

Check Factory Trans-Mit

USER GUIDE

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Trans-Micro, Inc.

Fairfield, FL

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Hardware Requirements

- ✓ 100 MHz or above Pentium processor.
- ✓ 32 megs RAM.
- ✓ Windows 9x, ME, NT, 2000, XP on workstation running Trans-Mit.
- ✓ Faxing: One or more Class 1, 2, or 2.0 Fax modem(s) connected to workstation COM ports.
- ✓ E-mail: MAPI compliant E-mail program.

About Trans-Mit

Trans-Mit enables Check Factory users to E-mail or Fax individual pages of a print job to separate locations based on the E-mail address or fax phone number embedded in each document page. Each page or group of pages for a particular phone number will be sent together with a cover page to the fax number provided. Each page or group of pages for a particular E-mail address will be bundled in to a PDF file and sent together with a cover message to the E-mail address provided.

An example of a six page purchase order print job:

Page	E-mail Address	Fax Number	Contact Name
1		555-555-5555	Jane Smith
2		555-555-5555	Jane Smith
3		555-555-5555	Jane Smith
4			George Wilson
5	mary@hope.com		Mary Jones
6	mary@hope.com		Mary Jones

Pages 1,2,3 will be faxed together to 555-555-5555 under one cover page to Jane Smith

Page 4 will be sent to the printer because it has no E-mail address or fax number.

Pages 5 and 6 will be e-mailed together in one PDF file to Mary Jones. Mary can then view or print the form on her printer.

- ✓ Trans-Mit will E-mail using any MAPI compliant E-mail program such as Microsoft Internet Explorer v5 or Netscape Navigator v 4.7 or above. The E-mail client must be installed correctly on the workstation.
- ✓ Each fax job can be scheduled to fax at a future time and/or date in order to save telephone rates.

- ✓ Trans-Mit maintains three fax logs to trace the success or failure of the individual fax jobs. The logs are: Sent Log, Out Box, Failed Log.
- ✓ Individual faxes may be resent as many times as necessary or deleted if the send was successful.
- ✓ Trans-Mit is designed to be operated on a workstation(s) connected to its own modem or modems. Trans-Mit can handle faxing via multiple modems to increase throughput. Trans-Mit does not operate with other fax server software.
- ✓ Each workstation maintains its own fax log files.
- ✓ Trans-Mit does not receive faxes.

Where does Trans-Mit get the fax number and E-mail address?

The Contact Name, Fax Number, and E-mail Address are passed to Check Factory as regular text inside the print job.

An example of what Check Factory would look for in a print file:

```
| |FAX1=555-456-9000 | |FAX2=555-566-8000 | |  
| |EMAIL=maryj@abccconst.com | |  
| |FAXTONAME=Mary Jones | |FAXTOCOMPANY=ABC  
Construction | |
```

We call the above code, “Trigger Codes”. They are created using your accounting software’s report writer and distributed to you as modified reports. Check Factory and Trans-Mit do not directly read your accounting software data files. They receive all information via the print job.

Check Factory reads this information, creates a record in the xxxx.FAX file for each page and then writes it to the Spool Folder. Trans-Mit then generates TIF image files for each page of the print job and relates the pages to the phone and address records of the xxxx.FAX file.

FAX1 is the primary Fax number and FAX2 is the secondary number. If both numbers exist then FAX2 will be used for faxing. If a valid E-mail address exists along with fax numbers, the pages will be e-mailed unless overridden by the operator.

Installing Trans-Mit

Check Factory v 2.x must already be installed on your system below your accounting software root directory. The serial number of the Trans-Mit system must match the existing Check Factory installation or Trans-Mit will install in demo mode.

- Run the Trans-Mit SETUP.EXE on the installation CD ROM. When prompted to select a directory to install to, choose your accounting software root directory.

Example: F:\MYACCTG

- If you are installing a registered version of Trans-Mit you will be prompted to insert your Trans-Mit registration floppy disk at the end of the installation process..

Install a Trans-Mit Printer

A special printer must be installed for Trans-Mit even if you already have a Check Factory printer installed. Trans-Mit MUST use a HP Laserjet III printer driver.

- Click the Start button on your task bar.
- Select Settings, Printers.
- Double click on Add Printer.
- Click Next
- Click on Local Printer.
- Click Next.
- Select HP from the Manufacturers list.
- Select HP Laserjet III from the printers list.
- Click Next.
- If asked, Keep the existing driver.
- Click Next.
- From the Available Ports list select C:\LFECF000 (Unknown Local Port)
- Click Next.
- Type in Trans-Mit for the printer name.
- You DO NOT want this printer to be the Default.
- Click Next.

- You DO NOT want to print a test page.
- Click Finish

Running Trans-Mit

- ✓ In Check Factory the Trans-Mit program is accessed from the Check Factory menu, Trans-Mit, Schedule / Send Faxes / E-mail.
- ✓ From the Windows Desktop, Start, Programs, Trans-Mit.

Trans-Mit Main Window



Edit Menu

Preferences, Workstation

User

Station Preferences

User Spool Path

Name	Albert Senowskis
Company	TMI
Voice Number	555 555 5555
Fax Number	555 555 5555

OK

Please enter your Name, Company Name, Voice Number and Fax Number. This information will be used in your fax cover pages and in the message body of your e-mail's.

Spool Path

Station Preferences

User Spool Path

Please choose a LOCAL fixed disk drive.

C:\TMSPPOOL Use Default

OK

The “Spool Path” designates where the Check Factory will generate the files necessary for the operation of Trans-Mit. This folder should be on a LOCAL drive visible only to this workstation. DO NOT attempt to place it on a network drive where other Trans-Mit users could possibly access it.

Preferences, Fax

Dialing

The screenshot shows a window titled "Fax Preferences" with a dark blue header. Below the header are two tabs: "Dialing" (selected) and "Modems". The "Dialing" tab contains a list of settings in a table-like format:

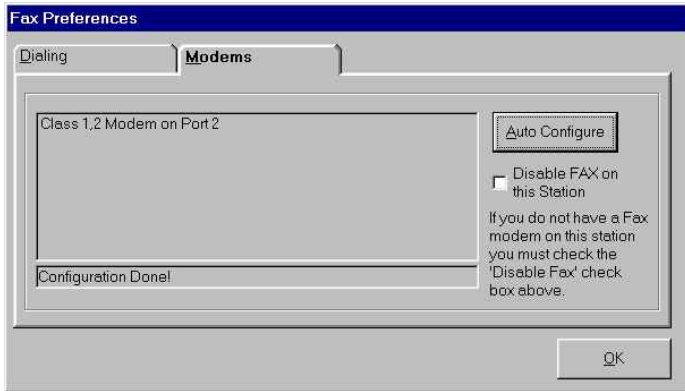
Local Area Code:	352	
# Fax Retries:	3	
Retry Interval:	60	Seconds
Local Dial Prefix:		
Long Distance Dial Prefix:	1	

An "OK" button is located at the bottom right of the dialog box.

1. Enter your local 3 digit local area code.
2. Enter the number of retries. We recommend at least 2.
3. Enter the retry interval. We recommend 5 minutes or 300 seconds.
4. Enter any numbers required to access an outside line for Local calls.
5. Enter any numbers required to access an outside line for Long Distance calls.

Note: Entering a comma (,) will cause a one half second pause that may be required after dialing the outside line access code.

Modems

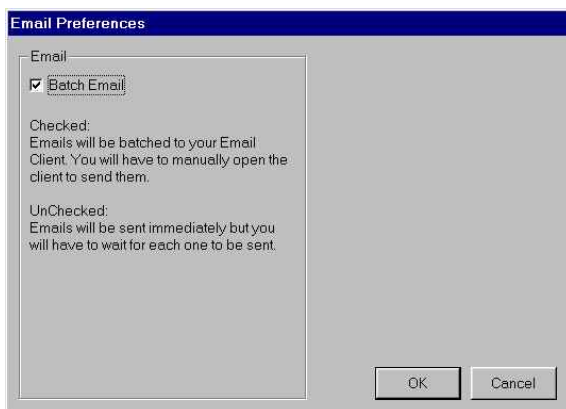


If you are using the fax capabilities of Trans-Mit you must have at least one fax modem listed on the Modems page. Press the Auto Configure button to search for and configure modems on this station. Please wait for the operation to complete before exiting the window.

Please perform the Fax Device "Auto Configure" anytime the modem configuration of your workstation changes or if you are experiencing difficulties in faxing.

If you will not be faxing from this station please check the "Disable Fax" check box.

E-mail



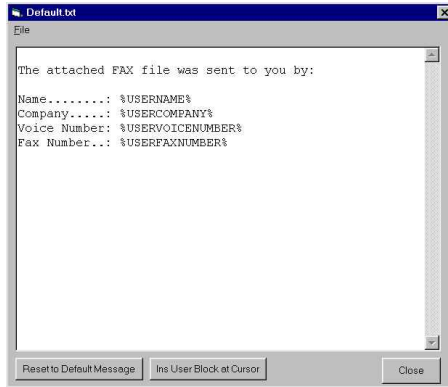
Select Batch mode if you have large jobs containing many e-mailed forms. Trans-Mit will generate all the e-mail's before releasing the job to your E-mail client. In this mode you may

have to open your E-mail client and manually start the E-mail process.

If Batch mode is not selected Trans-Mit will create an E-mail and you will have to wait for your E-mail client to send the mail before it sends the next one. If you have a slow Internet connection you may want to enable batch mode.

Maintain Messages

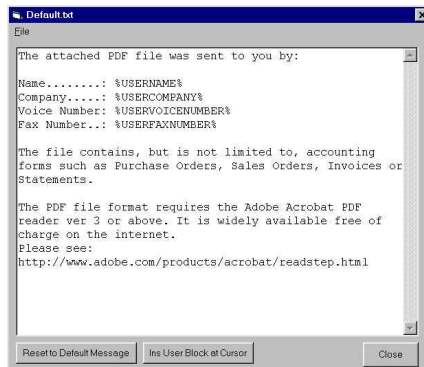
Fax Message



This is the message that will appear on the fax cover page. You may create an unlimited number of messages. Prior to sending your faxes you will be presented with the Job Control window. Here you will be able to choose the message that will be sent with the fax.

Use the File menu at the top of the Message Edit window to Open, Save, or Save As or create New messages.

E-mail Message



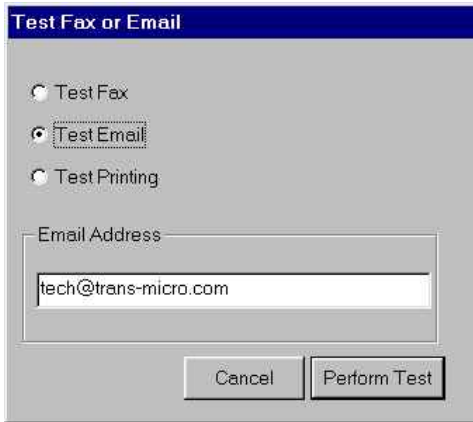
This is the message that will appear in the E-mail message. You may create an unlimited number of messages. Prior to sending your E-mail you will be presented with the Job Control window. Here you will be able to choose the message that will be sent with the E-mail.

Use the File menu at the top of the Message Edit window to Open, Save, or Save As or create New messages.

Test Menu

E-mail Test

Select the Fax Test option button to test the E-mail capabilities of Trans-Mit. Enter a valid E-mail address.



The screenshot shows a dialog box titled "Test Fax or Email". It contains three radio button options: "Test Fax", "Test Email" (which is selected), and "Test Printing". Below these options is a text input field labeled "Email Address" containing the text "tech@trans-micro.com". At the bottom of the dialog are two buttons: "Cancel" and "Perform Test".

Fax Test

Select the Fax Test option button to test the fax capabilities of Trans-Mit. Faxing must be enabled and at least on modem must be configured in Preferences, Fax Preferences. Enter a valid fax number that has a fax machine connected and ready.



The screenshot shows the same "Test Fax or Email" dialog box, but now "Test Fax" is selected. The "Email Address" field is replaced by two text input fields under the label "Fax Number": "Area Code" with the value "352" and "Fax Number" with the value "591-1096". The "Cancel" and "Perform Test" buttons remain at the bottom.

Press the Perform Test button. The testing procedure closely follows the actual procedure for sending faxes and e-mail's via

Trans-Mit. You will be presented with the “Destination Numbers and Address” window which will validate the fax numbers and E-mail addresses. You will have the opportunity to make changes to the numbers and addresses. You may also choose to only Print certain pages or not send them at all.

The Tools menu at the top of the window allows you to quickly change specific columns for all pages in the job.

Destination Numbers and Address

Destination	Fax Number	To	Company	Email Address
Email	(352) 591-1096	Sample Person	Sample Company	tech@trans-micro.com

Invalid Fax Numbers and/or Email Addresses are shown in red.

Once you have edited the numbers and addresses press OK to proceed to the Job Control window.

Job Control

Job Information

Email Message

Fax Message

Schedule Fax

User Information

Job Description: Sample Trans-Mit Job

Date Created: 01-01-2000

Time Created: 12:00 am

Email / Fax Subject: Sample Trans-Mit Job

Job Information

The screenshot shows the 'Job Control' dialog box with the 'Job Information' tab selected. The left sidebar contains buttons for 'Email Message', 'Fax Message', 'Schedule Fax', and 'User Information'. The main area contains a table with the following data:

Job Description	Sample Trans-Mit Job
Date Created	01-01-2000
Time Created	12:00 am

Below the table, there is a label 'Email / Fax Subject' followed by a text box containing 'Sample Trans-Mit Job'. At the bottom right, there are 'Cancel' and 'OK' buttons.

This tab tells you the name of the print job as it was defined when printed from Check Factory.

E-mail Message

The screenshot shows the 'Job Control' dialog box with the 'Email Message' tab selected. The left sidebar contains buttons for 'Job Information', 'Email Message', 'Fax Message', 'Schedule Fax', and 'User Information'. The main area is titled 'Email Message Body' and contains a dropdown menu set to 'Default.txt' and an 'Edit' button. At the bottom right, there are 'Cancel' and 'OK' buttons.

This tab allows you to change or edit the message body of the e-mail's that you are about to send.

Fax Message

The screenshot shows the 'Job Control' dialog box with the 'Fax Message' tab selected. The left sidebar contains buttons for 'Job Information', 'Email Message', 'Fax Message', 'Schedule Fax', and 'User Information'. The main area is titled 'Fax Message Body' and contains a dropdown menu set to 'Default.txt' and an 'Edit' button. At the bottom right, there are 'Cancel' and 'OK' buttons.

This tab allows you to change or edit the message body of the faxes that you are about to send.

Schedule Fax

Job Control

Job Information

Email Message

Fax Message

Schedule Fax

User Information

Schedule

Send NOW

Schedule Time and Date

One Hour from Now

5 PM Today

7 PM Today

Midnight Tonight

Now Plus 1 minute

Use Cover Page

Time to Fax

12:00:00 AM

November 2001

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Cancel OK

This tab allows you to schedule the send time of any faxes that you are about to send. You may send them immediately or any time in the future. The Faxman globe icon must be visible on your work station for faxing to occur. Starting the Trans-Mit program with faxing enabled will run the Faxman fax server. Closing Trans-Mit will not shut down the Faxman server and faxes will continue to be sent. Un-sent faxes previously scheduled will be sent as soon as the Faxman server starts.

User Information

Job Control

Job Information

Email Message

Fax Message

Schedule Fax

User Information

User Information

From Person Albert Snow

From CompanyName TMI

From Voice Number (655) 555-5555

From Fax Number (655) 555-5555

Cancel OK

This tab allows you to make last minute changes to the User information prior to faxing or e-mailing.

Press the OK button to Trans-Mit your faxes and e-mail's.

Faxing a print job from your accounting software

We assume that you are already familiar with printing forms from your accounting software via Check Factory. If you are not familiar with this procedure please consult the Check Factory manuals before proceeding.

Important Printer Information!

Trans-Mit WILL NOT WORK with the Check Factory printer that uses the HP Laserjet IV driver. Therefore YOU MUST add a new printer called Trans-Mit that uses a HP Laserjet III driver

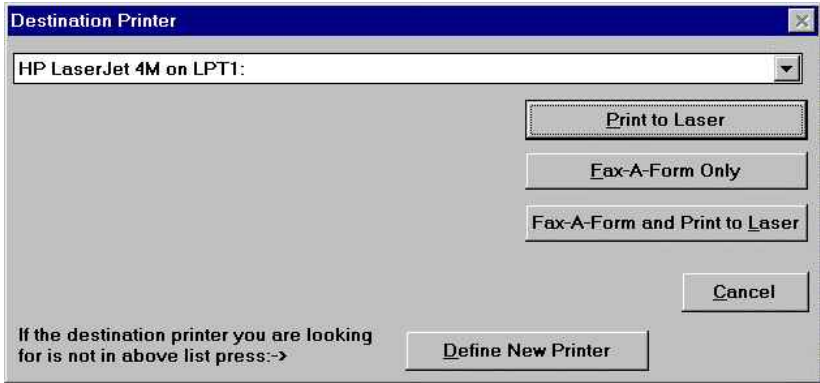
You MUST print to the **Trans-Mit printer** NOT the Check Factory printer when selecting a printer in your accounting software.

Verify Fax Phone Numbers

Before proceeding you must first verify that you have the Fax Number and Contact Name in each record of your vendor and customer files. Trans-Mit needs this information to generate a fax job during printing. If Trans-Mit encounters forms that do not have a fax number you will not be allowed to proceed until a number is entered. You may also choose to print it or to not send it at all. This will greatly slow down the process and some recipients may not receive faxes due to typing errors. Print out a vendor and customer list and verify that each record has a fax number.

Each fax number MUST include the three (3) digit Area Code followed by seven (7) more numbers. Currently foreign phone numbers not using the ten digit format are not supported.

Next print a batch of forms to the Trans-Mit printer. When Check Factory intercepts the print job you will be prompted with the following window:



You have three choices at this time:

Print to Laser.

This will send the print job to the laser printer only. No fax job will be created.

Trans-Mit

This will generate a Trans-Mit job in the spool folder. Later you will run Trans-Mit and actually send the job.

Trans-Mit and Print to Laser.

This will print the forms to the printer AND generate a Trans-Mit job.

If you select number 2 or 3 you will be presented with this window:



All the fields in this window are editable. Generally you will only enter a Job Description. This will help you remember this print job when you actually send it in Trans-Mit.

Check Factory will go through its printing operation. If you selected Trans-Mit, it will have spooled the print job to the \TMSPOOL folder on your local drive. The job is now ready to be processed by Trans-Mit.

Sending Trans-Mit Jobs

Select Trans-Mit, Schedule / Send Faxes from the Check Factory menu. The Trans-Mit main window will appear.

Click on the "Trans-Mit a Print Job" button. The Select Trans-Mit Job window will appear.



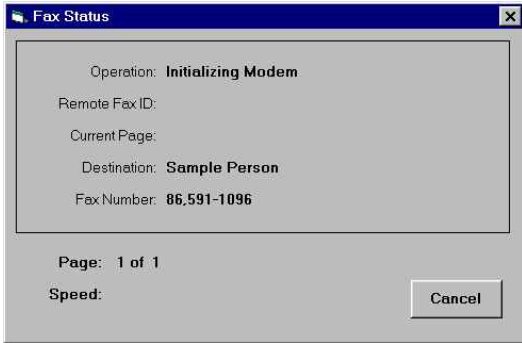
Choose the job to Trans-Mit from the list. You will now follow the same steps as described in the testing section above. Please refer to the testing section above.

FAXMAN fax server program.

If you have faxing enabled the FAXMAN globe icon will appear in the program bar at the bottom of your screen. FAXMAN is the Trans-Mit fax server that actually does the faxing. The FAXMAN icon will remain even if you exit the Trans-Mit program. If you have scheduled faxes at a later time and or date, the FAXMAN server program must be running when those faxes are scheduled to fax.

Fax Status Window

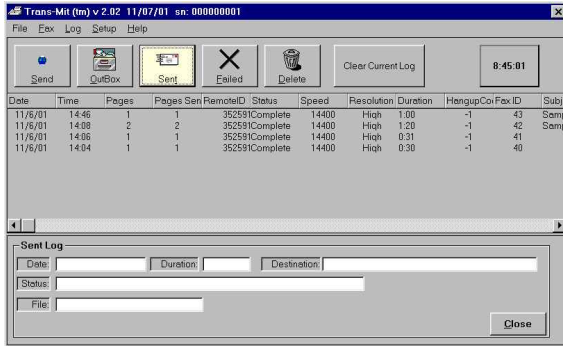
If the Trans-Mit program is running while Faxman is sending faxes you will see the Fax Status window.



Trans-Mit Fax Logs

The Trans-Mit logs give you valuable information about the status of all pending, completed, and failed fax jobs. From the main Trans-Mit window click on the View / Edit Fax Log button. It will bring up the Fax Log window.

Clicking on the Out Box, Sent, and Failed buttons will display the respective logs.



Sent Log

Date	Time	Pages	Pages Seri	RemoteID	Status	Speed	Resolution	Duration	HangupCo	Fax
01/19/1998	17:26	4	4	1 352 591 1	Complete	14400	High	2:32	-1	
01/19/1998	15:31	4	4	1 352 591 1	Complete	9600	High	3:33	-1	
01/19/1998	15:32	4	4	1 352 591 1	Complete	9600	High	3:32	-1	
01/19/1998	15:12	4	4	1 352 591 1	Complete	12000	High	3:40	-1	

The Sent Log displays all faxes that have completed successfully. When you are satisfied with the contents of this log please delete the entries.

Out Box Log

The Out Box log displays the all faxes that are currently scheduled. You should not delete items from this log unless you never want them faxed.

Failed Log

The Failed Log displays all faxes that failed the faxing process for whatever reason. You may re-fax items in this log by dragging and then dropping the item on the Send button.

Once the item is dropped on the Send button the following window will be displayed.

Displaying the Contents of a Fax

Double click on a line of any fax log will bring up the Faxman Viewer. It will display the fax images.

Re-Sending A Fax

To re-send a failed fax simply drag the line from the log to the Send button. You have the option to change or correct the fax number prior to Re-Sending the fax.

Re-Send A Fax

To: Sample Person

Number: 86.591-1096

Company: Sample Company

Subject: Sample Trans-Mit Job

Files To Fax

C:\TMSPOOL\SAMP0001.FMF

Comments

The attached FAX file was sent to you by:

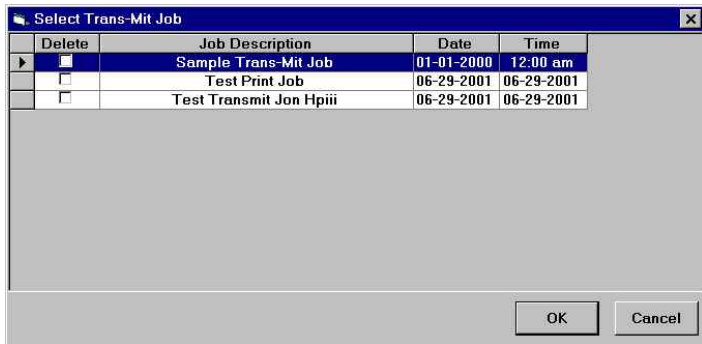
Name.....: Albert Sanowskis
Company.....: Trans-Micro, Inc.
Voice Number: (352) 591-1030
Fax Number...: (352) 591-1096

Send Cover Page

Cancel Send

Job Maintenance

File Menu, Job Maintenance



Once you are certain that all faxes and e-mail's have been sent from a particular Trans-Mit job you should delete it from the spool folder. Click on File, Job Maintenance. Choose the job(s) to delete by checking the delete check box(s). Press OK to delete the jobs.

Appendix A

How does Trans-Mit work?

Your accounting application prints its print job to a HP Laserjet III print driver connected to the file: C:\LFECF000. Check Factory intercepts the print job by polling for the file C:\LFECF000. Each page of the print job is inspected looking for our “Trigger Codes”. The trigger codes are plain text commands embedded in the print job by the accounting software. The codes look something like:

```
|| FormID=INVOICE || DBLINK=Your Company Name ||  
|| FNUM=555-234-5678 || FNAM= Joe Gomez || FCMP =  
Gomez, Inc. ||  
|| EMail = joe@gomezinc ||
```

You will notice that the code structure is delimiter (two vertical bars), command, equal sign (=), argument, and finally another delimiter or || Command = Argument ||

Check Factory locates the codes in each page of the print job and performs the necessary action. The codes and delimiters are stripped from the print job by check factory so that you should never see them print on the page.

FormID and DBLink select the form overlay to be applied to the print data and DBLink selects the correct company from the Check Factory database. FNUM, FNAM, and FCMP are the fax number, fax contact name and company to fax to. Email is of course, the email address of the recipient.

Check Factory spools the entire file to the TMSPOOL folder. Each file is numbered with a description so that the Trans-Mit operator can later process the file in to faxes and emails.

Appendix B

Where does Transmit get Fax numbers and EMail addresses from?

Check Factory creates a parallel file to the print file that contains all the fax numbers and email addresses for each page of the print job. This file is processed when the operator chooses to Trans-Mit the job.

Appendix C

How can I interface Trans-Mit to my own program?

The essential part of your interface is to pass the fax number and email addresses within the print job so that Check Factory and Trans-Mit can see them. We will do an example using Crystal Reports.

Open a report in Crystal Reports (any version). Add a new formula field to the report and place it somewhere on the report where it will print on each page of the report. Call our new field “TransMit”

Edit the formula field and create a concatenated string using text and fields from your database. Database fields in the example will have curly brackets around the field name and text will be surrounded by quotes. Here goes...

```
“ | FormID = INVOICE ” +  
“ | DBLINK = ” + {CompanyName} +  
“ | FCMP = ” + {CustomerCompanyName} +  
“ | FNAM = ” + {CustomerContactName} +  
“ | FNUM = ” + {CustomerFaxNumber} +  
“ | EMAIL = + {CustEmailAddr} +  
“ | ”
```

Save the formula and on the report page make sure that the field size is large enough to display the field. Even though you will never see it printed it must actually print in its entirety on the page in cyber space! In fact do a test print directly to the printer to make sure.

On the printed page your field would look something like this:

```
|| FormID = INVOICE || DBLINK = XYZ Company || FCMP =  
Gomez, Inc. ||  
|| FNAM = Joe Gomez || FNUM = 555-555-3456 || EMAIL =  
joe@gomezinc ||
```

One final thing must be done to our new formula field. THIS IS VERY IMPORTANT! First make sure that the printer displayed in the Crystal Reports File menu, Printer Setup is a HP Laserjet III or HP Laserjet 4 printer. If you do not have this printer installed do it now. You will need it later anyway. See “Install a Trans-Mit Printer” (above) Change the font on the new field that we created to LINEPRINTER, 8 points. If you do

not use a printer resident font Check Factory and Trans-Mit will not be able to read the trigger codes.

Testing:

Print your report directly to the printer to verify that all of the trigger codes are printing correctly and that they contain valid information and are surrounded by the || delimiter.

Next run the Check Factory program. Make sure you have at least one company installed. Minimize Check Factory. Print your Crystal report that we just added the trigger codes to. Print the report to the Trans-Mit HP Laserjet III printer on C:\LFECF000.

Check Factory will pop up and process the job. If necessary, select your company and form (select Blank if you do not have an overlay). When the Print to Laser window pops up, select the Trans-Mit button. Enter a description for the job when prompted. The job will now be spooled. Either now or sometime later, bring up the Check Factory program, click Trans-Mit on the menu and follow the prompts. Each page of your print job will be faxed, emailed or printed, possibly to hundreds of different locations with just a few keystrokes!