Eclipse Fax System

Release 8.6.3 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.3 Online Help System

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Eclipse Fax System Overview

VSI-FAX is a TCP/IP faxing engine integrated with Eclipse, which fax-enables all of your business documents, such as invoices, statements, bids, acknowledgments, purchase orders, trackers, and memos. Use the Eclipse fax system to increase productivity and reduce costs by eliminating inefficient paper-centric communications and processes.

Any document that you can print from the Eclipse system, you can also fax if you have installed the VSI-FAX Gold software. For example, you can set up the system to fax invoices to customers rather than printing and mailing them. After creating a report, send it as a fax. You can enter a message on the cover sheet that accompanies a faxed document or send the cover sheet and message without any attachments.

Use the VSI-FAX Gold software to connect to modems and transmit documents and messages as faxes. Use the Eclipse Fax System programs to create, send, receive, and manage faxes.

Four major components comprise the Eclipse Fax System:

Assigning Fax Devices

Before you can send faxes from the Eclipse system, you must assign one or more fax delivery systems, which we call fax devices.

For more information, see Assigning Fax Devices Overview.

Fax Memo

Use the Fax Memo program to send faxes. Use this program to set up the fax cover sheet, identify the fax recipients, and append documents to the fax.

For more information, see Fax Memo Overview.

Outgoing Fax Status Queue

Use the Outgoing Fax Status Queue to manage faxes sent from your company. Use this functionality to make sure that all faxes are sent. You can also watch for instances where a fax is not sent due to wrong numbers, busy phone lines, or any other problems which arise while sending faxes.

For more information, see Outgoing Fax Status Queue Overview.

Incoming Fax Status Queue

Use the Incoming Fax Status Queue to manage images that have been faxed into the Eclipse Fax System. Use these images to create logos, signatures, append documents, and forms.

For more information, see Incoming Fax Status Queue Overview.

VSI-FAX Gold Software Basics

The Eclipse fax system uses VSI-FAX Gold software.

VSI-FAX Gold is primarily an outgoing fax system. You can also fax images into the system in order to create append documents, fax logos, and fax signatures to attach to faxes.

- An append document is an image of a document, such as a sales order or flyer, that you can attach to outgoing faxes.

- A fax logo is a branch-specific image that displays on the header of the faxes you send.

- A fax signature is an image of your signature that you can add to the end of a fax memo.

VSI-FAX Gold also includes *client software*. Use client software to send and receive faxes without having a modem or phone line on your PC. It uses the same server, phone lines, and modem that your Eclipse system uses. The client software resides on everyone's PCs so they can send faxes from their PCs using the VSI-FAX Gold server.

The VSI-FAX Gold server can receive all faxes at one number for everyone in the company and be used as a repository for these faxes. Any PC with client software can display these faxes.

Additionally, the client software can keep track of user names and IDs. This function allows the company to limit users' viewing to only the faxes addressed to them. If you do not remember which document a number indicates, you can also use the client software to view the image.

VSI-FAX Gold comes with five client software licenses. Any of the five licensed users can use the software at the same time. You can purchase additional client software licenses in quantities of 5, 25, or unlimited copies for an additional charge.

See Also:

Eclipse Fax System Overview

Setup Requirements for the Eclipse Fax System

Following are the control maintenance records and authorization keys for the fax system programs.

Control Maintenance Records

Set the following control maintenance records:

- Branch Fax Cover Sheet
- Default Fax Start Time
- Department Fax Code Maintenance

Authorization Keys

Assign the following authorization keys:

- FAX.ALLOWED
- FAX.APPEND.DOC
- FAX.PRIORITY
- FAX.RESET
- FAX.STATUS

See Also:

Eclipse Fax System Overview

Assigning Fax Devices Overview

For any fax delivery system you want to use with the Eclipse system, you must define it and assign a name, make, and model to it. Because it is computer software rather than a machine that is sending the faxes, we refer to the fax delivery system as a fax device.

You can assign multiple fax devices. For example, each branch of your company can direct outgoing faxes to a different fax device.

The following topics explain how to assign fax devices:

- Assigning Fax Devices
- Assigning Loadable Forms to Fax Devices
- Entering Fax Setup Information
- Defining Branch Access to Fax Devices
- Testing Fax Phone Numbers
- Defining Local or Toll Exchanges for Fax Devices
- Telephone Dialing Logic

See Also:

Eclipse Fax System Overview

Assigning Fax Devices

Use the Assign Printer/Fax screen to define a fax device for use with the system or edit the values assigned to a fax device. The system stores the following information about the assigned fax devices:

- A name assigned to the device.
- The manufacturer's make and model.
- Parameters that govern operations of fax devices.

Use the following procedures to:

- Assign a fax device.
- Edit the values assigned to a fax device.

▶**To assign a fax device:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter **new** to display a prompt for the fax ID.

3. At the prompt, enter a fax ID up to five characters long. The ID must include the word **fax**. If the ID has already been used, the information for that fax device displays.

4. In the **Name** field, enter a name for the fax ID.

   The name can be up to nine characters long. It can be a number or contain numbers. We recommend using a name that has meaning.

5. In the **Printer Type** field, press **F10** and select the make and model of the printer that offers print compatibility with the fax device. The selected make and model must support PCL.

   Note: Define printer makes and models during system installation.

6. In the **Printer/Fax** field, enter **Fax**.

7. In the **Description** field, enter a description of the fax device.

8. In the **Printer Path** field, enter the network path to the shared printer or fax device.

   The system converts forward slashes to back slashes, as you cannot enter back slashes in the Eterm environment and they are required to reference a network path.

9. Leave the **Macro Enabled (Y/N)** field set to **N**. This field applies only to printers.

10. Use the **Loadable Forms** hot key to assign a loadable form to the fax device.

11. Use the **Fax Setup** hot key to enter fax setup information.

12. Press **Esc** to save the information and exit the screen.

▶**To edit a fax device assignment:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, press **F10** and select the fax ID from the list.

    The system populates the screen with the selected item's information.

3. Edit the fields as needed.

4. To delete a fax assignment, use the **Delete** hot key.

    The system prompts you to confirm the deletion.

5. Press **Esc** to save the information.

See Also:

Assigning Fax Devices Overview

Assigning Loadable Forms to Fax Devices

Use the Loadable Forms screen to assign the form available for use with a fax device.

▶**To assign the loadable form to a fax device:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter the ID of the fax machine you are setting up.

3. Use the **Loadable Forms** hot key to display the Loadable Forms screen.

4. Position the cursor on a blank line, press **F10**, and select the form called **FAX**.

   Note: To delete this form from the list, position the cursor on the form and press **Alt-Delete**.

5. Press **Esc** to save this information and return to the Assign Printer/Fax screen.

See Also:

Assigning Fax Devices

Entering Fax Setup Information

Fax setup information governs telephone line operation, defines the company branches that are authorized to send a fax, and identifies the fax system you use. The Eclipse software supports the VSI-FAX Gold system.

After defining fax phone number settings, test the fax phone numbers to ensure that the dialing setup information works correctly.

▶**To enter fax setup information:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter the ID of the fax device to set up.

3. Use the **Fax Setup** hot key to display the Fax Setup screen.

4. In the **Fax Type** field, press **F10** and select **VSI-FAX Gold** as the fax system to use.

5. Leave the **Feedback** field blank.

6. In the **Home Area Code** field, enter the area code for your company's phone system.

7. In the **Dialing Logic** field, press **F10** and select the dialing logic that is compatible with your phone system.

8. In the **Resolution** field, press **F10** and select the resolution to use.

   - **Normal** – Conserves toner and prolongs cartridge life.

   - **Fine** – Provides maximum print resolution.

   Note: We recommend selecting **Fine**, because it is more readable.

9. In the **Exchanges are** field, press **F10** and select whether to define local or toll exchanges for your company's local area codes. You can select either option. We recommend selecting the option for which you will create the shorter list.

   - **Local** – Select this option if most of the exchanges within your local area codes are toll exchanges. Then use the **Local Exchanges** hot key to define the local exchanges within your company's local area codes.

   - **Toll** – Select this option if most of the exchanges within your local area codes are local exchanges. Then use the **Toll Exchanges** hot key to define the toll exchanges within your company's local area codes.

10. Use the **Local Exchanges** or **Toll Exchanges** hot key, depending on the value selected in the **Exchanges are** field, to define the local or toll exchanges for your company's local area codes.

11. If required, in the **Dialing Prefix** field, enter the prefix necessary to get an outside fax line for a fax transmission.

12. Use the **Branches** hot key to define branch access to this fax device.

13. Press **Esc** twice to save the fax setup and other assignment information for the fax device.

See Also:

Testing Fax Phone Numbers

Assigning Fax Devices Overview

Defining Branch Access to Fax Devices

The fax system can direct outgoing faxes to different fax devices depending on the branch from which the faxed documents originate.

Use the Multiple Br/Tr Selection screen to define which branches have access to a fax device. If you do not assign branches to a fax device, then all branches can access it.

▶**To define branch access to a fax device:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter the ID of the fax device to set up.

3. Use the **Fax Setup** hot key to display the Fax Setup screen.

4. Use the **Branches** hot key to display the Multiple Br/Tr Selection screen.

5. In the **Br/Terr** column, enter the branches or territories to which to give access to this fax device.

6. Press **Esc** to save this information and return to the Fax Setup screen.

See Also:

Assigning Fax Devices

Entering Fax Setup Information

Testing Fax Phone Numbers

After defining fax phone number settings during fax setup, use the Test Fax Phone Numbers screen to test the phone numbers to ensure that the dialing setup information works correctly.

For example, when setting up a fax phone number you can define the following:

- Dialing Logic: **10 Digit**

- Prefix: **1**

- Home Area Code: **303**

Then you need to test that the system dials the phone number **938-8801** correctly. When you enter the number **9388801**, the system should display the number **1-303-938-8801** as the number it will dial.

If the system returns with an incorrect number, you can edit the fax setup dialing logic and prefix.

▶**To test a fax phone number:**

1. From the **System > System Files > Printer Setup** menu, select **Test Fax Phone Numbers** to display the Test Fax Phone Numbers screen.

2. In the **Branch** field, enter the branch for which to test the fax phone number.

3. In the **Number** field, enter the phone number to test. If the area code for this phone number is different from that defined on the Fax Setup screen, include the area code.

   Note: Do not include punctuation with the fax number. For example, for the phone number **303-938-8801**, enter **3039388801**.

   The system displays the number it will dial in the **Number to be Dialed** field and the fax device for which it is dialing in the **Printer** field.

4. If the number is not what you expect the system to dial, do the following:

   - Use the **Configure Printers** hot key to display the Assign Printer/Fax screen, where you can edit the setup information.

   - Enter the fax device to test and then use the **Fax Setup** hot key to display the Fax Setup screen.

   - Edit the settings defined on that screen.

5. Once you have determined that the fax phone number settings are correct, re-test the fax phone number.

See Also:

Assigning Fax Devices

Entering Fax Setup Information

Defining Local or Toll Exchanges for Fax Devices

When setting up a fax device for the system, you need to enter telephone exchange information.

For each *local area code* in which your company resides, identify which exchanges within the area code are local and which are toll. Identify the area code and then create a list of either the local exchanges or toll exchanges within the area code.

- If most of the exchanges within a local area code are toll exchanges, create a list of the local exchanges.

- If most of the exchanges within a local area code are local exchanges, create a list of the toll exchanges.

►**To create a list of local exchanges:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter the ID of the fax device to set up.

3. Use the **Fax Setup** hot key to display the Fax Setup screen.

4. In the **Exchanges are** field, press **F10** and select **Local**.

5. Use the **Local Exchanges** hot key to display the Area Code screen.

6. Do one of the following:

   - Select **New**, enter an area code at the prompt, and press **Enter**.

   - Select an area code and press **Enter.**

   The Local Exch's screen displays.

7. Enter the local exchanges and press **Esc**.

   - If you create a list of local exchanges, the system considers all *other* exchanges within that area code to be *toll* exchanges.

   - If you do not list any exchanges on the Local Exch's screen for an area code, the system considers all exchanges for that area code to be *local* exchanges.

   Note: If you change the entry in the **Exchanges are** field, the exchange numbers in the Local Exch's list do not change. The system then interprets those numbers in the opposite way they were previously interpreted.

►**To create a list of toll exchanges:**

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.

2. In the **Printer/Fax #** field, enter the ID of the fax device to set up.

3. Use the **Fax Setup** hot key to display the Fax Setup screen.

4. In the **Exchanges are** field, press **F10** and select **Toll**.

5. Use the **Toll Exchanges** hot key to display the Area Code screen.

6. Do one of the following:

    - Select **New**, enter an area code at the prompt, and press **Enter**.

    - Select an area code and press **Enter.**

    The Toll Exch's screen displays.

7. Enter the toll exchanges.

    - If you create a list of toll exchanges, the system considers all *other* exchanges within that area code to be *local* exchanges.

    - If you do not list any exchanges on the Toll Exch's screen for an area code, the system considers all exchanges for that area code to be *toll* exchanges.

    Note: If you change the entry in the **Exchanges are** field, the exchange numbers in the Toll Exch's list do not change. The system then interprets those numbers in the opposite way they were previously interpreted.

See Also:

Entering Fax Setup Information

Telephone Dialing Logic

For the Eclipse system to send a fax, you need to identify the dialing logic that is compatible with your company's phone system. Depending on where your company is located, you dial local calls with 7 digits or 10 digits, and you dial toll calls with or without using the prefix **1**.

The following table explains each dialing logic option. If you are not sure which dialing logic to select, contact your local phone company.

Dialing Logic	Home Area Code Local Call	Other Local Area Code Local Call	Non-Local Toll Call
7 Digit	EXC-NUM	AC-EXC-NUM	1-AC-EXC-NUM
10 Digit	AC-EXC-NUM	AC-EXC-NUM	1-AC-EXC-NUM
Never 1	EXC-NUM	AC-EXC-NUM	AC-EXC-NUM

Where:

- AC = The three-digit area code.
- EXC = The exchange number, which includes the first three digits of the seven-digit phone number.
- NUM = The last four digits of the seven-digit phone number.

See Also:

Entering Fax Setup Information

Testing Fax Phone Numbers

Fax Memo Overview

Throughout the system you can use the **Fax** hot key to send a message or document as a fax. You can also set up the system to send documents such as bids or sales orders as faxes. In both cases, use the Fax Memo program to set up the fax that you want to send.

Use the Fax Memo program to do any of the following:

- Type a message or include a standard message on the fax cover sheet.

- Send the same fax to a single recipient or multiple recipients using fax distribution lists that you have created or the system has built.

- Attach documents to your faxes, such as bids, credit applications, invoices, or statements. When you fax statements to multiple customers, the system uses the following hierarchy to check for active, working fax numbers:

  - The system first checks the Customer Maintenance program to determine the appropriate fax number to use for ship-to customers.

- If the **Use Ship-To Address (Y/N)** field on the Alternate Billing Address screen is set to **Y** (Yes), then the system uses the number in the Contacts area on the Customer Maintenance screen that is set to FAX. If there is no fax number present, then the system displays an error message.

- If the **Use Ship-To Address (Y/N)** field on the Alternate Billing Address screen is set to **N** (No), then the system uses the number in the **Fax** field on the Alternate Billing Address screen. If there is no fax number present, then the system displays an error message.

  - Then the system checks the Customer Maintenance program to determine the appropriate fax number to use for bill-to customers.

- If the **Use Ship-To Address (Y/N)** field on the Alternate Billing Address screen is set to **Y** (Yes), then the system uses the number in the Contacts area on the Customer Maintenance screen that is set to FAX. If there is no fax number present, then the system displays an error message.

- If the **Use Ship-To Address (Y/N)** field on the Alternate Billing Address screen is set to **N** (No), then the system uses the number in the **Fax** field on the Alternate Billing Address screen. If there is no fax number present, then the system displays an error message.

The following topics explain how to use the Fax Memo functions:

- Sending Faxes

- Adding Signatures to Faxes

- Designating Fax Recipients

- Creating Fax Distribution Lists

- Building Fax Distribution Lists

- Using Fax Distribution Lists

- Appending Documents to Faxes

- Sending Broadcast Faxes

- Fax Priorities

See Also:

Eclipse Fax System Overview

Sending Faxes

Use the Fax Memo screen to set up and send faxes. Identify the fax recipients and include the message to send. You can also attach documents to the fax.

▶**To send a fax:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

   Note: You can also display the Fax Memo screen using the **Fax** hot key on many other screens. When you do that, the system may populate the **Cust/Ven** or **Contact** field.

2. Designate a fax recipient or use a fax distribution list as the recipient.

   If you use a distribution list as the fax recipient, the system displays ***Distribution List*** in the **To** field.

3. To append a document to the fax, use the **Append** hot key.

4. In the **Fax Time** field, enter the time at which to send the fax.

   By default, the system displays the time entered in the Default Fax Start Time control maintenance record.

5. Complete the remaining fields in the header section of the screen as needed.

Field	Description
Br# Header	The branch from which the system is sending the fax. You can send a fax from any branch to which you have access. When you fax documents such as orders or invoices, the system populates this field with the pricing branch for the order. This field can be populated with the branch you have defined for the fax device. This field is required to send a fax.
Priority	Priority assigned to the fax. For more information, see Fax Priorities. By default the system assigns the lowest priority. If needed, press **F10** and select a new priority.
Cover Sheet	Indication whether the fax contains a cover sheet and attached document. The default value is **Only**. When you append a document to the fax, the entry in this field changes from **Only** to **W/Document**. • **Only** – Fax contains only the cover sheet and its message. • **W/Document** – Fax contains a cover sheet and attached document. • **None** – Fax contains only the attached document and no cover sheet.
Fax Date	Date on which to send the fax. The default value is the current date.
Time Zone	Time zone associated with the **Fax Time** field. The default value is the time zone assigned to your user ID.

Field	Description
From	User sending this fax. By default, the system populates this field with your name.

6. Enter the message to display on the fax cover sheet in any of the following ways:

    - In the **Message** field, type the message.

    - Use the **Sel User Comments** hot key to display the User/Company (*) Defined Comments screen, which lists the user's defined comments followed by the company's defined comments. When you select a comment and press **Enter**, the comment is added to the fax message.

    - Use the **Edit User Comments** hot key to display the User Comments Maintenance screen, where you create or edit standard user-defined or company-defined comments. You can add these comments to a fax cover sheet message.

7. To print a copy of the fax cover sheet and message, use the **Print** hot key.

8. Press **Esc** to send the faxes to the Outgoing Fax Status Queue for transmission at the indicated time.

See Also:

Fax Memo Overview

Designating Fax Recipients

You can send a fax to a customer, vendor, contact, or individual using the **Cust/Ven**, **Contact**, or **To** fields on the Fax Memo screen.

The fax system provides the following options for sending faxes:

- If you display the Fax Memo screen from an order document, the system obtains the customer bill-to name or vendor pay-to name from the order.

- If you fax invoices or statements, the system supplies the customer names.

- If you display the Fax Memo screen from the menu, these fields are blank.

The following tasks explain how to designate the following as fax recipients:

- Customer, vendor, or one of their contacts

- Contact

- Individual

To send a fax to multiple recipients, see Using Fax Distribution Lists.

▶**To designate a customer, vendor, or one of their contacts as a fax recipient:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. In the **Cust/Ven** field do one of the following:

    - Type a customer or vendor ID number preceded by a period.

    - Type all or part of a customer or vendor name. The system displays either the complete name and fax number or a list from which you can select a name and fax number.

    The system populates the **Cust/Ven** and **Fax #** fields with the fax contact name and phone number from the record, if one exists, and makes an entry in the entity's change log.

    If the selected account is a ship-to/ship-from without a fax number defined, the system uses the bill-to/pay-to account's fax phone number and makes an entry in that entity's change log.

    Otherwise the system populates the **Cust/Ven** field with the account name and the **Fax #** field with 999-999-9999. Update the fax number as needed. The system makes an entry in the entity's change log.

3. To assign a contact linked to the selected customer or vendor as the fax recipient, use the **List Contacts** hot key to display the list of contacts and then select one.

    The system populates the **Contact** and **Fax #** fields with the contact's name and fax phone number.

4. To complete the process of sending a fax, see Sending a Fax.

▶**To designate a contact as a fax recipient:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. In the **Contact** field, enter all or part of the contact's name and select the name from the list of matching entries.

   The system populates the **Contact** and **Fax #** fields with the contact's name and fax phone number, if one exists. If the contact record does not have a fax number defined, the system enters 999-999-9999 in the **Fax #** field. Update the number as needed.

3. To complete the process of sending a fax, see Sending a Fax.

▶**To designate an individual as a fax recipient:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. In the **Fax #** field, enter the individual's fax phone number.

3. In the **To** field, enter the individual's name.

4. To complete the process of sending a fax, see Sending a Fax.

See Also:

Using Fax Distribution Lists

Creating Fax Distribution Lists

Building Fax Distribution Lists

Fax Memo Overview

Creating Fax Distribution Lists

Use the Fax Distribution List screen to create a list of recipients to whom you can send the same fax as a single process.

The following tasks explain how to:

- Create fax distribution lists of individuals.

- Create fax distribution lists of customers and vendors.

- Edit previously created and saved fax distribution lists.

To have the system build a fax distribution list using the selection capabilities of the Report Writer/Mass Load program, see Building a Fax Distribution List.

▶**To create a fax distribution list by entering names and fax numbers:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. In the **To** column, enter the name of each recipient.

4. In the **Fax #** column, enter each recipient's fax number.

    Note: If the fax phone number does not conform to a format recognized by the system, the number is dialed as displayed.

5. Use the following hot keys as needed:

Hot Key	Description
Clear All	Displays a **Clear List (Y/N)** prompt for you to clear the displayed names and numbers off the screen.
Save	Saves the displayed list of names and numbers under a unique Work ID.
Build	Directs the system to build a fax distribution list using the selection capabilities of the Report Writer/Mass Load program.

6. Press **Esc** to return to the Fax Memo screen.

    The system displays *****Distribution List***** in the **Fax #** and **To** fields.

7. To complete the process of sending a fax, see Sending Faxes.

▶**To create a fax distribution list using customer and vendor account fax numbers:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. On a blank line in the **To** field, do one of the following:

- Type a forward slash (**/**) or exclamation point (**!**) followed by all or part of a customer or vendor name and press **Enter**. If multiple name matches exist, the system displays a list of company names from which to choose.

- Type a forward slash followed by a period (**/.**) and the customer or vendor number and press **Enter**. If the company has multiple fax numbers, the system prompts you to select a fax number or contact name.

The system displays the customer or vendor contact name in the **To** field and the fax phone number in the **Fax #** field.

Note: If the phone number in the **Fax #** field does not conform to a recognized format, the system dials the number as displayed.

4. To add additional names and numbers to the list, repeat the previous step.

5. To save the list, use the **Save** hot key. At the prompt enter a unique Work ID, which can be used to recall the saved list.

   The system displays the ID in the upper left border of the screen.

6. Press **Esc** to return to the Fax Memo screen.

   The system displays *****Distribution List***** in the **Fax #** and **To** fields.

7. To complete the process of sending a fax, see Sending Faxes.

▶**To edit a previously saved fax distribution list:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. Use the **Recall** hot key to recall to the screen a list of names and numbers that have been saved under a unique Work ID.

   - If only one Work ID exists, the list displays.

   - If multiple Work IDs exist, a Recall Work ID prompt displays. Type a **Work ID** name or press **F10** to select from a list of existing Work IDs.

4. Edit the list of names and fax phone numbers as needed.

5. To delete items included under a Work ID, select a name and use the **Spacebar**, the **Backslash** key (\), or the **Delete** key.

6. To delete the displayed distribution list, use the **Delete** hot key. The system prompts you to type **delete** to confirm the deletion.

7. When you finish editing the list, use the **Save** hot key. At the **Save list as** prompt, do one of the following:

   - Press **Enter** to save the list under the given name.

   - Type a new name and press **Enter**.

8. Press **Esc** to return to the Fax Memo screen.

The system displays *****Distribution List***** in the **Fax #** and **To** fields.

9. To complete the process of sending a fax, refer to the topic Sending Faxes.

See Also:

Sending Broadcast Faxes

Appending Documents to Faxes

Fax Memo Overview

Building Fax Distribution Lists

Use the Build A Distribution List screen to have the system build distribution lists of fax recipients using the selection capabilities of the Report Writer/Mass Load program.

For example, you can set up the system to build a distribution list of customers who are plumbers. The system selects records from the CUSTOMER file based on your report writer selection criteria.

In another example, the system can build a list based on the customers for which you have outstanding job quotes. The system selects records from the JOB.QUOTE file based on your report writer selection criteria and then accesses the corresponding CUSTOMER records to pick up the fax number.

The following tasks explain how to:

- Build a fax distribution list.

- Edit a saved fax distribution list.

▶**To build a fax distribution list:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. Use the **Build** hot key to display the Build A Distribution List screen.

4. Complete the fields displayed on the screen as follows:

Field	Description
Customer/Contact	Press **F10** and select one of the following as the source for fax recipients: • **Contact** – Selects names from the Contact file. • **Customer** – Selects names from the Entity file.
Design ID	Enter an ID up to 17 characters long to identify the list.
File Name	Press **F10** and select from a list of file names available on your system. This parameter identifies the name of the file containing the information to be used to construct the list.
Title of List	Enter a title up to 20 characters long to assign to the list.

5. Use the **Selection Build** hot key to display the Report Writer/Mass Load Selection screen, where you set the criteria for selecting the records whose corresponding customer or contact fax numbers can then be selected for the distribution list.

   For more information about this screen, see Using the Report Writer/Mass Load Selection Screen.

6. Press **Begin Sel** to execute the selection criteria.

7. Press **Esc** to return to the Build a Distribution List screen.

8. To save the displayed screen under a work ID, use the **Save Work ID** hot key.

9. Press **Esc** to save your changes and return to the Fax Distribution List screen.

▶**To edit a saved fax distribution list:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. Use the **Build** hot key to display the Build A Distribution List screen.

4. In the **Design ID** field, press **F10** and select the saved ID.

5. Edit the fields displayed on the screen or the report writer selection criteria as needed.

6. To delete the displayed design ID, use the **Delete Work ID** hot key. The system prompts you to type **delete** to confirm the deletion.

7. Press **Esc** to save your changes and return to the Fax Distribution List screen.

See Also:

Creating Fax Distribution Lists

Using Fax Distribution Lists

Fax Memo Overview

Using Fax Distribution Lists

When you are ready to send a fax, you can recall a distribution list and send your fax to multiple recipients at the same time. From the Fax Memo screen, you can access any distribution lists that you have created.

▶**To use a fax distribution list:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to display the Fax Distribution List screen.

3. Use the **Recall** hot key to display the **Recall list** prompt.

4. At the prompt press **F10**, select the list to use, and press **Enter**.

   The system displays the names and fax numbers from the selected list on the Fax Distribution List screen.

5. To use a different list, do the following:

   - Use the **Clear List** hot key to remove the current list.

   - Then use the **Recall** hot key again to select a different list.

6. When you are satisfied with the chosen list, press **Esc** to exit the screen and return to the Fax Memo screen.

   The system displays *****Distribution List***** in the **Fax #** and **To** fields.

7. To complete the process of sending a fax, see Sending Faxes.

See Also:

Creating Fax Distribution Lists

Building Fax Distribution Lists

Fax Memo Overview

Appending Documents to Faxes

Use the Append Documents screen to append documents to a fax. You can append documents such as credit applications or invoices.

Before you can append documents to faxes, you must create append documents using the Incoming Fax Status Queue.

▶**To append documents to a fax:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Append Documents** hot key to display the Append Documents screen.

3. For each document to append to the fax, do the following:

    *   Position the cursor on a blank line.

    *   Press **F10** to display a list of documents that can be appended to the fax.

    *   Select a document.

    *   Press **Enter**.

    Note: If you use Eclipse Document Imaging, you can only fax images saved as a **tif** file with a **CCITT Group 3** or **Group 4** compression setting.

4. Press **Esc** to return to the Fax Memo screen.

5. To complete the process of sending a fax, see Sending Faxes.

See Also:

Sending Faxes

Fax Memo Overview

Sending Broadcast Faxes

Broadcast faxes send the same message and attachment to multiple recipients.

Use the Fax Memo and Fax Distribution List screens to send broadcast faxes.

▶**To send a broadcast fax:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

2. Use the **Distribution List** hot key to use a fax distribution list or create a fax distribution list and then return to the Fax Memo screen.

3. Complete the Fax Memo screen header fields as follows:

Field	Description
Cust/Ven	Leave this field blank. The system uses the distribution list.
Contact	Leave this field blank. The system uses the distribution list.
Fax #	This field displays ***Distribution List***.
Br# Header	Leave this field blank.
Fax Time	Enter the time at which to send the fax.
Priority	Press **F10** and select the priority to assign to the fax.
Cover Sheet	If you are appending a document to the fax, the entry in this field changes from **Only** to **W/Document** when you press **Esc** at the Append Documents screen.
Fax Date	Enter the date on which to send the fax. The default value is the current date.
Time Zone	If necessary, change the time zone to associate with the **Fax Time** field. The default value is the time zone assigned to your user ID.

4. Edit the cover sheet fields as follows:

Field	Description
To	This field displays ***Distribution List***.
From	This field displays your name as the person sending the fax. You can change this entry if needed.

5. In the **Msg** field, enter the fax message.

6. If appending documents to the fax, use the **Append Documents** hot key.

7. Press **Esc** to send the faxes to the Outgoing Fax Status Queue for transmission at the indicated time.

See Also:

Sending Faxes

Creating Fax Distribution Lists

Fax Priorities

The priority assigned to a fax determines how the system positions it in the Outgoing Fax Status Queue.

Four priorities can be assigned to a fax: Low, Medium, High and Urgent. These names correspond respectively to levels 1, 2, 3 and 4 of the FAX.PRIORITY authorization key.

The system assigns a default priority of Low to all faxes. To assign a higher priority to a fax, you must be assigned the FAX.PRIORITY authorization key with a level greater than one. When you select a priority, only the priorities available to your ID display.

See Also:

Fax Memo Overview

Managing the Outgoing Fax Status Queue

Outgoing Fax Status Queue Overview

The Outgoing Fax Status Queue displays faxes you send through your system. The queue displays a status for each outgoing fax, such as whether the fax is transmitting, the phone line for the fax is busy, or the fax transmission is unsuccessful. Expired faxes display at the end of the queue.

Each employee should monitor the queue daily to manage their outgoing faxes and follow up on faxes that expire before the system sends them. A designated employee should monitor the queue for all users on a weekly basis to ensure that expired faxes are resolved in a timely fashion.

Three VSI-FAX Gold parameters affect how long a fax remains active before it expires:

- The number of attempts per each submission. The default value is 5.

- The expiration time. The default value is 60 minutes.

- The time between retries. The default value is 5 minutes.

You can also use the queue to conduct a preliminary investigation when the VSI-FAX Gold system has a problem. Your company must have a phone line dedicated to VSI-FAX Gold.

The following topics explain how to use the Outgoing Fax Status Queue:

- Managing the Outgoing Fax Status Queue

- Outgoing Fax Statuses

See Also:

Eclipse Fax System Overview

Managing the Outgoing Fax Status Queue

Use the Outgoing Fax Status Queue to view and manage outgoing faxes. You can view up-to-the-minute outgoing fax status, as well as stop or reschedule outgoing faxes.

The FAX.STATUS authorization key determines which faxes you can view:

- **Level 1** – Only your own faxes.

- **Level 2** – Faxes being sent by all users.

Each employee should monitor the queue daily to manage their outgoing faxes and follow up on faxes that expire before being sent.

▶**To manage the Outgoing Fax Status Queue:**

1. From the **System > Printers** menu, select **Outgoing Fax Status Queue** to display the Outgoing Fax Status Queue screen.

2. In the **User** field, which displays your user ID, do one of the following:

   - To display your own scheduled faxes, press **Enter**.

   - To display another user's faxes, enter their user ID.

   - To display all scheduled faxes, clear the **User** field and press **Enter**.

   The system displays the scheduled faxes, first according to send time and then, within send time, from highest to lowest priority. Expired faxes display at the bottom of the screen. The dates and times shown on the screen are in the user's time zone, displayed in the **Time Zone** field, or the system time zone if one is not defined for the user in User Maintenance.

   The following information displays for each fax:

Field	Description
User	ID of the user sending the fax.
Submitted	Date and time the fax was submitted.
Status	Where the fax is in the sending process.
Att	Total number of unsuccessful attempts made to send the fax.
Pri	Priority assigned to the fax.
Q Seq	Sending sequence of the fax. This field can be blank, display a number that indicates the sending order within active fax entries, or display **exp** if the fax has expired. **Note:** An expired fax requires manual intervention. Cancel it or modify the sending parameters and reactivate it with the **Retry** hot key.
Phone #	Fax number of the recipient. **Note:** If you change this field, include any dialing prefixes along with the fax phone number.

Field	Description
Description	Contact, company, sales order number, purchase order number, or transfer order number related to the fax. The order number displays if the order is faxed or acknowledged from an order entry screen.

3. If a fax has failed, do any of the following:

   - Check the fax number to be sure it is accurate.

   - If necessary, use the **Phone** hot key to edit the fax number. Then create a tracker to have the customer or vendor record permanently updated.

   - Use the **Retry** hot key to change the expired status and place the fax back in the active queue.

   - If the fax continues to time out, contact the company to which you are trying to send the fax for assistance.

4. Use the following hot keys to manage the queue as needed:

Hot Key	Description
Retry	Changes the status of the fax to **Waiting** and places the fax back in the active queue. Use this hot key to resend a fax that did not transmit.
Cancel	Cancels and deletes the fax from the queue. The system prompts you to confirm the cancellation, which is immediate. **Note:** After canceling a fax, give the system a few seconds to refresh the entries on the screen before using the **Cancel** hot key again.
Priority	Displays a prompt to change the priority of the fax. Press **F10** to select from a list of priorities. The system places the fax in the queue according to the send time and new priority.
Schedule	Displays a prompt to change the scheduled transmission time and date assigned to the fax. The system places the fax in the queue according to the new send time, send date, and the priority.
Phone	Displays a prompt to change the fax number. Changes made using this hot key are for this fax only; they do not update other records in the system.
View	Displays the Fax Memo screen in view-only mode, so you can view the fax message. **Note:** To modify the content of a fax before it transmits, cancel and then recreate it.
Status	Displays the Eclipse Fax Status screen, which provides information to Eclipse Support when you have a fax problem that you can't solve. When functioning properly, the following message displays at the top of the screen: The fax scheduler is running. Faxes queued for transmission display at the bottom of the screen. If a system reboot occurs, the message **Not Running** displays under **State**. When the message **Modem server keeps dying** displays under **Devices**, Eclipse Support should address the problem.

Hot Key	Description
Reset	Halts and reschedules all outgoing faxes. At the **Continue?: Y/N** prompt, enter **Y**. The reset takes a minute or less.
	Use this hot key after rebooting your system or if VSI-FAX Gold is not functioning properly.
	Note: For this hot key to be active, you must be assigned the FAX.RESET authorization key.

5. Press **Esc** to exit the queue.

See Also:

Outgoing Fax Statuses

Outgoing Fax Status Queue Overview

Outgoing Fax Statuses

The following table describes the statuses that the fax system can assign to outgoing faxes.

You can view the status of faxes in the **Status** field on the Outgoing Fax Status Queue screen.

Status Type	Description
• **NOTFAX** • VOICE	The fax system called the number and was answered but did not think that the receiving machine was a fax machine.
• **BADMDM** • FIMDIE • FIMERR • FIMUNA • NOFILE • SCHERR	Fax system error. Call Eclipse Support.
BADIMG	Configuration error. Indicates that you tried to append a document or logo that the Eclipse system thinks you have but the fax system does not think you have. If you can fix it, do so. Otherwise, call Eclipse Support.
Bad Data	Eclipse system error. Call Eclipse Support.
Busy	Last attempt received a busy signal when the system dialed the number.
Dialing	Fax system is dialing the number.
Fax Config	Fax setup error. Call Eclipse Support.
Halted	Someone used the **Halt** hot key to stop the fax before it transmitted. A **Halted** fax displays **exp** (expired) in the **Q Seq** field and goes to the bottom of the queue. If you use VSI-FAX Gold, this hot key is not active.
Line Drop	The phone line disconnected while the fax was transmitting.
Maxtry	The system reached the maximum number of attempts to send the fax. At that point, the fax displays **exp** (expired) in the **Q Seq** field. **Maxtry** should never display in the **Status** field without **exp** in the **Q Seq** field.
MODIFY	The priority phone send time was modified. This status is transitory, and you may see it only briefly.
Negotiating	The dialing, answering, sending, and receiving protocols are in process. Most often you do not see this status displayed.
No Answer	The system dialed the number but did not receive an answer. After the indicated maximum number of attempts without an answer, the status might be **Maxtry**.
NODIAL	The fax system did not get a dial tone.
REMREJ	The remote (receiving) fax machine rejected the fax.
Retry	The fax is retired.
Sending	The fax is in the process of transmitting. A number indicates the page that is transmitting.
Timed Out	A problem occurred with the fax, typically with the receiving modem.

Status Type	Description
UNDER	Hardware setup error. The fax system was not sending data to the modem fast enough. If this status occurs frequently, call Eclipse Support.
Waiting	The fax is waiting to reach the top of the queue to be sent.

See Also:

Managing the Outgoing Fax Status Queue

Outgoing Fax Status Queue Overview

Incoming Fax Status Queue Overview

The Incoming Fax Status Queue stores images that you have faxed into the system. You can convert these images into one of the following:

- Logos for each branch of your company.

- Signatures for each user in your company.

- Append documents to attach additional information, such as a credit application or sales flyer, to your faxes.

You can then attach logos, signatures, and append documents to the faxes the system sends.

The following topics explain how to use the Incoming Fax Status Queue:

- Fax Logo Overview

- Fax Signature Overview

- Append Document Overview

See Also:

Eclipse Fax System Overview

Using the Incoming Fax Status Queue

Selecting Images from the Incoming Fax Status Queue

Using the Incoming Fax Status Queue

Use the Incoming Fax Status Queue to create the following images to enhance your faxes:

- Logos for each branch of your company.

- Signatures for each user in your company.

- Append documents to attach additional information to your faxes.

When you fax a logo, signature, or document to the VSI-FAX Gold modem number, the system stores the image in the Incoming Fax Status Queue and assigns **in** as the image type. You can then use hot keys to process the image and change the image type to **logo**, **sig**, or **doc**.

▶**To use the Incoming Fax Status Queue:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

    The dates and times shown on the screen are in the user's time zone, displayed in the upper right corner of the screen, or the system time zone if one is not defined for the user in User Maintenance.

    Only documents with **in** as the image type display. To display other document types, use the **Type** hot key.

    The following table describes the information displayed for each image:

Field	Description
Date	• Date when the fax was received, for **in** image type. • Date when the image was created, for **doc** image type.
Time	• Time when the fax was received, for **in** image type. • Time when the image was created, for **doc** image type.
Pg/Ln	• Number of lines in the image, which indicates the amount of vertical space occupied by the image, for **sig** or **logo** image type. • Number of pages in the image, for **in** or **doc** image type.
Res	Resolution used by the sender of the image. For best results, we recommend using **fine**. • Fine • Standard
Type	The kind of image: **in**, **doc**, **logo**, **sig**, **form**, or **all**. When the system receives an image, it assigns **in** as the image type. By default, the queue lists only the documents with **in** as the image type. Use the **Type** hot key to list the other types of images.

Field	Description
File Name	Name assigned to the image. File names for the **in** image type are system-generated. When you create an append document, fax logo, or signature, rename the image.
Sender Info	Fax number or name of the sender, for **in** image type.
IT (Image Type)	Whether the image can be used by VSI*FAX or VSI-FAX Gold. • **F** – VSI*FAX • **G** – VSI-FAX Gold **Note:** The Eclipse system uses only VSI-FAX Gold.

2. Select the image to process.

3. Use the following hot keys as needed:

Hot Key	Result
Fax	Displays the Fax Memo screen, which you use to fax the selected item. Use this hot key to send test faxes to yourself.
Delete	Deletes the item on which the cursor is positioned. The system prompts you to confirm the deletion. • If you delete the logo image for a branch, it does not display on the Fax Logo Management screen or on a fax sent from the branch. • If you delete a document image, the system removes it from any append document that included that image. An append document that has no assigned images displays on the Append Docs screen but not on the list of append documents for the Fax Memo screen.
Make Doc	Displays the Make Append Document screen, where you create append document images to be assigned to append documents.
Make Logo	Displays the Make Logo screen, where you create fax logos to be printed on fax cover sheets. **Note:** To add a logo and other information to other types of documents, such as invoices, statements, and purchase orders, contact Eclipse Support.
Make Sig	Displays the Make Signature screen, where you create a fax signature that can be added to fax memos you send.
Type	Displays the Types selection list, from which to choose the type of images to display in the Incoming Fax Status Queue. • **In** – Displays a list of all faxed images available for conversion to a logo, signature, or document image. • **Doc** – Displays a list of file names of all converted document images. • **Logo** – Displays a list of file names of all converted logo images. • **Sig** – Displays a list of file names of all converted signature images. • **Form** – This option is no longer used. • **All** – Shows all of the above.

Hot Key	Result
Fax Queue	Displays the Outgoing Fax Status Queue with the scheduled faxes that you are authorized to view.
Manage Append Docs	Displays the Append Docs screen, where you can create append documents.
Manage Logos	Displays the Logo Management screen, where you can assign fax logos to branches of your company.
Time Zone	Displays a list of time zones, from which you can select a new time zone in which to display the fax dates and times.

4. Press **Esc** to exit the queue.

See Also:

Incoming Fax Status Queue Overview

Creating Fax Logos

Creating Fax Signatures

Creating Append Document Images

Creating Append Documents

Selecting Images from the Incoming Fax Status Queue

Identifying a faxed-in image in the Incoming Fax Status Queue can be difficult, because the file names are system-generated numbers. We recommend that you use the date and time stamp to identify the correct item. The system lists images in chronological order.

If you don't know what an image is, select the image and use the **Fax** hot key to fax it to yourself, or use the VSI-FAX Gold client software to see what it is.

See Also:

Using the Incoming Fax Status Queue

Fax Logos Overview

Faxes sent from the Eclipse system can display a branch logo across the top of the fax cover sheet. The logo must be stored as an image in the Incoming Fax Status Queue. After you create and store a fax logo, assign it to a branch. When the system sends a fax, it uses the logo stored for the branch from which the fax was generated.

The following topics explain how to create and use fax logos:

- Creating Fax Logos
- Assigning Fax Logos to Branches
- Deleting Fax Logos from Branches

See Also:

Incoming Fax Status Queue Overview

Creating Fax Logos

Use the Incoming Fax Status Queue to create logo images for all of your company's branches. After you assign the logos to branches, the logos display on the cover sheets of the faxes you send.

▶**To create a fax logo:**

1. With copy of the logo or letterhead in hand, do the following:

   - Measure down from the top of the page to just *above* the logo image and record the measurement in inches.

   - Measure down from the top of the page to just *below* the logo image and record the measurement in inches.

   - Calculate the height of the logo image by subtracting the first measurement from the second measurement.

2. Fax a copy of the logo to the VSI*FAX Gold modem number. Be sure to set the resolution on the fax machine to **fine**.

3. The system sends the image to the Incoming Fax Status Queue and assigns **in** as the image type.

4. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

5. Select the logo image and use the **Make Logo** hot key to display the Make Logo screen.

6. The system populates all the fields except **File Name** with default entries.

7. Edit the following fields as needed:

Field	Description
Top	Number of inches from the top of the page to the top of the logo. The default value is .50 inches. If the default value does not match your measurement, enter your measurement.
Height	Height of the logo in inches. The default value is 2.00 inches. If this is not compatible with your measurement, enter the height you calculated.
Left Margin	Distance from the left edge of the page to the beginning of the logo. The default value is 0.00 inches. Do not change this field.
Lines	Number of lines used by the logo, based on the height of the logo. The system populates this field. To increase the space between the logo and the text that follows, increase this number.
File Name	Enter a name for the logo. The name can be up to 12 alphanumeric characters with no spaces.

8. Use the **Fax** hot key to display the Fax Memo screen.

9. Send the fax to yourself.

    The system returns you to the Make Logo screen.

10. Review the fax.

    The fax displays the logo image. Below the logo is a dashed line across the page. This line indicates where the text on fax cover sheet begins. Check the amount of space between the bottom of the logo and the dashed line.

    If the logo is not satisfactory, try other measurements and send another test fax. Repeat as necessary until the logo spacing is satisfactory.

11. Once the logo is satisfactory, press **Esc** to save the logo and return to the Incoming Fax Status Queue screen.

    The system changes the file type to **logo**.

    Note: To view all the fax logos stored in the queue, use the **Type** hot key and select the **logo** option.

See Also:

Fax Logos Overview

Assigning Fax Logos to Branches

Deleting Fax Logos from Branches

Assigning Fax Logos to Branches

Each branch of a company can have its own logo displayed on the faxes sent from that branch.

After creating fax logos, use the Fax Logo Management screen to assign logos to the different branches of your company.

▶**To assign a fax logo to a branch:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

2. Use the **Manage Logos** hot key to display the Fax Logo Management screen.

3. To assign a logo to a branch, position the cursor in the line next to the branch to which to assign a logo image, press **F10**, and select a logo from the list.

   The system displays the **Logo Name** and **Height** (number of lines) of the logo.

4. Repeat the process for each branch.

5. Press **Esc** to save the logo assignments.

   Note: Fax logos print on the fax cover sheets for the branch to which they are assigned. They do not print on other documents such as statements or invoices.

See Also:

Fax Logos Overview

Creating Fax Logos

Deleting Fax Logos from Branches

Deleting Fax Logos from Branches

Faxes sent from each branch in the company can have their own logo. When a logo for a branch changes, you need to delete the assigned logo and then assign the new logo to the branch.

Use the Incoming Fax Status Queue to delete a fax logo from a branch.

▶**To delete a logo from a branch:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

2. Use the **Manage Logos** hot key to display the Fax Logo Management screen.

3. Position the cursor on the logo name to delete and press the **Space Bar** or the **Delete** key until all characters are gone. Pressing **Alt-Delete** does not delete the name.

4. Press **Esc** to return to the Incoming Fax Status Queue screen.

See Also:

Fax Logos Overview

Creating Fax Logos

Assigning Fax Logos to Branches

Fax Signatures Overview

Each user can append an image of their signature to the faxes they send. The signature must be stored as an image in the Incoming Fax Status Queue. When you append a signature to faxes, the system selects the correct signature based on this signature-to-user assignment.

The following topics explain how to create and use fax signatures:

- Creating Fax Signatures

- Adding Signatures to Fax Memos

See Also:

Incoming Fax Status Queue Overview

Creating Fax Signatures

A fax signature is a signature image that users can add to the faxes they send. Use the Incoming Fax Status Queue to create and store fax signatures.

▶**To create a fax signature:**

1. On a blank sheet of white paper, write your signature in the upper left corner.

2. With the image in hand, do the following:

    - Measure down from the top of the page to just *above* the signature image and record the measurement in inches.

    - Measure down from the top of the page to just *below* the image and record the measurement in inches.

    - Calculate the height of the signature image by subtracting the first measurement from the second measurement.

3. Fax the page with the signature to the VSI-FAX Gold modem number. Be sure to set the resolution on the fax machine to **fine**.

    The system sends the image to the Incoming Fax Status Queue and assigns **in** as the image type.

4. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

5. Select the signature image and use the **Make Sig** hot key to display the Make Signature screen.

    The system populates all the fields except **User ID** with default entries.

6. Edit the following fields on the screen as needed:

Field	Description
Top	Number of inches from the top of the page to the top of the signature. The default value is .70 inches. If the default value does not match your measurement, enter your measurement.
Height	Height of the signature in inches. The default value is 1.00 inches. If this is not compatible with your measurement, enter the height you calculated.
Left Margin	Distance from the left side of the page to the beginning of the signature. The default value is 0.00 inches. If you positioned your signature away from the left edge of the page, measure from the left edge to the signature and enter that measurement.
Lines	Number of lines used by the signature, based on the height of the signature. The system populates this field. After testing the signature for correct spacing, to increase the space between the signature and whatever is typed below it on the fax memo, increase this number.
User ID	Enter the user ID to which assign the signature.

7. Use the **Test** hot key to display the Fax Memo screen.

8. Send the fax to yourself.

    The system returns you to the Make Signature screen.

9. Review the fax.

    The fax displays the signature image. Below the signature is a dashed line across the page. This line indicates where any text on the fax cover sheet following the signature will begin. Check the amount of space between the bottom of the signature and the dashed line.

    If the signature is not satisfactory, try other measurements, and then send another test fax. Repeat as necessary until the signature and spacing are satisfactory.

10. Once the signature is satisfactory, press **Esc** to save the information and return to the Incoming Fax Status Queue screen, where the user ID becomes the file name for the signature.

    The system changes the file type to **sig**.

    Note: To view all the fax signatures stored in the queue, use the **Type** hot key and select the **sig** option.

See Also:

Adding Signatures to Fax Memos

Fax Signatures Overview

Adding Signatures to Faxes

After you have created a fax signature, you can append the signature to fax memos that you write.

▶**To add a signature to a fax:**

1. From the **System** menu, select **Fax Memo** to display the Fax Memo screen.

   Note: You can also display the Fax Memo screen using the **Fax** hot key on many other screens.

2. In the **Message** field, do the following:

   - Type your message.

   - Skip a line and type a closing, such as *Sincerely*.

   - On the next line, type +**sig**. The system interprets this command as *place the signature here.*

   - On the next line, type your name.

   The system adds the correct amount of space to accommodate the signature.

3. To complete the process of sending a fax, see Sending Faxes.

See Also:

Creating Fax Signatures

Fax Memo Overview

Append Documents Overview

An append document is a document, such as a credit application or sales flyer, that you can attach to an outgoing fax. The document must be stored as an image in the Incoming Fax Status Queue.

Creating an append document and making it available to be attached to a fax is a two-step process.

- First, create an append document image.

  Before creating append document images, you'll need to determine which document image parameters you need to use for the machine used to fax in the images.

- Second, assign the image to an append document.

The system stores append document images and append documents in the Incoming Fax Status Queue.

The following topics explain how to create and use append documents:

- Determining Append Document Image Parameters

- Creating Append Document Images

- Creating Append Documents

- Editing Append Documents

- Deleting Append Documents

See Also:

Incoming Fax Status Queue Overview

Sending Faxes

Determining Append Document Image Parameters

The first step in creating an append document is faxing an image of the document into the system. The fax machine adds a header to the page, which you need to remove. Some fax machines add this header to the top of the page and move the original image down on the page. Other fax machines overlay the original image with this header.

To remove the header when you create the append document image, enter a value in the **Top** field and select the **Clear** or **Cut** option. To determine which option to use, we recommend that you run a test.

The test document should contain an image or text that comes within one half inch of both the top and bottom of the paper. After faxing the document into the system, send two test faxes, with one using the **Clear** option and the other using the **Cut** option. Compare the results and determine which option gives you the better result.

Use the following procedure to determine which parameters to use for faxing images into the system.

▶**To determine append document image parameters:**

1. Fax a copy of the document to the VSI-FAX Gold modem number. Be sure to set the resolution on the fax machine to **fine**.

    The system sends the image to the Incoming Fax Status Queue and assigns **in** as the image type.

    Note: The VSI-FAX Gold modem number is determined when your system administrator sets up the software. For more information, see Assigning Fax Devices Overview.

2. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

3. Select the faxed-in image and use the **Make Doc** hot key to display the Make Append Document screen.

    The system populates the **Top** field with default entries of **.50** inches and **Clear**.

    It is not necessary to complete the **File Name** field at this point.

4. Use the **Test** hot key to display the Fax Memo screen.

5. Send the fax to yourself.

    The system returns you to the Make Append Document screen.

6. In the **Top** field, position the cursor on the **Clear** option, press **F10** and select the **Cut** option.

7. Use the **Test** hot key to display the Fax Memo screen.

8. Send the fax to yourself.

    The system returns you to the Make Append Document screen.

9. Compare the two faxes you sent and decide which option produces the better output.

    Note: It may also be necessary for you to increase or decrease the **.50 inches** option. Repeat this test procedure, as needed, using different parameters until you produce the desired output.

    Use the selected parameters when creating append documents from faxes received from this fax machine.

See Also:

Creating Append Document Images

Append Document Overview

Creating Append Document Images

The first step in creating an append document is faxing an image of the document into the system. After you create append document images, you can assign them to append documents.

▶**To create an append document image:**

1. Fax a copy of the document to the VSI-FAX Gold modem number using the same fax machine that was used for the test. Set the resolution to **fine**.

   The system sends the image to the Incoming Fax Status Queue and assigns **in** as the image type. If you fax a multi-page document, it becomes one image.

2. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

3. Select the fax image and use the **Make Doc** hot key to display the Make Append Document screen.

   The system populates the **Top** field with default entries of **.50** inches and **Clear**.

4. In the **Top** field, change the parameters, if needed, to those you determined in the test procedure for making documents from images faxed in using this machine.

5. In the **File Name** field, enter a name for the document image. The name can be up to 30 alphanumeric characters, including spaces.

   Note: This file name is *not* the name of an append document. It is the name of an append document *image* that you can then assign to an append document.

6. Press **Esc** to save the information.

   The system changes the file type to **doc**. The image is now available to be assigned to an append document.

See Also:

Determining Append Document Image Parameters

Creating Append Documents

Append Document Overview

Creating Append Documents

After creating append document images for the fax system, you can create append documents, which can be attached to outgoing faxes. Assign at least one append document image to an append document.

▶**To create an append document:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

2. Use the **Manage Appends Doc** hot key to display the Append Docs screen.

3. Select **New** and press **Enter**.

4. At the prompt, enter a document name. The name can be up to 30 characters, including spaces.

    Note: The name you assign is the name that displays on the Append Documents list when you use the **Append Documents** hot key on the Fax Memo screen.

    The Documents for [document name] screen displays.

5. For each document image to assign to the append document, do the following:

    • Position the cursor on a blank line.

    • Press **F10** and select the image to assign to the append document name.

    • Press **Enter**.

    Note: Assign the images in the order in which they should display when you fax this append document.

6. When finished, press **Esc** twice to save the append document and return to the Incoming Fax Status Queue screen.

See Also:

Editing Append Documents

Deleting Append Documents

Appending Documents to Faxes

Editing Append Documents

Use the Incoming Fax Status Queue to edit append documents. You can add or delete the document images assigned to an append document.

▶**To edit an append document:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

2. Use the **Manage Appends Doc** hot key to display the Append Docs screen.

3. Position the cursor on a document name and press **Enter** to display the Documents for [document name] screen with the assigned document images.

4. To delete a document image assigned to an append document, position the cursor on the image name and press **Alt-Delete**.

5. To add a document image to an append document, position the cursor where the image should display in the list of images and use **Alt-Insert** to insert a blank line. On the blank line, press **F10**, select a document image, and press **Enter**.

6. Press **Esc** twice to save the updated append document and return to the Incoming Fax Status Queue screen.

See Also:

Creating Append Documents

Deleting Append Documents

Deleting Append Documents

Once you no longer need an append document, delete if from the Incoming Fax Status Queue.

▶**To delete an append document:**

1. From the **System > Printers** menu, select **Incoming Fax Status Queue** to display the Incoming Fax Status Queue screen.

2. Use the **Manage Appends Doc** hot key to display the Append Docs screen.

3. Position the cursor on the document name to delete and press **Alt-Delete**.

4. At the **Delete Document (Y/N)** prompt, enter **Y**.

    The system removes the document from the list.

5. Press **Esc** twice to exit the Incoming Fax Status Queue.

See Also:

Editing Append Documents

Creating Append Documents

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