

QUICK SEND

Starting with version 11.0, you may have seen a link on your order overview for “Quick Send” and wondered what that was all about.

This is a new function that let's you print, FAX, or e-mail the various documents related to an order at one time without having to go into multiple dialogs.

For example, if you normally print a file copy, FAX the purchase order to the vendor, and e-mail the customer an acknowledgment, you used to have to go to three separate dialogs to request the various methods.

Now you can click on the “Quick send” link and do all three at once. You can still request individual documents as you did before. This function just lets you do the standard functions quickly.

You can access the Quick send function directly from the order overview screen or from the menu.

Set up

Before you can use this feature, you will need to predefine all of the actions you normally take for each type of order. For example, suppose you normally print a file copy, FAX the purchase order, and e-mail the acknowledgment to the customer for each drop ship order. To set up the Quick Send for each type of order, go to

Reference Information
Quick Send

A **specification number** is assigned to each combination of type of order, document, and method. These are normally just assigned in numerical order. If you are entering a specification for the first time, click on the **New** icon to get the next available number. If you are changing an existing specification, you can click on the look up icon to select it.

Then, first select the type of order from the drop down box.

Once you select the type of order, the list of documents available for that type of order can be selected from another drop down box.

If the document is one like the purchase order/acknowledge that has multiple copies, indicate what copy you are defining.

Finally, pick the format you want to use—PDF, FAX, or e-mail. For the FAX or e-mail options, there are additional fields you can use to define the default information to be used for things like the message in the body of the e-mail. You will be able to change this when you actually send the order but if you frequently use the same comment, defining it here will save you some typing later.

If you use OrderTrax², you may also set this up as one of your Quick Send options.

Below are sample screens showing the dialogs for the various types of formats.

To be displayed as a PDF

Set up Quick Send format



Specification number: **New**

Type order:

Document:

Format: Display/Print as PDF Print w/o preview FAX E-mail

Copy number:

Save

Delete

Reset

Exit

To be sent as a FAX

Set up Quick Send format

   

Specification number:  **New**

Type order:

Document:

Format: Display/Print as PDF Print w/o preview FAX E-mail

Copy number:

FAX number: () - Ext. LD 
Leave blank to use FAX number from order or to prompt when ready to send

Time to send FAX: : AM PM 

Cover sheet?

Default message for cover sheet OR in body of e-mail:  

To be sent as an e-mail

Set up Quick Send format

   

Specification number:  **New**

Type order:

Document:

Format: Display/Print as PDF Print w/o preview FAX E-mail

E-mail address:

Leave blank to use E-mail address from order or to prompt when ready to send

Default message for cover sheet OR in body of e-mail:

  

To be sent through OrderTrax²

Set up Quick Send format

   

Specification number:  **New**

Type order:

Document:

Copy number:

Using Quick Send to generate & send your documents

When you request the Quick Send function for an order, if there are document-related actions defined for the related type of order, you will see a dialog screen.

Quick Send

Uncheck all document options
Check all document options

Order Number: 710010

Send?	Format	Document
<input checked="" type="checkbox"/>	Print	Order to Vendor/Acknowledgment File copy
<input type="checkbox"/>	FAX	Order to Vendor/Acknowledgment Purchase order Maple Ridge Farms Inc. To: 6934600 at : AM PM <input checked="" type="checkbox"/> Cover sheet? Text on cover sheet: See my order attached. Please confirm receipt of this document.
<input checked="" type="checkbox"/>	Print	Packing slip
<input checked="" type="checkbox"/>	E-mail	Master Order Acknowledgment to Sam Whitman To: sam@whitman.com Text in body of e-mail: Please review the attached acknowledgment of your order and let us know IMMEDIATELY at 292-7422 if there are any problems or changes that need to made. Thank you for your order!
<input checked="" type="checkbox"/>	OrderTrax	Send purchase order to Maple Ridge Farms Inc. through OrderTrax

Submit Reset Exit

If you have multiple ways listed to send the same document, be sure to uncheck the ones you don't want to use.

For each document listed, you will have a **check box** that will initially be checked. If you DON'T want to produce that document on this particular order at this time, uncheck the box. You can still generate all the other documents listed.

At the top of the screen there is a link where you can uncheck or check all the boxes at one time.

For documents that are to be FAXed, a default **FAX number** will be listed. This would be the vendor's FAX number if you are FAXing a purchase order or the FAX number of the customer contact listed on the order if you are FAXing an acknowledgment. If that number is missing or incorrect, you can change it. You will also need to specify at **what time** you want the document to be FAXed and whether you want a **cover sheet**. If you want a cover sheet, you can enter a short message (20 lines, 60 characters each) to be used. This will default to the message you set up when you originally added this document to the Quick Send list.

For documents that are to be e-mailed, the default e-mail address will be listed. You can correct it if it is missing or incorrect. You may also enter a short message to be included in the body of the e-mail along with your normal signature information which will be included automatically. The message will default to what you entered when you added the document to the Quick Send list.

Once you click the Submit button, all the documents will be generated. Those that are to be FAXed will be transmitted at the appropriate time. E-mailed documents will be sent right away. Those that are to be printed will be generated in a PDF. If you are printing multiple documents, these will all appear in a single PDF, one right after the other.