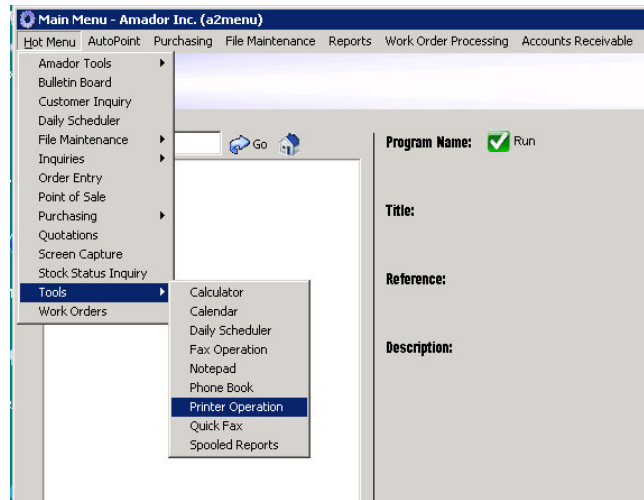


6. On the “Reprint Invoice Process” screen, enter the Order Entry branch and date(s) (you can include any range of business days on which end-of-day has been completed – try to run this process frequently enough not to include enough days to cause an overly lengthy process), specify printer number 777, and then **go to step 7**:

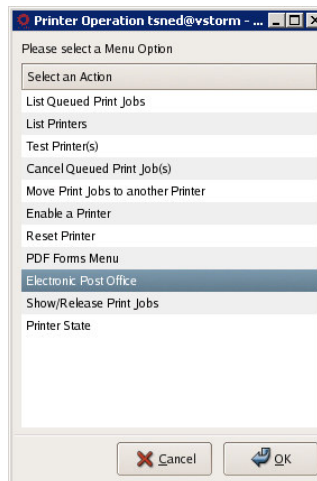


3.2.2 Processing the invoice EPS file generated from AutoPoint®

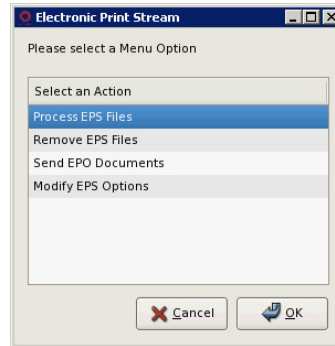
7. After sending the invoices to the Imaging Printer, bring up the Hot Menu by clicking on it from the Main Menu menu bar. Select “Tools”, and from the sub-menu, select “Printer Operation”:



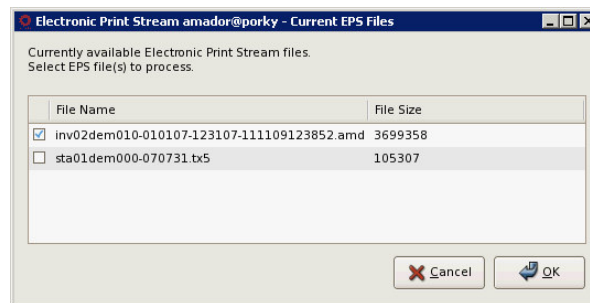
8. From the Printer Menu, click on “Electronic Post Office”. Click on the “OK” button to continue:



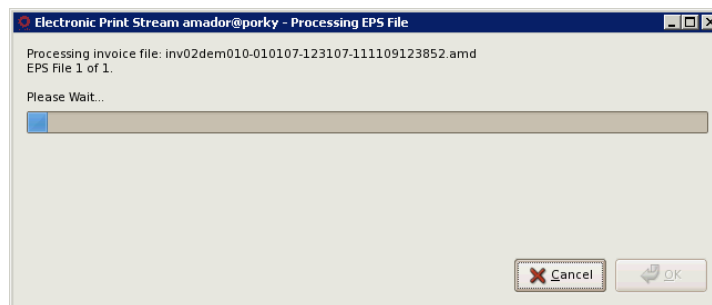
9. On the “EPS Processing” menu, select “Process EPS Files” to prepare the invoices for sending via EPO. Click on the “OK” menu to continue:



10. Find your invoice run(s) (created in steps 4 to 6.) The file name is made up with the following parts, “inv02CCCnnn-MMDDYY-mmddyy-MMDDYYHHMM.bbb”, where “CCC” is the company code, “nnn” is the branch invoice prefix, “MMDDYY” is the first date in the date range selected during the Reprint Invoice Process, “mmddyy” is the last date in the date range selected during the Reprint Invoice Process, “MMDDYYHHMM” is the date and time (24-hour format) on which the Reprint Invoice Process was run and “bbb” is the branch code. Check the box next to the file you wish to process to check it. You can select more than one invoice EPS file if you wish. Click on the “OK” button to continue:

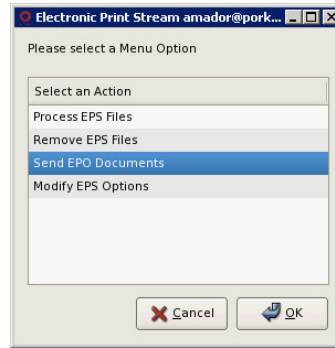


11. The “EPS File Processing Summary” screen will appear once the EPS file is processed. Click on the “OK” button to continue:

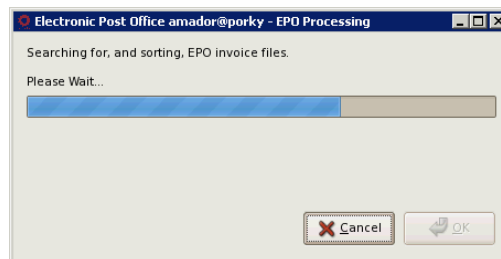
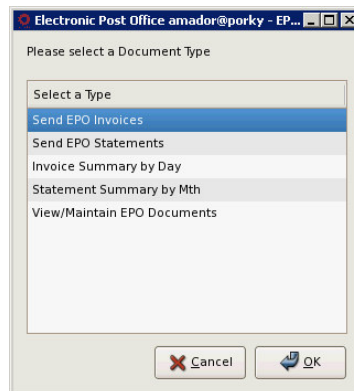


3.2.3 Sending EPO invoice files

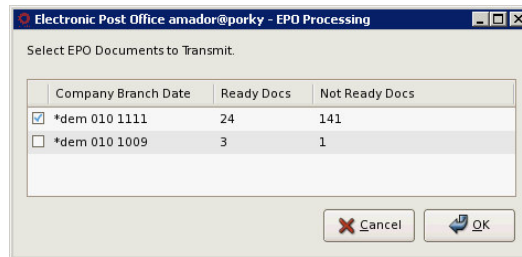
12. After processing the EPS file, the “EPS Processing” menu will re-appear. Click to highlight the item, “Send EPO Documents”, and then click on the “OK” button to continue:



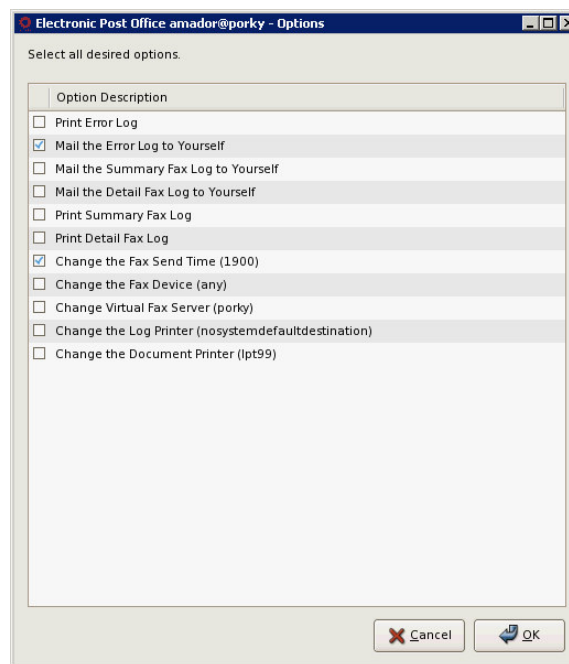
13. Click to select “Send EPO Invoices”. Click on the “OK” button to continue:



14. The next step is selecting the EPO Documents to Transmit. Click on the box next to your EPO batch to select it. Click on the “OK” button to continue:



15. A second screen with EPO Transmit Options will appear. Check the box(es) next to the option(s) you wish to change. Usually only options 2, 4 and 7 are needed. This screen will only appear once in the sending process, so be sure to select all the options you wish to change. Click on the “OK” button to continue:



- Print Error Log – Select this option to send the error log to the log printer.
- Mail the Error Log to Yourself – Select this option to send the error log to your **AutoPoint®** mailbox.
- Mail the Summary Fax Log to Yourself – Select this option to send the summary fax log to your **AutoPoint®** mailbox.
- Mail the Detail Fax Log to Yourself – Select this option to send the detailed fax log to your **AutoPoint®** mailbox.
- Print Summary Fax Log – Select this option to send the summary fax log to the log printer.
- Print Detail Fax Log – Select this option to send the detailed fax log to the log printer.
- Change the Fax Send Time – The time in parenthesis is the default send time. Select this option to change the send time (24 hour format.)
- Change the Fax Device – Do not change this option.
- Change Virtual Fax Server – Do not change this option.

- Change the Log Printer – Do not change this option.
- Change the Document Printer – Do not change this option.

16. Once the options have been set, a results screen will appear showing which customers have been sent which documents and by which methods (e-mail, fax, print):

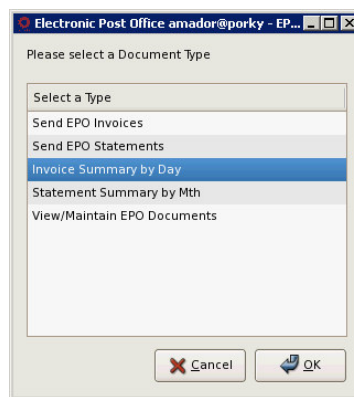
3.3.0 Confirming Transmission of Documents via EPO

3.3.1 Checking e-mail/faxed submissions using the EPO menu.

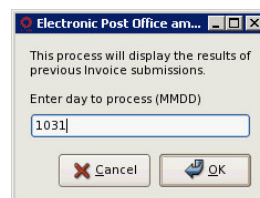
You can check whether an invoice or statement was successfully e-mailed or faxed from the EPO processing menu.

To get to this menu from *AutoPoint*®,

- Click on the Hot Menu from the menu bar in the Main Menu.
- Select Tools → Printer Operation.
- Select “Electronic Post Office”, then “Send EPO Documents”.

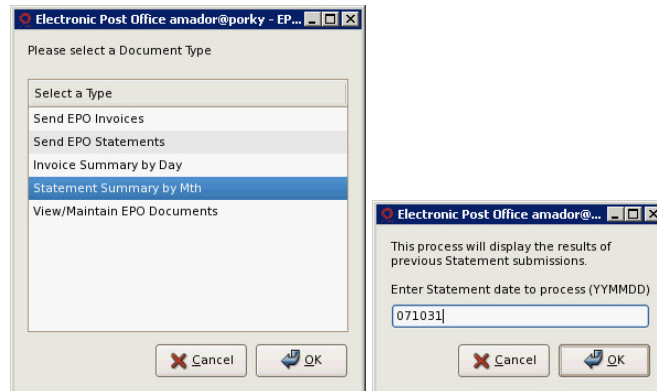


To see what invoices were sent on a particular day, select the option “Invoice Summary by Day”. Enter the date the invoice EPS file was created (not necessarily the same date the invoices were sent) in the MMDD format:



A second pop-up will ask whether you wish to show failures only (Y) or all submissions (N). This will display the invoices that were faxed or e-mailed, and whether the submission was successful. Use the arrow keys to scroll through the list.

To see what statements were sent for a particular month, select the option “Statement Summary by Mth”. Enter the last date in the date range of the Print Statements run, which is the month-end date of the statements (in the YYMMDD format):



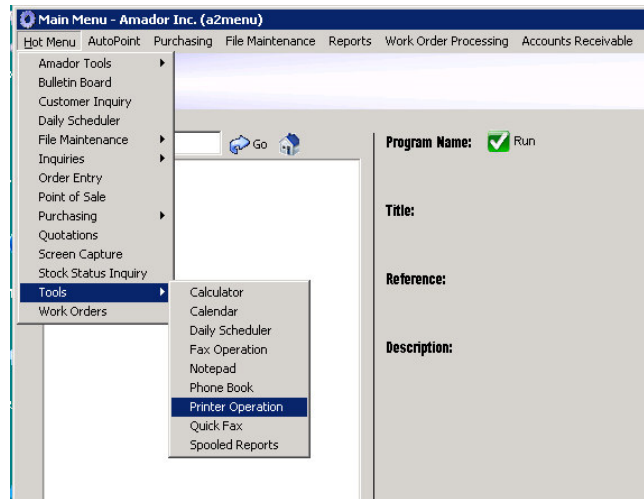
A second pop-up will ask whether you wish to show failures only (Y) or all submissions (N). This will display the statements that were faxed or e-mailed, and whether the submission was successful. Use the arrow keys to scroll through the list:

NOTE: The entries for e-mail submissions do not show whether the document was received or not. They only show that the e-mail was generated and sent, and a submission error will mean there was a problem with generating the document or there was something wrong with the syntax of the e-mail address.

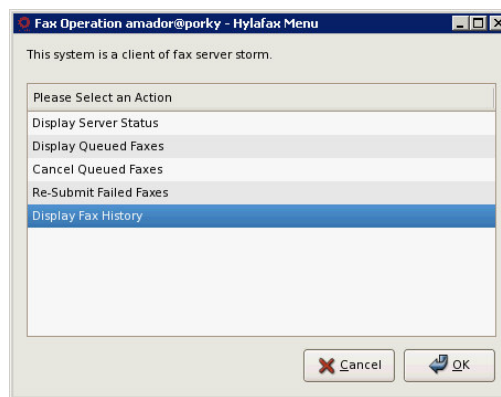
3.3.2 Checking faxed submissions using the Fax Operations menu

You can check whether an invoice or statement was successfully faxed from the “Fax Operations” menu for Hylafax users.

To get to this menu from *AutoPoint*®, click on the Hot Menu drop-down menu in the Main Menu window. Select Tools → Fax Operation:



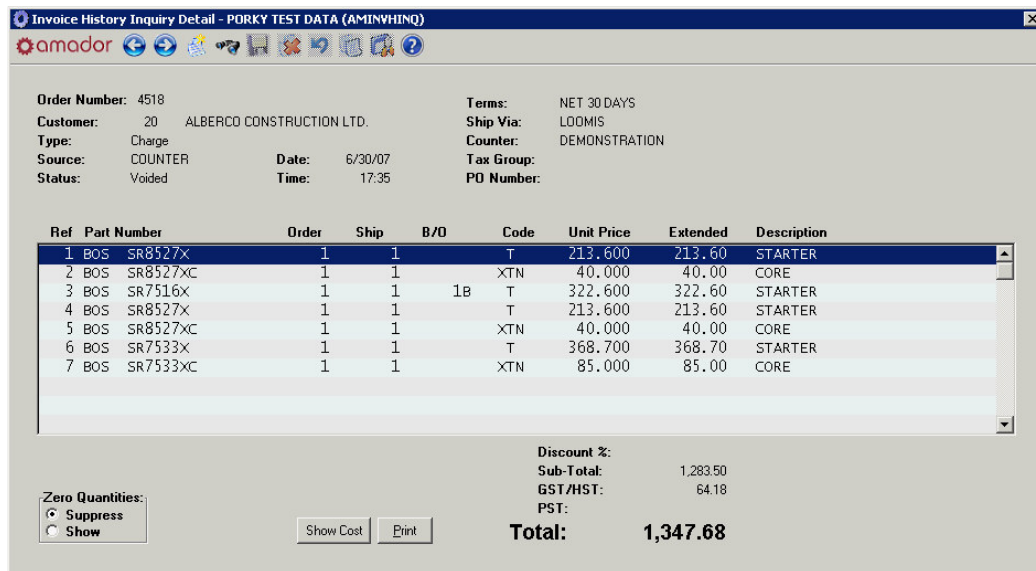
The menu “Hylafax Menu” will appear, giving the options to view the server status, display queued faxes, cancel queued faxes, resubmit failed faxes and display fax history. Select the option for the action you wish to perform, or select “Cancel” to return to *AutoPoint*®.



3.3.3 Re-sending invoices and statements

If an invoice or statement was missed, failed to send or is requested by the customer, it can be re-sent outside of the regular EPO batch run.

For re-faxing an invoice, look up the invoice from history using Invoice History Inquiry. On finding the invoice, click on the “Print” button. Select the fax’s printer number, and from the QuickFax screen, enter the recipient’s name and fax number.



Invoice History Inquiry Detail - PORKY TEST DATA (AMINVINQ)

Order Number: 4518 Terms: NET 30 DAYS
 Customer: 20 ALBERCO CONSTRUCTION LTD. Ship Via: LOOMIS
 Type: Charge Date: 6/30/07 Counter: DEMONSTRATION
 Source: COUNTER Time: 17:35 Tax Group:
 Status: Voided PO Number:

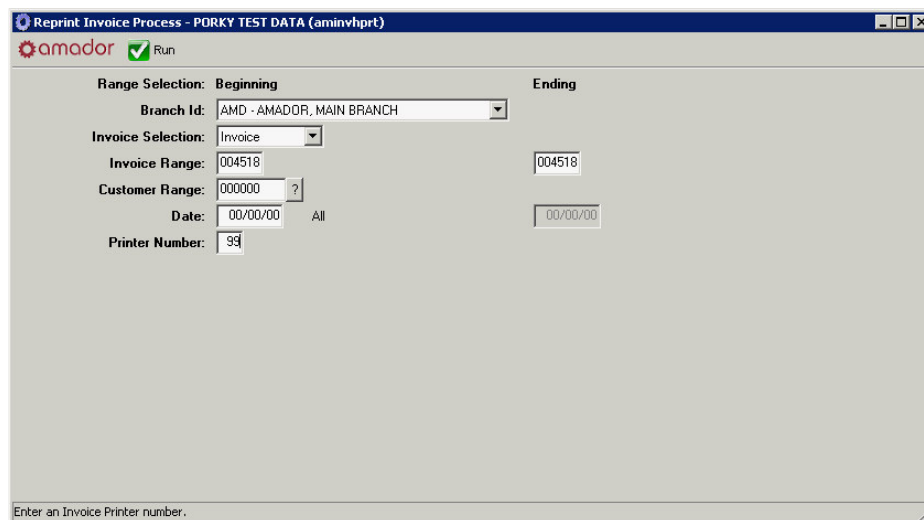
Ref	Part Number	Order	Ship	B/O	Code	Unit Price	Extended	Description
1	BOS SR8527X	1	1		T	213.600	213.60	STARTER
2	BOS SR8527XC	1	1		XTN	40.000	40.00	CORE
3	BOS SR7516X	1	1	1B	T	322.600	322.60	STARTER
4	BOS SR8527X	1	1		T	213.600	213.60	STARTER
5	BOS SR8527XC	1	1		XTN	40.000	40.00	CORE
6	BOS SR7533X	1	1		T	368.700	368.70	STARTER
7	BOS SR7533XC	1	1		XTN	85.000	85.00	CORE

Discount %:
 Sub-Total: 1,283.50
 GST/HST: 64.18
 PST:
Total: 1,347.68

Zero Quantities:
 Suppress
 Show

Show Cost Print

For e-mailing one or more invoices, go to the program AMINVHPRT from the “Select:” prompt, and enter the customer number and range of invoices to re-send. For the printer number, enter the PDF printer number that creates PDFs to your DOS folder:



Reprint Invoice Process - PORKY TEST DATA (aminvhprt)

Run

Range Selection: Beginning Ending

Branch Id: AMD - AMADOR, MAIN BRANCH

Invoice Selection: Invoice

Invoice Range: 004518 004518

Customer Range: 000000 ?

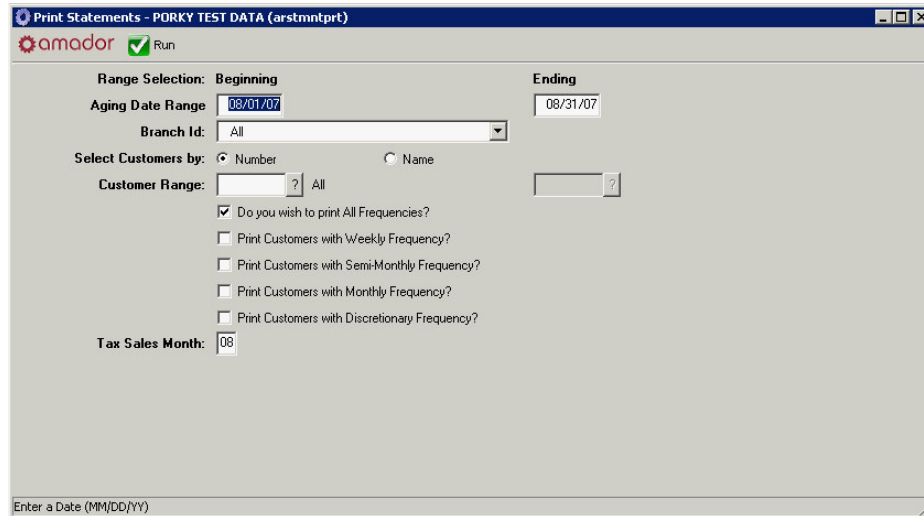
Date: 00/00/00 All 00/00/00

Printer Number: 99

Enter an Invoice Printer number.

For re-faxing or re-emailing a statement, you must use the statement print program from the A/R menu AM040407. No EPS file is generated, so rather than using printer 777, you would use the PDF printer number (and then attach

the PDF to an e-mail message manually) or fax printer number. Also, instead of selecting all customers in ARSTMNTPRT, you would only select the one customer you wish to re-send the statement to.



Print Statements - PORKY TEST DATA (arstmntprt)

amador Run

Range Selection: **Beginning** **Ending**

Aging Date Range: 08/01/07 08/31/07

Branch Id: All

Select Customers by: Number Name

Customer Range: All

Do you wish to print All Frequencies?

Print Customers with Weekly Frequency?

Print Customers with Semi-Monthly Frequency?

Print Customers with Monthly Frequency?

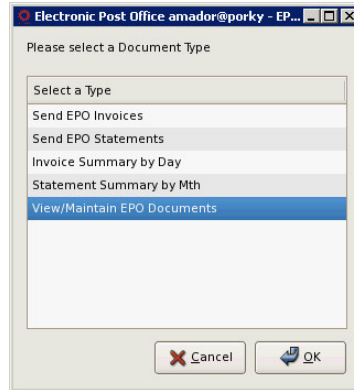
Print Customers with Discretionary Frequency?

Tax Sales Month: 08

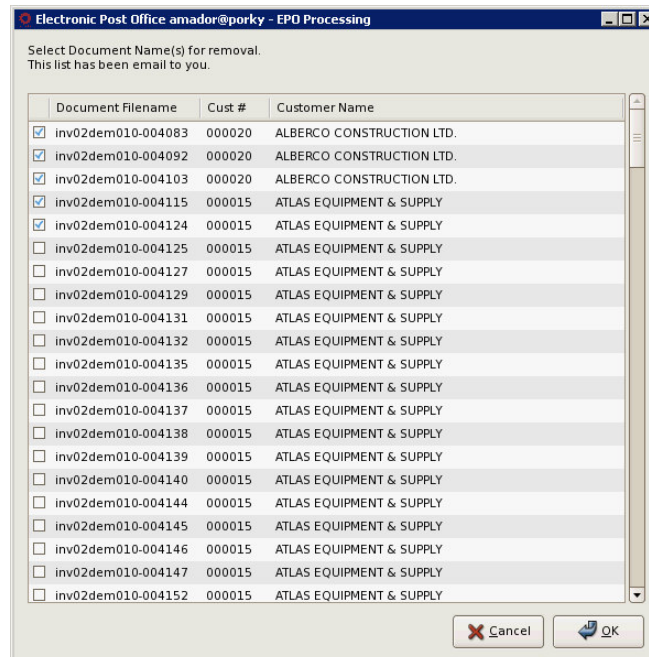
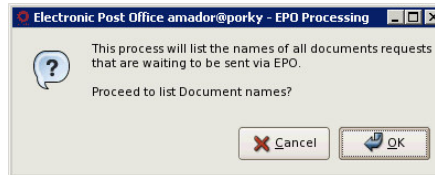
Enter a Date (MM/DD/YY)

3.3.4 View/Maintain EPO Documents

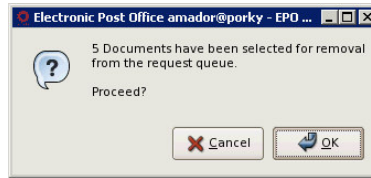
At least once a month, you will want to clear out old EPO processing files. To do this, go to the Hot Menu from *AutoPoint®* by clicking on it from the menu bar on the Main Menu. Select Tools → Printer Operation. Select the option “Electronic Post Office” from the Printer Menu, and then select “Send EPO Documents”. On the “EPO Processing” menu, select “Request Queue Cleanup” and then click on the “OK” button:



Click on “OK” to continue (otherwise click on “Cancel” to cancel.) A list of documents will appear. Select the documents to delete by checking the boxes next to them:



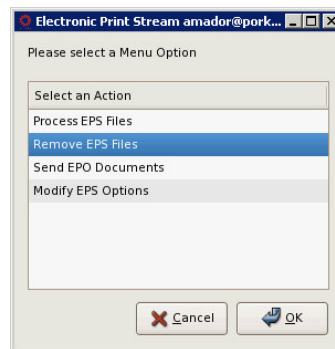
Click on “OK” to continue to the following summary and confirmation screen:



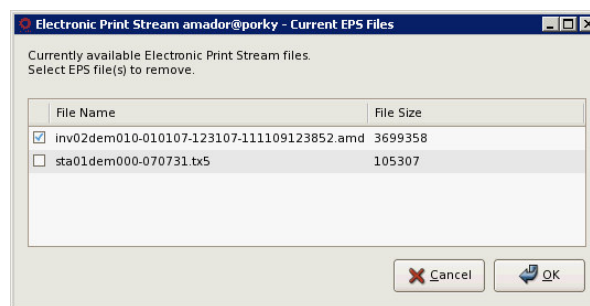
Click on “OK” to continue, otherwise click on “Cancel” to exit without deleting any documents.

3.3.5 Removing EPS files

To prevent old or failed EPS files from being reprocessed, use the following steps to remove them. Go to the Hot Menu from *AutoPoint®* by clicking on it in the menu bar on the Main Menu. Select Tools → Printer Operation. Select the option “Electronic Post Office” from the Printer Menu, and then select “Remove EPS Files”:



A list of EPS files for invoices and statements will appear. Select the files you wish to delete checking the boxes next to them (invoice files begin with “inv” and statement files begin with “sta”.) Click on the “OK” button to continue or click on “Cancel” to cancel:



3.4.0 Including Flyers with the EPO Send

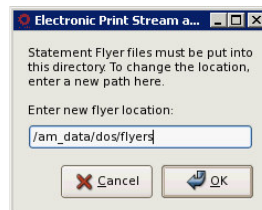
Attaching flyers as an e-mail attachment or sending them via fax (or any other document in the PDF or TIFF file formats) along with the statements sent via EPO is as simple as dropping the files in the default flyer file location. Statements printed with the EPO send will not have the flyers printed as well; the flyers for ground mail customers will have to be printed separately.

By default, statement flyers are sent via fax and e-mail. Including flyers with statements will significantly increase the time to send, and faxing flyers will use the recipient's toner and paper. Faxing of flyers can be disabled by contacting Amador.

NOTE: When creating the PDF or TIFF file, the flyer should be in the 8 ½" X 11 " page format and high contrast B/W for faxing. For e-mailing, the page format and colour scheme are not restricted, but the file size should be kept as small as possible (i.e. <1 MB.)

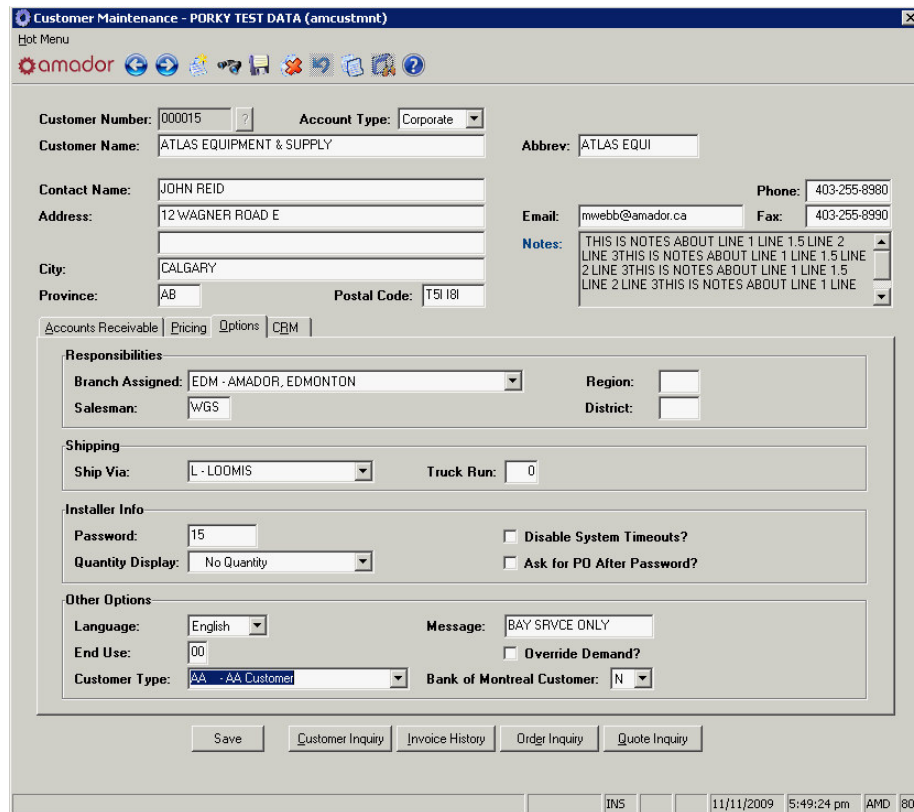
3.4.1 Setting the default folder for flyers

To send flyers (or any PDF or TIFF document) as attachments with statements sent via EPO, you will need to specify the default folder where these attachments can be found. To do this, go to the Hot Menu from **AutoPoint®** by clicking on it in the menu bar from the Main Menu. Select Tools → Printer Operation. Select the option "Electronic Post Office" from the Printer Menu, and then select "Modify EPS Options". From the EPS Options menu, select "Modify Flyer File Location". The default location should be "/am_data/dos/flyers":



3.4.2 Creating and saving flyers by customer type

The first step in setting flyers is to confirm the location on the **AutoPoint®** server where the default flyer file is location (see previous page.) This folder will be accessible from a Windows PC by the mapped “DOS” drive (if you do not have the mapped drive set up on your PC, please contact Amador Support.) On the mapped drive you will find a folder called “flyers”, and this is the location to save the flyers in the PDF or TIFF file formats for customers that are not set up with a customer type.



Customer Maintenance - PORKY TEST DATA (amcustmnt)

Hot Menu

Customer Number: 000015 Account Type: Corporate

Customer Name: ATLAS EQUIPMENT & SUPPLY Abbrev: ATLAS EQUI

Contact Name: JOHN REID Phone: 403-255-8980

Address: 12 WAGNER ROAD E Email: mwebb@amador.ca Fax: 403-255-8990

City: CALGARY

Province: AB Postal Code: T5J 1B1

Notes: THIS IS NOTES ABOUT LINE 1 LINE 1.5 LINE 2
LINE 3 THIS IS NOTES ABOUT LINE 1 LINE 1.5 LINE
2 LINE 3 THIS IS NOTES ABOUT LINE 1 LINE 1.5
LINE 2 LINE 3 THIS IS NOTES ABOUT LINE 1 LINE

Accounts Receivable Pricing Options CBM

Responsibilities

Branch Assigned: EDM - AMADOR, EDMONTON Region:

Salesman: WGS District:

Shipping

Ship Via: L - LOOMIS Truck Run: 0

Installer Info

Password: 15 Disable System Timeouts?

Quantity Display: No Quantity Ask for PO After Password?

Other Options

Language: English Message: BAY SRVCE ONLY

End Use: 00 Override Demand?

Customer Type: AA - AA Customer Bank of Montreal Customer: N

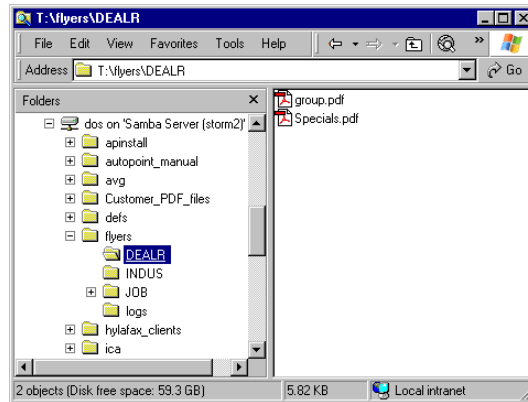
Save Customer Inquiry Invoice History Order Inquiry Quote Inquiry

INS 11/11/2009 5:49:24 pm AMD 802

NOTE: Customer Types are assigned in customer maintenance (AACUSTMNT) in the “Options” tab. The type can be any five or fewer characters, except for HOUSE, TEST, XFER, EMP or PAID, and must first be set up in AMCUSTYMNT.

If you wish to send flyers to a particular group of customers, it is possible to send different sets of flyers by customer type. To do this, you must create subfolders under the “flyers” folder that are named exactly the same as the customer types assigned in customer maintenance. This feature can be used to prevent certain customers from receiving flyers by assigning them to a customer type and leaving the corresponding folder empty.

NOTE: The name of the flyer folder and the customer type must match exactly, and this includes their case: if the customer type is in upper case (EG: “JOBBER”), the folder name must also be in upper case; if the customer type is in upper-lower case (EG: “Jobber”), the folder name must also be in upper-lower case.



Once these subfolders are created, you can save PDF and TIFF files to them, and these will be sent to those customers of that type, exclusively. For example, you have a flyer that you want to send to all customers without a type assigned to them, and a different flyer to all customers assigned to the JOB type. The no-customer-type flyer will be saved in the “flyers” folder, and the JOB-type flyer will be saved in the “flyers/JOB” subfolder. The appropriate flyer will then be sent when you do your EPO statement run.

3.4.3 Sending flyers with the EPO statement send

Including flyers with the EPO statement run is as simple as saving the PDF or TIFF files in the appropriate folders when you are ready to send out the statements.

NOTE: Avoid using spaces or special characters in the PDF or TIFF file name, as these will cause the e-mail generation to fail.

The EPO send process will check these folders and include anything found there. Be sure to delete or move these files if you do not wish to include them with the next statement run.