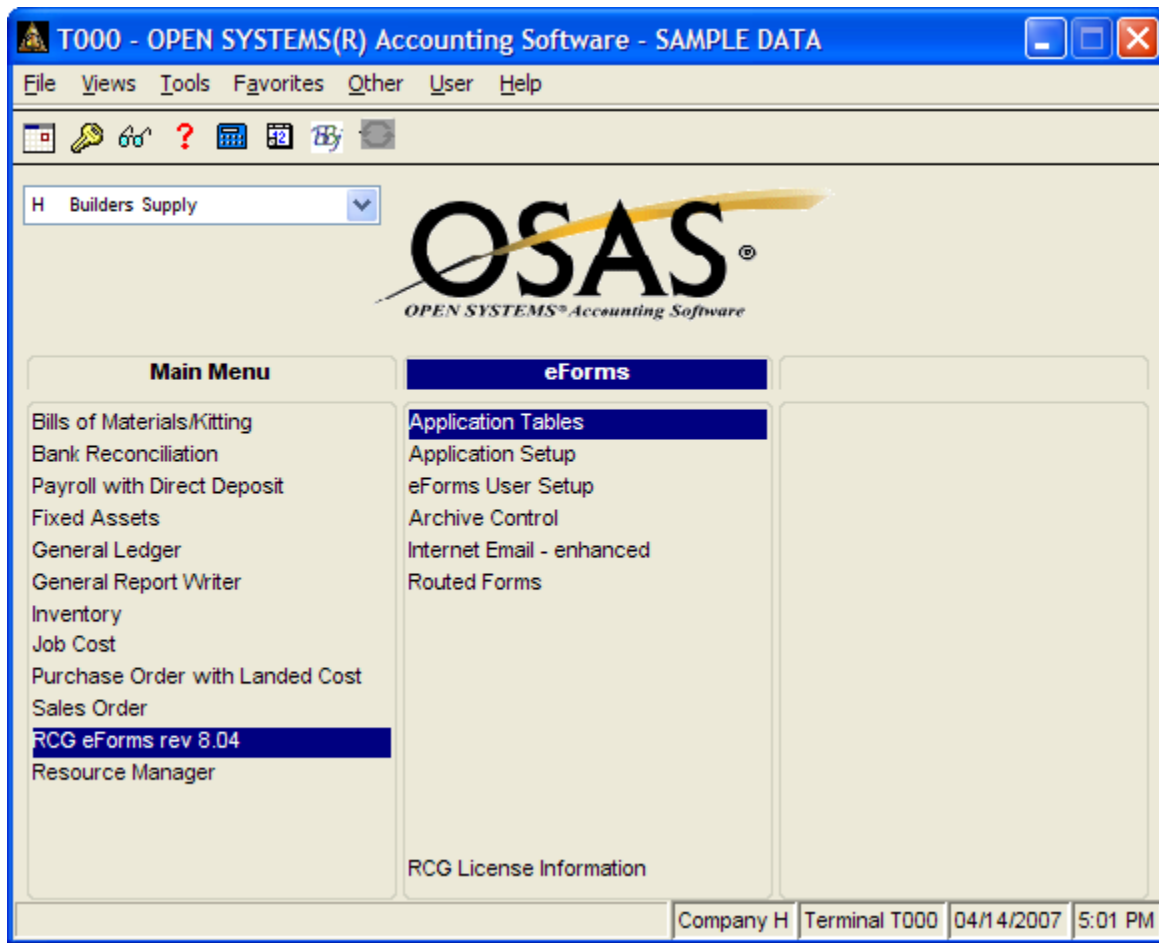Response Computer Group, Inc.
1571 Bay Road
Milford, DE 19963
PHONE   (800) 957-4724
FAX   (302) 335-4543

RCG eForms for OSAS 7.5
User Documentation

Application Tables

Many eForms options are setup and tuned using tables. For a detailed explanation of each of the eForms tables, as well as other crucial information regarding eForms installation, refer to Appendix A.

Application Setup

Most of the eForms options are now set using the Application Setup screen and no longer require application tables.

CC outgoing emails back to sender?
By default the internet email module saves a copy of each transmission in the "Sent Items" folder for the sending user within OSAS under the RCG Utilities menu. These can be edited, resent, deleted, or whatever from there. If this setting is checked/set to YES, the email program will send an internet email carbon copy of each message to the sender's return address. This allows you to keep a copy of those emails send in one of your Microsoft Outlook folders, for example, along with your other internet email.

Hold emails for batch sending?
To cause emails to go out in "Batch" mode, enter YES here.Then emails will only be sent when selecting "Resend Outbox Emails" from the RCG Utilities/Internet Email menu.

Include recipient list in multi-recipient emails?
All eForms emails are sent individually without the option for Cc: or Bcc:. Each email gives the option to list all the recipients in the body or not. Choose the default behavior by entering YES or NO here.

Log SMTP activity to file for troubleshooting?
Set this to YES if you would like to record the SMTP conversation between the application and the SMTP server for troubleshooting purposes. The conversation will be logged in the file ../rcmail/SMTPLOG.

Default email attachment type:
When emailing a report or form from OSAS, there are three choices as to the document's format. "T" sends a plain text attachment. "H" will convert the report or plain-paper form to simple HTML and place it in the body of the email message. "P" works with UnForm or open-source utilities to create a pdf file attachment.

PDF Generation:
PDF documents can be created by eForms for archiving and/or email if the necessary third-party utilities are available. If UNFORM is available, this should be used, since it will enhance the documents in addition to converting them to pdf. Otherwise, the open-source utilities enscript and ghostscript can be used. In this case, select FREEWARE. If no pdf utilities are available, select NONE, and eForms will create plain text files.

Unform Command:
Executable command for unform client for pdf generation.

Unform Rules File:
Rules file to use with unform for pdf generation.

Other Unform options:
Optional command line options for Unform, like "-s" for substitution file.

Fax Method:
Metrofax.com is the preferred fax method for OSAS 7.5 eForms. Efax.com is another supported method. Other fax methods are listed that have been supported in the past. These may need some support from RCG to make them work with this version of eForms. Some application tables may be required. See the references to fax tables in appendix A.

Sender email for faxing:
If you want one email address to be used as the sender email address when sending faxes through an email-to-fax gateway (metrofax, efax), enter that email address here. If this is blank, the email/fax will be sent with the user's return email address. If you use that method, be sure that each user's email address is on file with your account at metrofax or efax, or the fax will not be forwarded to your recipient. Another option is to leave this entry blank and key multiple addresses into the "EFAXA" table. In the example below, eForms will check to see if the current user's return address is in the table. If so, it will be used, otherwise the first email address in the list will be used.

```
┌─────────────────────────────────────────────────────────────────────┐
│ 🔺 RCTB                                            [_] [□] [✕]        │
├─────────────────────────────────────────────────────────────────────┤
│ Commands  Edit  Modes  Other  Help                                   │
├─────────────────────────────────────────────────────────────────────┤
│  ⚒ ✕ ▤  ▣ ▦  ▥ ▦  ? ◆  🌐 🌐              [ OK ] [ Abandon ]       │
│  Table ID    EFAXA        🔍   Description   EMAIL ADDRESSES FOR EMAIL TO FAX │
│  Number of Cols      1         Column Length    50   Type   A  ▼     │
│  EMAIL ADDRESES FOR EFAX.COM OR METROFAX.COM                         │
│                                                                       │
│  -----------------------------------------------                     │
│  fax@yourmail.com                                                     │
│  mymail@yourmail.com                                                  │
│  ┌──────────────────────────────────────────────┐                   │
│  ├──────────────────────────────────────────────┤                   │
│  ├──────────────────────────────────────────────┤                   │
│  ├──────────────────────────────────────────────┤                   │
│  ├──────────────────────────────────────────────┤                   │
│  ├──────────────────────────────────────────────┤                   │
│  ├──────────────────────────────────────────────┤                   │
│  └──────────────────────────────────────────────┘                   │
│                                                                       │
│                        Company H  04/15/2007  Terminal T000  OVR     │
└─────────────────────────────────────────────────────────────────────┘
```

Fax phone number prefix:
For other fax methods such as VSIFAX, adds a prefix to outgoing fax number, such as "9,"

Archive Path:
When archiving files, if an override path is not indicated, eForms will attempt to create the archive file in a directory defined by this field. Nine variable values are allowed, as are described below. If the directories do not yet exist, eForms will attempt to create them on the fly.

Variables allowed: <Y>=year, <M>=month (e.g. 12_DECEMBER), <D>=day, <P>=program,<A>=application, <U>=user id, <YMD>=date (YYYYMMDD), <T>=title (aka menu description),<C>=company id. <M2> results in the month in the following format "month"+month number+"_"+short month name (e.g. "month12_dec).

Archive Error Path:
If an error occurs when attempting to archive to the override path or the path defined in the Archive Path, eForms will make another try, this time to the path defined here. If this fails as well, the file will not be archived.

Mailcall Path:
MailCall is included as part of OSAS in versions 6.5x and higher. If mailcall is installed in a non-standard location for some reason, you can enter that path here. Otherwise leave the default of "../progRM/". Make sure you also do the Resource Manager, Installation and Configuration, Email setup function, which defines the parameters for mailcall.

Ghostscript Path:
Directory for ghostscript for creating pdf's for windows, should be something like:
\progra~1\gs\gs8.14\bin\
For linux/unix leave blank if "gs" can be invoked from command prompt without prefix.
otherwise enter path with "/" slashes.

eForms User Setup

Use this screen to identify the OSAS users who will be sending internet email or faxes. Full user name and internet email address are tracked here by user id.

User ID:
In a Unix/Linux environment, the user id is the login id that you use to access the system. It is case-specific, so if you log in using lower-case letters, use them here as well.
In a Windows environment, the user id may not be known. You can change your OSAS windows icon to define the use id when you invoke OSAS. Right click on the OSAS icon, select "Properties" and add "-u" plus your login id (no spaces between). The next time you invoke OSAS, the login id will be known and should show up automatically in this field. If no login id is identified, eForms will track the user by terminal id. This is not recommended, however, and archiving functions will be automatically disabled. You can change the setup for someone else's login id simply by entering it at the prompt instead of your own, which comes up as the default.

User Name:
This is the user's name. This name will be used on fax cover pages to identify the sender.

Archive Control:
Four valid choices: Never, Always, Silent, and Prompt.

- ➢ Use **Never** for users whose applications generally don't need to be archived. Critical applications can be set to always be archived regardless of the user (see matrix below).
- ➢ Use **Always** to archive everything this user prints, regardless of the settings on the particular applications. Use **Always** as a way to quickly setup archive for a user, without having to setup individual applications. Also, **Always** can be used as a method to keep track of reports that a specific user generates.
- ➢ Use **Silent** for users that need archiving to happen without any alerts or prompting. This selection is provided with background functions in mind, such as "After Hours" or "Behind the Scenes". Set the users who will be running these functions to **Silent** so that the archiving will happen without prompts or reminders so that the background process is not interrupted.
- ➢ Use **Prompt** as a general rule for everyone else.

The Archive Control setting for each user selection works together with the Archive Control setting for the application to determine what to do about archiving for this particular user and application. The two settings work together according to the following matrix:

	User "Prompt"	User "Always"	User "Never"	User "Silent"
Application "Prompt"	Prompt user before archiving	Archive, alert the user afterward	Don't archive	Archive, no alerts/prompts
Application "Always"	Archive, alert the user afterward	Archive, alert the user afterward	Archive, alert the user after	Archive, no alerts/prompts
Application "Never" or not defined	Don't archive	Archive, alert the user afterward	Don't archive	Don't Archive

Internet Email: This is the internet email address which will be used as the return address when this user sends internet email. A valid email address is required for eForms internet email to work properly.

User Override Archive Path: Use this field to set up an override path for archiving that will be used for this user only. This allows a user to redirect the archiving of reports that they are printing without interrupting the archive flow for other users.

This path allows for variables which will be calculated at archive time so that intelligent subdirectory names can be created. Variables as defined here may be placed anywhere in the path, and will be replaced by their archive-time value.

Variables allowed: <Y>=year, <M>=month (e.g. 12_DECEMBER), <D>=day, <P>=program,<A>=application, <U>=user id, <YMD>=date (YYYYMMDD), <T>=title (aka menu description),<C>=company id.
In release 4.12 we introduced a new variable <M2> which will result in the month in the following format "month"+month number+"_"+short month name (e.g. "month12_dec).

Note: Prior to release 4.12 (12/06/2004), archive directories were forced to upper case. With release 4.12 we changed the logic to force both the directory names and the file prefix to be lower case, which is more manageable in unix/linux environments. If you originally installed revision 4.11 or prior and subsequently reinstall 4.12 or later, be aware of this change. In unix/linux environments, you will need to rename your existing (upper case) directories to lower case to prevent duplication

Archive Control

The Archive Control Screen can be used to enable the eForms automatic archive feature. eForms archive control settings are defined for each selection on the OSAS menus. By default, all menu selections are set to "Never" archive. To begin archiving for a certain menu selection, change its archive control settings. Use the inquiry function to select the application and menu where the function appears in OSAS. Once the menu appears, navigate using the up and down arrow keys to select the function to be archived. Whenever a valid eForms user prints a document to (P)rinter or p(R)eview or e(M)ail eForms will check the archive control settings for the application and the user to determine whether the report should be archived. Unless an override path is entered, the archive file will be saved in the "Archive Path" defined in Application Setup. See the notes regarding Application setup for details. Archived files will be plain text files by default. Unembellished PDF files may be generated using the free open-source programs "enscript" and "ghostscript" or Enhanced PDF files may be generated using UnForm. Refer to the Application Setup section for details.

Line	Description	Override Path?	File Prefix	Control
01	Print Invoices			Never
02	Open Order Report			Never
03	Blanket Order Report			Never
04	Sales Journal		SJOURN	Always
05	Miscellaneous Credits Journal			Never
06	Daily Sales Tax Report			Never
07	Cash Receipts Journal		CJRN	Always
08	Methods of Payment Journal			Never
09	Deposits Report			Never
10	Post Transactions		SOPOST	Always
11				
12				
13				
14				
15				

Application: SO   Menu: SO03   Title: Transaction Reports

Enter=edit   Override Path   Write

Company H   04/14/2007   Terminal T000   OVR

File Prefix:
This is a prefix for the archive document to make it easily identifiable. This prefix will be followed by a unique date/time stamp. For example if the prefix "EMFAX" is used for the Email/Fax Contacts list, the document produced would be called something like emfax2004_06_01_180953.txt.

Control:
The Archive Control field can be set to Never, Always, or Prompt. The Archive Control setting for each application works together with the Archive Control set on the current user to determine what to do about archiving for this particular user and application. The two settings work together according to the following matrix:

	User "Prompt"	User "Always"	User "Never"	User "Silent"
Application "Prompt"	Prompt user before archiving	Archive, alert the user afterward	Don't archive	Archive, no alerts/prompts
Application "Always"	Archive, alert the user afterward	Archive, alert the user afterward	Archive, alert the user after	Archive, no alerts/prompts
Application "Never" or not defined	Don't archive	Archive, alert the user afterward	Don't archive	Don't Archive

Override Path:
If a * character appears in the Override Path column, this indicates that there is an override path on file. This path will override the default archive path defined Application Setup. To change or remove the override path, point to the menu selection and hit O.

This path allows for variables which will be calculated at archive time so that intelligent subdirectory names can be created. Variables as defined here may be placed anywhere in the path, and will be replaced by their archive-time value.

Variables allowed: <Y>=year, <M>=month (e.g. 12_DECEMBER), <D>=day, <P>=program,<A>=application, <U>=user id, <YMD>=date (YYYYMMDD), <T>=title (aka menu description),<C>=company id.
In release 4.12 we introduced a new variable <M2> which will result in the month in the following format "month"+month number+"_"+short month name (e.g. "month12_dec).

Note: Prior to release 4.12 (12/06/2004), archive directories were forced to upper case. With release 4.12 we changed the logic to force both the directory names and the file prefix to be lower case, which is more manageable in unix/linux environments. If you originally installed revision 4.11 or prior and subsequently reinstall 4.12 or later, be aware of this change. In unix/linux environments, you will need to rename your existing (upper case) directories to lower case to prevent duplication.

Special Batch Archive: Normally, eForms will save each print job as one archive file. When you select the printer, everything that prints will be mirrored in the archive file. eForms also includes special batch archive capability for A/R Invoices and A/R Statements. Instead of archiving an entire invoice run to one file, eForms archives each individual invoice or statement separately in a subfolder named <customerID_customername>. An override path can be defined so that a customer's forms can be easily found in a folder called "invoices/customerID_customername". The individual filenames contain the invoice number or the statement date. To activate this feature, use the Invoices or Statements

programs found in the eForms Batch Forms menu. If Archive Control is activated for these menu options, the programs will automatically separate the archive by customer. This feature is also available for standard OSAS 7.5 A/R invoices, batch and online. We hope to add this feature to Standard A/R Statements in a future release.

Enhanced Internet Email

OSAS 7.5 includes the capability to email output directly from the Accounting Software. eForms adds some features to that base functionality, including:

- Email Groups, group-building wizard, blast emailing to groups.
- Email report attachments as PDF instead of text using UnForm or Freeware.
- Searchable Outbox; failed emails remain in outbox until success or deletion.
- Searchable Sent Items: can be re-sent to same or other recipients.
- Emails can be sent to any number of individuals or to defined groups.
- Attach any number of any type of document including html in body.
- Multiple Fax recipients can be added to email contacts and automatically email/faxed through metrofax.com or efax.com.

Find all the eForms enhancements related to internet email in this menu.
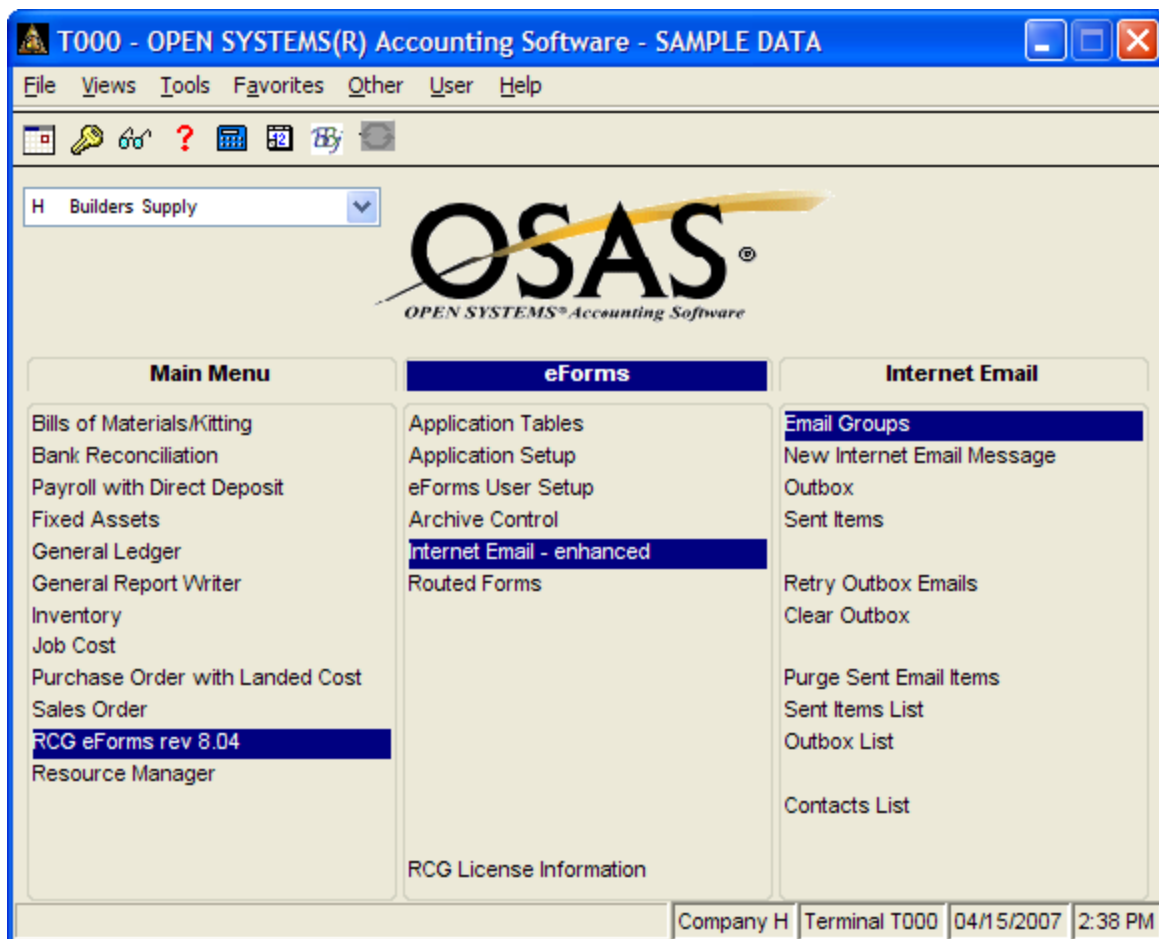
Internet Email can be sent two different ways. First, a simple message of up to fifteen lines of text can be sent to one or multiple recipients from the **Internet Email** menu using **New Internet Email Message**.   Also, whenever printing a report, the print options now include **Email**. When "**Email"** is selected, the report or document that would normally print to the printer will be redirected as internet email to the recipient(s) indicated.
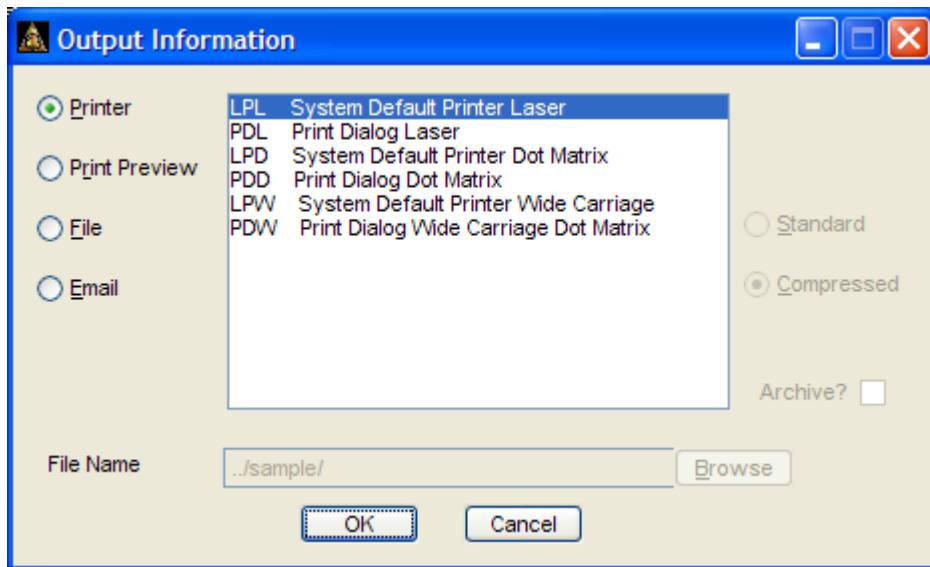
Email Groups

This function is used to set up groups of contacts to receive what we call **blast** email. You can import contacts into groups from your Customer, Vendor or Employee files using a number of different selection criteria, which can be easily customized.
You can also import contacts from an outside source, using a tab-delimited file. Contacts can also be added to groups one at a time, of course. You can even combine existing groups into larger groups, should you desire.

Note: in the example below, you'll notice that some entries actually list the email address and some don't. The entries which are preceded by "C" and which have blank email addresses are entries that are looked up by customer. When entered in this fashion, eForms will look up the email addresses on the fly when emails are sent. An email will be sent to every email contact for that particular company. So if you define a group once, you can be assured that each transmission to that group will use the latest email address for each company.

```
+---------------------------- Email Groups --------------------------------+
|    Group ID  RRW            Description  RRW'S GROUP                      |
|                                                                          |
|                                                                          |
+------------------------ Email Group RRW'S GROUP -------------------------+
|    ID    Email Address          Company              Attention          |
|          rrw@rcgweb.com         ACE BUILDERS         ACCOUNTS PAYABLE    |
| C ACE001                        ACE BUILDERS         ACCOUNTS PAYABLE    |
| C CASHMD                        CASH SALES-BALTIMORE,                    |
| C DAL001                        DALLAS-FT WORTH DOME  A/P                |
| C GRE001                        GREATER NEW YORK DOME MARTY D            |
| C KAN001                        KANSAS CITY GEODESIC  BLAIR P            |
| C CASHMN  * NO EMAILS *         CASH SALES-MINNEAPOLI                    |
|          rrwilson@rcgweb.com    KANSAS CITY GEODESIC  BLAIR P            |
|>C LOS001                        LOS ANGELES CONSTRUCT ACCOUNTS PAYABLE   |
| C SUN001                        SUNSHINE HOMES, INC.  RANDY SULIVAN      |
| C TEN001                        TENNESSEE SHELTERS, I AP                 |
|                                                                          |
|                                                                          |
+----------------------------------------------- Line (000009 of 000011) --+
|                                                                          |
|                    Enter = edit, Append, iMport                          |
+--------------------------------------------------------------------------+
+- Company H ----------------------------------------------------- Verify -+
```

Group ID: Six-character code to identify your email group.
Description: 35-character description for your group.

Building Email Groups:

Email groups can be built in a combination of ways. First, you can simply hit "**A**" to append a contact to your group. (You can also hit the **insert** key and insert the new contact between two others, if you want).

```
+---------------------------- Email Groups ---------------------------------+
|    Group ID  RRW               Description  RRW'S GROUP                    |
|                                                                           |
|                                                                           |
+------------------------- Email Group RRW'S GROUP -------------------------+
|+---------------------------- Append Line ------------------------------+ |
||     Lookup Code                                                       | |
||            ID                                                         | |
||   Email Address                                                      | |
|| OSAS Rpt Format  P                                                   | |
|| Acknowledgment?  N                                                   | |
||    Company Name                                                      | |
||       Attention                                                      | |
|+----------------------------------------------------------------------+ |
+|              Group, Customers, Vendors, Employees                     |-+
||                                                                      | |
|+----------------------------------------------------------------------+ |
+---------------------------------------------------------------------------+
+- Company H --------------------- Info --------------------- Verify -+
```

Lookup Code: refers to the source for looking up the contact that is to be added. This prompt appears when adding a contact to a group or choosing a contact when sending a message. The choices are as follows:
  ➢ **G**roup: to enter an existing email group and pull in all its contacts.
  ➢ **C**ustomers, **V**endors, **E**mployees: enter the customer/vendor/employee id and pull in information for that contact.
  ➢ **blank**: if you want to enter a contact without reference to any of the above-named lookups, simply leave it blank.

ID: If you selected **G**roup as the lookup code, enter the group code. If you chose Customers, Vendors, or Employees, enter the ID for that customer/vendor/employee. Inquiry windows are available for all of these options. When after the id is entered, the Company Name and Attention are filled in. If there is only one email address on file for that company, it will be automatically filled in as well.

```
+---------------------------- Email Groups ---------------------------------+
|    Group ID  RRW               Description  RRW'S GROUP                    |
|                                                                           |
|                                                                           |
+------------------------- Email Group RRW'S GROUP -------------------------+
|+---------------------------- Append Line ------------------------------+ |
||     Lookup Code  C                                                    | |
||            ID  ACE001                                                 | |
||   Email Address                                                      | |
|| OSAS Rpt Format  P                                                   | |
|| Acknowledgment?  N                                                   | |
||    Company Name  ACE BUILDERS                                        | |
||       Attention  ACCOUNTS PAYABLE                                    | |
|+----------------------------------------------------------------------+ |
+|      Leave this field blank to include all recipients for this ID     |-+
||          or hit <F2> to choose from a list of recipients             | |
|+----------------------------------------------------------------------+ |
+---------------------------------------------------------------------------+
+- Company H --------------------- Info --------- Inquiry ---------- Verify -+
```

Email Address:
Enter the email address for this recipient. If more than one email address is found for this customer/vendor/employee, an inquiry window is available to select from those on file. This window will display all of the email addresses for this contact, both from the Open Systems files (version 6.1x and higher) and the eForms email address database. If a lookup code and ID is entered and a new email address is entered, this email address will be added to the eForms database for that ID and will be available for all subsequent emails. As is indicated in the message at the bottom of the screen, if an ID has more than one email address on file and the email address field is left blank, the email will be sent
to all the email addresses for that ID.

OSAS Rpt Format:
When emailing reports or forms from OSAS, three types of output are available. The default is set up in the RC Table called **RPTXTx**. The three options are as follows:

- ➢ **T**ext attachment: the report or form is sent as a plain text email attachment.
- ➢ **P**DF attachment: this requires either UnForm or enscript/ghostscript 3rd party products to convert the document to Adobe PDF format and attach that PDF document to the email. If using UnForm, document will be enhanced according to the UnForm rules file defined in the table UNFEMxxx.
- ➢ **H**TML in body of email: The report or form is converted to simple HTML and is not sent as an attachment, but included in the body of the email itself. You may want to use this for recipients who may be leery of opening email attachments.

Acknowledgement:
If you want to request a notification of receipt from the recipient when they open your email message, enter **YES** here. This feature is dependent on the email receiving program being used by the recipient, which determines the manner that
return requests are handled.

Company Name:
The company name that corresponds with the Lookup ID appears. You can change it if you desire, and the new name will then be used when emailing to this contact.

Attention:
The name of the person or department you send invoices and statements to which was setup in AR/SO or AP/PO File Maintenance, General Information, will appear. You can change the name to correspond with the contact you have entered, if desired.

Building Email Groups, continued: Import Wizards

```
+--------------------------- Email Groups ---------------------------------+
|    Group ID  RRW             Description  RRW'S GROUP                     |
|                                                                          |
|                                                                          |
+------------------------ Email Group RRW'S GROUP -------------------------+
|    ID    Email Address          Company             Attention           |
|          rrw@rcgweb.com         ACE BUILDERS        ACCOUNTS PAYABLE     |
| C ACE001                        ACE BUILDERS        ACCOUNTS PAYABLE     |
| C CASHMD                        CASH SALES-BALTIMORE,                    |
| C DAL001                        DALLAS-FT WORTH DOME  A/P                |
| C GRE001                        GREATER NEW YORK DOME MARTY D            |
| C KAN001                        KANSAS CITY GEODESIC  BLAIR P            |
| C CASHMN  * NO EMAILS *         CASH SALES-MINNEAPOLI                    |
|          rrwilson@rcgweb.com    KANSAS CITY GEODESIC  BLAIR P            |
|>C LOS001                        LOS ANGELES CONSTRUCT ACCOUNTS PAYABLE   |
| C SUN001                        SUNSHINE HOMES, INC.  RANDY SULIVAN      |
| C TEN001                        TENNESSEE SHELTERS, I AP                 |
|                                                                          |
|                                                                          |
+------------------------------------------------- Line (000009 of 000011) --+
|                                                                          |
|                      Enter = edit, Append, iMport                        |
+--------------------------------------------------------------------------+
+- Company H ------------------------------------------------- Verify -+
```

In addition to adding contacts one at a time, Email Groups can also be built using the Import Wizard. Choose "**M**" to start the wizard.

First, the following prompt will appear:

Exclude contacts without email address on file?

Reply **YES** if you would like your group to include only ID's with email addresses on file. This is useful when used in conjunction with fax groups. You may want to send an email message to those ID's with emails on file, and a fax message to those without.

The Wizard window will then appear. Hit **F2** for a list of available wizards. These wizards are defined in the RC Tables. New wizards can be added or existing ones customized to suit your needs. If you have a specific wizard request, feel free to email rrw@rcgweb.com, and we will email you back the table changes necessary.

```
+---------------------- Import into Email Group RRW -----------------------+
|       Group RRW                                                          |
| Import Table                                                             |
|                                                                          |
|                                                                          |
| +-< Email Group Imports >----------------------------------+            |
| | Search                                                   |            |
| | Table ID   Title                                         |            |
| | < begin >                                                |            |
| |>WIZAPVE1  Email Group Import: Vendors                    |            |
| | WIZARCU1  Email Group Import: Customers                  |            |
| | WIZFILE1  Import from Tab delimited file                 |            |
| | WIZPAEG1  Email Group Import: Employees                  |            |
| | < end >                                                  |            |
| +----------------------------------------------------------+            |
+--------------------------------------------------------------------------+
|                                                                          |
+- Company H ------------------------------------- Inquiry ---------- Verify -+
```

The Customer file wizard provided has the following pick criteria. This example will add to our email group all customers who had sales last year between $1.00 and $999999.00.

```
+---------------------- Import into Email Group RRW2 -----------------------+
|         Group RRW2                                                        |
| Import Table WIZARCU1                                                     |
|                                                                          |
|                      Customer ID From                                    |
|                                  Thru                                    |
|                  Date Last Sale From                                    |
|                                  Thru                                    |
|                      Sales YTD From            .00                       |
|                                  Thru          .00                       |
|                  Sales Last Year From         1.00                       |
|                                  Thru   999999.00                       |
|                          Zip Code From                                   |
|                                  Thru                                    |
|                         Area Code From                                   |
|                                  Thru                                    |
+--------------------------------------------------------------------------+
|                                                                          |
+- Company H --------------------------------------------------- Verify -+
```

Simply hit **Page-Down** and the six customers who meet the criteria appear in the group. Notice that the email address does not appear here. These will be filled in when the email is actually sent, using the current email addresses for that customer at that time. So you can build a group and reuse it later, and the up-to-date email addresses will be used.

```
+-------------------------- Email Groups ----------------------------------+
|    Group ID  RRW2           Description  RRW GROUP                       |
+-------------------------- Email Group RRW GROUP -------------------------+
|    ID    Email Address         Company              Attention           |
| C DAL001                       DALLAS-FT WORTH DOME  A/P                 |
| C GRE001                       GREATER NEW YORK DOME MARTY D             |
| C KAN001                       KANSAS CITY GEODESIC  BLAIR P             |
| C LOS001                       LOS ANGELES CONSTRUCT ACCOUNTS PAYABLE    |
| C SUN001                       SUNSHINE HOMES, INC.  RANDY SULIVAN       |
|>C TEN001                       TENNESSEE SHELTERS, I AP                  |
+-------------------------------------------------- Line (000006 of 000006) --+
|                                                                          |
|                    Enter = edit, Append, iMport                          |
+--------------------------------------------------------------------------+
+- Company H --------------------------------------------------- Verify -+
```

New Internet Email Message

If you want to send a quick email to one or more of the contacts in your OSAS Customer, Vendor, or Employee files, this is the place to do it. This same function also conveniently appears on the **F4-Other Commands** menu, entitled **Quick Internet Email**. If you have defined Email Groups, you can also send the same message to everyone in one or more of those groups. Each message can be sent to multiple contacts, and may include any number of attachments. The following also applies when emailing a report or form by selecting e(M)ail from the output selection menu.

```
+--------------------- New Internet Email Message ------------------------+
|                                                                         |
|From                    RANDY WILSON                                     |
|Return Email            rrw@rcgweb.com                                    |
|Subject                 up-to 50 character subject line for my email     |
|Include Recipient List in Email?  NO                                     |
|Hello friends,                                                           |
|                                                                         |
|Here is an email that was sent directly from OSAS.                       |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
|                                                                         |
+-------------------------------------------------------------------------+
|             Send to, Attachments, Multiple recipients, Transmit         |
+- Company H -------------------------------------------------- Verify -+
```

From: The name of the sender should appear here. If the user id is filled in correctly in the RCG Utilities User Setup screen, the name should appear automatically. It may be changed on the fly if desired.

Return Email: This Return Email Address will be used when the email is sent so the recipient can reply back to you easily. It is read from the RCG Utilities User Setup screen but may be changed on the fly.

Subject: Fifty-character subject line.

Include Recipient List in Email? The default for this field is read from the RC Table **RLISTx**. If **YES** when an email is sent to multiple recipients, a list of all the recipients will be included in the body of the email. If **NO**, each recipient will receive a copy of the email message which appears as if it were sent to them alone.

Message Text: Fifteen lines of 75 characters are available for message text. These will appear in the body of the email.

Attachments: allows for entry of attachment files to be included with the transmission. Up to 999 attachments can be sent with each transmission.

```
+--------------------- New Internet Email Message ------------------------+
|                                                                         |
|From                    RANDY WILSON                                     |
|Return Email            rrw@rcgweb.com                                   |
|+---------------------- Email Attachment Files -------------------------+|
||                                                                       ||
|| >                                                                     ||
||                                                                       ||
|+------------------------------------------------------- Line (01 of 00) -+|
||                                                                       ||
+|                          Enter = edit, Append                        |+
|+---------------------------------------------------------------------+|
+- Company H --------------------------------------------------- Verify -+
```

Hit **Enter** to edit an existing attachment name, **A**ppend to add a new attachment.
The F2-inquiry will show all files existing in the **rcattach** directory (created at install time in your OSAS directory) and allow their selection. Any type of file can be first copied to the **rcattach** directory and then attached to your email.

```
+--------------------- New Internet Email Message ------------------------+
|                                                                         |
|+-< Email Attachment Files >------------------------+                    |
|| Search                                            |                    |
||  File Name                                        |--------------------+|
||  < begin >                                        |                   ||
||> 2kuhp47.cvr                                      |                   ||
||  rc61.zip                                         |                   ||
||  < end >                                          |                   ||
||                                                   |                   ||
||                                                   |                   ||
||                                                   |--- Line (01 of 00) -+|
||                                                   |                   ||
++--------------------------------------------------+                   |+
|+---------------------------------------------------------------------+|
+- Company H ------------------------------ Inquiry ---------- Verify -+
```

The filename will be appended with it's complete path. If you know the complete path of a file outside the **rcattach** directory, you can type it in as well, but be aware that an accurate full pathname is required. The **rcattach** directory is provided to make this easier by the use of the F2-inquiry.

```
+--------------------- New Internet Email Message ------------------------+
|                                                                         |
|From                    RANDY WILSON                                     |
|Return Email            rrw@rcgweb.com                                   |
|+---------------------- Email Attachment Files -------------------------+|
||                                                                       ||
|| > /u2/u/osas614/rcattach/rc61.zip                                     ||
||                                                                       ||
||                                                                       ||
||                                                                       ||
|+------------------------------------------------------- Line (01 of 01) -+|
||                                                                       ||
+|                          Enter = edit, Append                        |+
|+---------------------------------------------------------------------+|
+- Company H --------------------------------------------------- Verify -+
```

Once all the attachments have been added, hit F7-exit to return to the previous screen.

```
+----------------------- New Internet Email Message ------------------------+
|                                                                           |
|From                   RANDY WILSON                                        |
|Return Email           rrw@rcgweb.com                                      |
|Subject                up-to 50 character subject line for my email        |
|Include Recipient List in Email?  NO                                       |
|Hello friends,                                                             |
|                                                                           |
|Here is an email that was sent directly from OSAS.                         |
|                                                                           |
+---------------------------------------------------------------------------+
|            Send to, Attachments, Multiple recipients, Transmit            |
+- Company H ------------------------------------------------ Verify -+
```

Selecting Recipients: To setup the recipients for this email, hit **M**ultiple recipients.

```
+----------------------- New Internet Email Message ------------------------+
|                                                                           |
|From                   RANDY WILSON                                        |
|Return Email           rrw@rcgweb.com                                      |
+------------------------- Email Recipients ----------------------------+
|+------------------------- Append Line ------------------------------+ |
||      Lookup Code                                                   | |
||              ID                                                    | |
||    Email Address                                                   | |
|| OSAS Rpt Format   P                                                | |
|| Acknowledgment?   N                                                | |
||    Company Name                                                    | |
||       Attention                                                    | |
||                                                                    | |
||                                                                    | |
||       Date Sent                                                    | |
||       Time Sent                                                    | |
||  Status of Send                                                    | |
|+--------------------------------------------------------------------+ |
+|            Group, Customers, Vendors, Employees                    |-+
||                                                                    | |
|+--------------------------------------------------------------------+ |
+-----------------------------------------------------------------------+
+- Company H ------------------------------------------------ Verify -+
```

Lookup Code: refers to the source for looking up the contact that is to be added. This prompt appears when adding a contact to a group or choosing a contact when sending a message. The choices are as follows:
   ➢ **G**roup: to enter an existing email group and pull in all its contacts.
   ➢ **C**ustomers, **V**endors, **E**mployees: enter the customer/vendor/employee id and pull in information for that contact.
   ➢ **blank**: if you want to enter a contact without reference to any of the above-named lookups, simply leave it blank.

ID: If you selected **G**roup as the lookup code, enter the group code. If you chose Customers, Vendors, or Employees, enter the ID for that customer/vendor/employee. Inquiry windows are available for all of these options. When after the id is entered, the Company Name and Attention are filled in. If there is only one email address on file for that company, it will be automatically filled in as well. If you left lookup code blank, no ID will be requested. Skip to Email Address.

Email Address:
Enter the email address for this recipient. If more than one email address is found for this customer/vendor/employee, an inquiry window is available to select from those on file. This window will display all of the email addresses for this contact, both from the Open Systems files (version 6.1x and higher) and the eForms email address database. If a lookup code and ID is entered and a new email address is entered, this email address will be added to the eForms database for that ID and will be available for all subsequent emails. As is indicated in the message at the bottom of the screen, if an ID has more than one email address on file and the email address field is left blank, the email will be sent to all the email addresses for that ID.

OSAS Rpt Format:
When emailing reports or forms from OSAS, three types of output are available. The default is set up in the RC Table called **RPTXTx**. The three options are as follows:

- ➢ **T**ext attachment: the report or form is sent as a plain text email attachment.
- ➢ **P**DF attachment: this requires either UnForm or enscript/ghostscript 3rd party products to convert the document to Adobe PDF format and attach that PDF document to the email. If using UnForm, document will be enhanced according to the UnForm rules file defined in the table UNFEMxxx.
- ➢ **H**TML in body of email: The report or form is converted to simple HTML and is not sent as an attachment, but included in the body of the email itself. You may want to use this for recipients who may be leery of opening email attachments.

Acknowledgement:
If you want to request a notification of receipt from the recipient when they open your email message, enter **YES** here. This feature is dependent on the email receiving program being used by the recipient, which determines the manner that
return requests are handled.

Company Name:
The company name that corresponds with the Lookup ID appears. You can change it if you desire, and the new name will then be used when emailing to this contact.

Attention:
The name of the person or department you send invoices and statements to which was setup in AR/SO or AP/PO File Maintenance, General Information, will appear. You can change the name to correspond with the contact you have entered, if desired.

Date Sent, Time Sent, Status of Send: ignore these fields, they'll be filled in later when the email is sent, for later reference.

Page-Down to accept the recipient, and continue to add/change recipients until your list is as you want it. Once your recipient list is complete, hit F7-exit to return to the previous screen.

```
+---------------------- New Internet Email Message ------------------------+
|                                                                          |
|From                    RANDY WILSON                                      |
|Return Email            rrw@rcgweb.com                                    |
|Subject                 up-to 50 character subject line for my email      |
|Include Recipient List in Email?  NO                                      |
|Hello friends,                                                            |
|                                                                          |
|Here is an email that was sent directly from OSAS.                        |
|                                                                          |
+--------------------------------------------------------------------------+
|            Send to, Attachments, Multiple recipients, Transmit           |
+- Company H -------------------------------------------------- Verify -+
```

Once the attachments and recipients are entered, hit **T**ransmit to send the email. You will be asked to verify by hitting **Page-Down**.

If you want to send a quick email to one recipient with no attachments, use the **S**end to shortcut button. This will prompt you for one recipient and then send the email immediately after you enter it, without asking for verification.

When the email begins to transmit, you will see the progress of the transmission on your screen. This conversation with the mail server is displayed just so you can know that something is happening. When the email is complete, the screen will disappear, unless it is unsuccessful for some reason. If it is unsuccessful, a message will display which attempts to describe the problem. The unsuccessful email will remain in your eForms Email Outbox until the problem is resolved and it is sent successfully. For more on the outbox, see that section later in this document.

```
+------------------------ Sending Internet Email ---------------------------+
| Preparing Email up-to 50 character subject line for my email             |
|  Checking for mailhost.rcgweb.com try number 1                           |
|    To: rrw@rcgweb.com                                                     |
| 220 linuxweb.com ESMTP                                                    |
| 250-linuxweb.com                                                         |
| 250 ok                                                                    |
| 250 ok                                                                    |
| 354 go ahead                                                             |
|    Attachment /u2/u/osas614/rcattach/rc61.zip                            |
|    Encoding...         65000                                             |
+--------------------------------------------------------------------------+
|                                                                          |
+--------------------------------------------------------------------------+
```

Sent Email Items

Once transmissions are sent, they are placed in the Sent Items list. From here they may be edited and resent to the same or different recipients. They may be deleted, along with their accompanying attachment files, by simple use of the F3 delete key.

```
+------------------------------ Sent Items --------------------------------+
|                                    Search 1                              |
|   Terminal/User rrw                Search 2                              |
|   Start Date:                      Search 3                              |
+--------------------------------------------------------------------------+
|    Date      Time Status Subject                                        |
|                                                                          |
| 12/04/2000 10:26    2                                                    |
| 12/04/2000 16:41    2     Invoice # 12670064                            |
| 12/04/2000 16:42    2     Invoice # 12670046                            |
| 12/04/2000 16:43    2     Invoice # 12670064                            |
| 12/04/2000 16:57    2     Invoice # 12670001                            |
| 12/04/2000 17:06    2     Invoice # 12670010                            |
| 12/04/2000 17:07    2     Invoice # 12670013                            |
| 12/04/2000 17:08    2     Invoice # 12670010                            |
| 12/16/2000 13:34    2     Invoice # 00000007                            |
| 12/16/2000 13:36    2     test                                          |
| 12/19/2000 16:13    2     up-to 50 character subject line for my email  |
|>12/19/2000 17:17    2     bad email message test                        |
|                                                                          |
+--------------------------------------------------------------------------+
|              <Enter>=Edit/Resend, Recipients, Attachments,              |
|                Start date/search, Terminal/User, Goto date             |
+- Company H --------------------- Info --------------------------- Verify -+
```

Navigate up and down in this screen to view sent email items for a particular user. To check Sent Items for a different user, select **T**erminal/User. Use **G**oto date to jump to a specific date. Select **S**tart date/search to get back to the top of the window and enter a new start date or search criteria to limit the Sent Items that are displayed. The search function looks for any of the three search strings in the Subject, the recipient, and the fifteen-line text for each message.

To resend a message, point to it and select **<enter>.** A new email message will be created which is an exact copy of the original. At this point you can modify the recipients, the attachments, or anything else about the message you want, or you can simple resend it as is.

To display more detailed information about a particular sent message, point to a specific message and select **R**ecipients, or **A**ttachments.

The **R**ecipients button shows who received this particular message.

```
+------------------------------ Sent Items --------------------------------+
|                                    Search 1                              |
|   Terminal/User rrw                Search 2                              |
|   Start Date:                      Search 3                              |
+-------------------------- Email Recipients ------------------------------+
|       Email Address          Company              Attention             |
|>!     randy.wilson           RESPONSE COMPUTER    RANDY WILSON          |
|       rrw@rcgweb.com         RESPONSE             RANDY WILSON          |
|                                                                          |
|                                                                          |
|                                                                          |
|                                                                          |
|                                                                          |
+-------------------------------------------- Line (000001 of 000002) --+
|       Add/edit recipients or <F7> to approve recipients for sending.    |
|                        Enter = edit, Append                            |
+--------------------------------------------------------------------------+
+- Company H ----------------------------------------------------- Verify -+
```

Hit **<enter>** to view the particulars about a given recipient. Here we see that this particular recipient did not receive the message, because of a bad email address.

```
+------------------------------ Sent Items --------------------------------+
|                                Search 1                                   |
|   Terminal/User rrw                Search 2                               |
|   Start Date:                      Search 3                               |
+-------------------------- Email Recipients ------------------------------+
|+----------------------------- Edit Line ------------------------------+ |
||       Lookup Code                                                     | |
||               ID                                                      | |
||    Email Address   randy.wilson                                       | |
|| OSAS Rpt Format    P                                                  | |
|| Acknowledgment?    N                                                  | |
||     Company Name   RESPONSE COMPUTER                                  | |
||         Attention  RANDY WILSON                                       | |
||                                                                       | |
||                                                                       | |
||         Date Sent                                                     | |
||         Time Sent                                                     | |
||    Status of Send  Bad address randy.wilson                           | |
|+----------------------------------------------------------------------+ |
+|                                                                      |-+
||                                                                      | |
+- Verification ------------------------------------------------------------+
|                        Press <PgDn> to proceed                            |
+---------------------------------------------------------------------------+
```

Selecting **A**ttachments shows the attachments that were sent with the message.

```
+------------------------------ Sent Items --------------------------------+
|                                Search 1                                   |
|   Terminal/User rrw                Search 2                               |
|   Start Date:                      Search 3                               |
++----------------------- Email Attachment Files -------------------------++
||                                                                        ||
|| > /u2/u/osas614/rcattach/rc61.zip                                      ||
||   /etc/passwd                                                          ||
||                                                                        ||
||                                                                        ||
||                                                                        ||
||                                                                        ||
|+------------------------------------------------- Line (01 of 02) -+|
+|                                                                    |+
||                          Enter = edit, Append                      ||
|+--------------------------------------------------------------------+|
+- Company H ------------------------------------------------ Verify -+
```

Sent Items List

The Sent Items List Reports allows printing of information regarding the sent messages of any or all users. The list can be printed with or without the recipient lists for each message. Up to three search strings may be entered to check the recipients, subject lines, and fifteen text lines of each message, and to limit the report to those messages matching the searches.

Purge Sent Items

This maintenance function allows you to purge all the send messages for a given user within the designated date range. This cleanup procedure may be run periodically to free up disk space.

Email Outbox

The Outbox screen gives access to all of those transmissions which have been requested but not yet sent for one reason or another. Requests may be changed or deleted from here, and information may be found regarding the cause of the failure of each waiting transmission. For example, you may have one bad email address in your list of recipients. The email will be sent successfully to the good addresses, but the message will remain in the outbox until the problem is resolved. You will see a message like this:

```
+----------------------- Sending Internet Email ---------------------------+
| Preparing Email bad email message test                                   |
|  Checking for mailhost.rcgweb.com try number 1                           |
|    To: randy.wilson                                                      |
|         Bad Email Address...not sent                                     |
|    To: rrw@rcgweb.com                                                    |
| 220 linuxweb.com ESMTP                                                   |
| 250-linuxweb.com                                                         |
| 250 ok                                                                   |
| 250 ok                                                                   |
| 354 go ahead                                                             |
| 250 ok 1040334036 qp 16679                                               |
|    Done!                                                                  |
!                                                                          |
+- Message ----------------------------------------------------------------+
|                           Some failed.                                   |
|         <Enter> to Skip to Next Email or <F7> to exit and send later     |
+- Company H -------------------- Info -------------------------- Verify -+
```

Enter the outbox after hitting **<F7>** and you'll see the following:

```
+------------------------------ Outbox ----------------------------------+
|                               Search 1                                 |
|  Terminal/User rrw                Search 2                              |
|  Start Date:                      Search 3                             |
+------------------------------------------------------------------------+
|   Date     Time Status Subject                                         |
|                                                                        |
|>12/19/2000 16:52   1   bad email message test                         |
|                                                                        |
+------------------------------------------------------------------------+
|             <Enter>=Edit/Resend, Recipients, Attachments,             |
|                   Start date/search, Terminal/User                    |
+- Company H -------------------- Info -------------------------- Verify -+
```

Hit **R**ecipients and you'll see the problem child identified with a "**!**" character on the left. Note the other buttons that are available. **A**ttachments gives you access to the attachments list for this message. **T**erminal/User will allow you access to the outbox for other users. The **Enter** and **S**tart date/search buttons are also active for the outbox, but are really designed for the Sent Items screen. See the later section on Sent Items for their description.

```
+------------------------------- Outbox -----------------------------------+
|                                Search 1                                  |
|   Terminal/User rrw               Search 2                               |
|   Start Date:                     Search 3                               |
+----------------------------- Email Recipients ---------------------------+
|         Email Address          Company              Attention            |
|>!       randy.wilson           RESPONSE COMPUTER    RANDY WILSON         |
|         rrw@rcgweb.com         RESPONSE             RANDY WILSON         |
+----------------------------------------------- Line (000001 of 000002) --+
|         Add/edit recipients or <F7> to approve recipients for sending.   |
|                         Enter = edit, Append                             |
+--------------------------------------------------------------------------+
+- Company H -------------------------------------------------- Verify -+
```

Point to a recipient and hit **Enter** to edit the email address, or just **<F3>** to get rid of it. You can even Append recipients to the list at this point if you want.

Retry Outbox Emails

Normally, internet email is sent immediately when the request is made. Sometimes situations occur which block the sending of email requests (network problems, phone line connections, ISP problems, etc.). If emails get "stuck" in the outbox for one reason or another, this function retries all of the failed requests that are waiting. If a problem occurred with only some of the recipients in a blast email, only those that failed will be retried. If emails remain stuck in the outbox for some other reason, you may want to just remove it. If you know who sent it, go into their outbox, point to the message, hit **R**ecipients, and **<F3>** to delete the recipients marked with "!"

Clear Outbox

Alternately, you can clear all problems in the outbox in one procedure. Sometimes the email outbox can get jammed up with problem messages that result from entering invalid email addresses, etc. If the user who is sending the email doesn't clean up the problem right away, another attempt will be made to send the message each time they send another one. To clear the outbox of such problem messages, select Clear Outbox. This will make one attempt only to send all items in the outbox, and will move the messages to the user's Sent Items regardless of whether the message is successfully sent to all recipients. Those recipients which were not sent will be flagged with "!" in the Sent Items Recipients list.

Outbox List

The Outbox List provides an overall look at the outbox in report format. This can be handy when there are problem emails in the outbox and it is not immediately clear which user did the sending. Print the outbox list for all users to identify the problem.

Contacts List

The Contacts List Report allows you to print any or all of your fax and email contacts on one report. This report can be used to print the current status of contacts to help maintain the database. It can also be used with the All Customers/Vendors option to list indicate which customers/vendors have no fax number or email address on file. The phone numbers can also be included for easy reference when calling for updates.

Email Contacts (Customers, Vendors, Employees)

OSAS 7.5 introduced an enhanced Email Contacts database for the Customers, Vendor and Employee files. eForms uses that database and allows selection from the list of contacts when sending an email. eForms adds the ability to add fax contacts to this database so that a mixture of fax and email transmissions can be sent to the same customer/vendor/employee. The faxing method is determined by the setting in the Application Setup screen. The recommended method is via an account with www.metrofax.com. When prompting for email contacts, eForms will also list the fax number in the main customer/vendor file as an output option.

Edit E-Mail Addresses

Commands Edit Modes Other Help

| OK | Abandon |

Type	Invoice
Email/Fax	Email
E-Mail	rrw@rcgweb.com
Name	Randy Wilson
Description	Response Computer Group

Edit E-Mail Addresses

Commands Edit Modes Other Help

| OK | Abandon |

Type	Invoice
Email/Fax	Fax
E-Mail	8009574724
Name	Randy Wilson fax
Description	Response Computer

This screen allows you to enter multiple email addresses for each customer, vendor, or employee with unique options set for each contact. If multiple addresses are entered, an inquiry option will be available when sending email to select the correct recipient within that company's list.

Type:
The contact type is used to route forms to email, or print, depending on the contact's preference. If you enter "Invoice" in the contact type, that customer will receive their invoice at this email address. Multiple "Invoice" entries are allowed for each customer, in which case all of them would receive an invoice. In the current version of eForms, you can mix and match fax and email contacts so that a customer could receive an invoice via email **AND** via fax. If a customer has only one email address, it should be added again for each form type that the customer wishes to receive.

Email/Fax:
Select email or fax.

E-Mail:
Enter the email address or fax number (numbers only, no dashes, etc).

Name:
Name of the contact.

Description:
Other information about the contact, such as company name, etc.

Batch Forms

The Batch Forms option of eForms is a powerful tool for the routing of plain-paper or UnForm-enhanced forms to email or fax, for those contacts who have the indicated form-codes setup in the eForms Email Address and Fax Number databases.   While the code is included in each install, the functionality is only enabled if the Batch Forms add-on has been purchased with eForms. This is accomplished through the activation of the product when you provide RCG with your OSH serial number. If batch forms has not been activated, forms will be printed only when the batch forms functions are executed.

AR Invoices, Statements, and History Invoices have been included on the RCG Utilities Menu, under the heading "Batch Forms" for OSAS versions 6.1x and higher. These make use of the form codes ARINVX and ARSTMX which are added to the OSFRM file during the eForms install. Purchase Orders have also been included, using the form code POFRMX. The default behavior is to print two copies of the form: one to be routed to the client according to their preference (emailed/faxed/printed and mailed) and a second copy for "Accounting". This can be modified by changing the form code definitions in RM, System File Maintenance, Form Codes. If you want only the routed copy, change the number of copies to 1. If you want more copies, just add them to the list. See your Resource Manager Documentation for details. Just be careful to leave the copy 1 as is, since this is setup in a special way to facilitate the routing.

To setup a customer to receive their invoices or statements via email or fax, add entries to the Customer Email Addresses database found in RCG Utilities, Internet Email, or the Customer Fax Numbers found in RCG Utilities, Faxing. In either case, add the contact(s) for the customer who are to receive the form. For Statements, use Form code "S"; for Invoices, use Form Code "I". If the same recipient is to receive both invoices and statements, you'll need to enter them twice. Once with an I, once with an S. The program will check for routing contacts for each customer as their form is printed in the order defined in the table XMITPRI. This table can also be used to turn off routing to email, faxing, or both (should there be a system problem with one or the other). Just change the value in the table to 0, and that option will not be used. If email or fax contacts are not found for the form being routed, it will be printed for mailing.

Setup vendors similarly for Purchase Order routing, but use Vendor Email Addresses or Vendor Fax Numbers, and use the form code "P".

Any batch printed form can be routed with eForms with some simple programming changes made to the print programs. Form Codes 0-9 are made available for routing of your custom forms. See Appendix B for details.

See Customer/Vendor/Employee Email Addresses and Fax numbers sections elsewhere in this document for instructions on setting up the contacts.

If you need to load contacts from your existing OSAS database, the following method may be used:

```
eForms/Internet Email/Email groups
Enter group id *RCIMPORT.  This will not create a new group, but will
allow you to import your contacts into customer email addresses.
```

```
Leave description blank and hit enter.
Select i(M)port.
Answer YES to "Exclude contacts without email address on file?"
For your import table, choose WIZARCU1 to add customer contacts. (You
could also choose WIZAPVE1 for vendor comments, or WIZPAEG1 for
employees).
Enter the Form Type you want to load.  For invoices, this would be "I";
for statements, "S", etc. A selection screen will then display with
from/thru for some of the customer fields.  If you want all customers to
be loaded, leave all selections blank.  You can selectively choose a group
of customers by filling in the from/thru values.  When you hit page-down,
eForms will load those customers with email addresses into Customer Email
addresses with the form type you indicated.
```

```
+-------------------------- SAMPLE DATA PATH ---------------------------------+
| 12/23/2000              Company H - Builders Supply             4:31 PM    |
+----------------------------------------------------------------------------+
|                                                                            |
|                      +- Main Menu --------+                                |
|                      |                    |                                |
|                      |   +- RCG Utilities -----------+                     |
|                      |   |                           |                     |
|                      |   |   +- Batch Forms Transmission Functions -+      |
|                      |   |   |                                      |      |
|                      |   |   |   Statements                         |      |
|                      |   |   |   Invoices                           |      |
|                      |   |   |   History Invoices                   |      |
|                      |   |   |   Purchase Orders                    |      |
|                   +-- |   |                                         |      |
|                      +-- |   Transmit Forms Log                     |      |
|                          |   Purge Transmit Forms Log               |      |
|                          |                                          |      |
|                          +------------------------------------------+      |
|                                                                            |
|                                                                            |
|                                                                            |
|                                                                            |
| T0------------------ OPEN SYSTEMS (R) Accounting Software ------------------+
```

For OSAS versions 6.1x and higher, eForms batch functionality is built-in for Statements,
Invoices, History Invoices and Purchase Orders. All that is required is that the contacts be
setup with the correct form codes, and that the eForms version of the batch forms program be
run in the normal way. If UnForm is used, the rules file called osas614.rul is pre-configured
to work with these programs. Special Form Codes have been setup in Resource Manager,
System File Maintenance, Form Codes, called ARINVX, ARSTMX, and POFRMX. Other
forms may be easily modified to take advantage of the eForms batch routing functionality as
well. Programmers can find details in Appendix B. Most forms can be eForms-enabled in an
hour or so.

The **Transmit Forms Log** shows the details of all forms that are routed to fax or email. This
log can be purged periodically using **Purge Transmit Forms Log.**

Batch Archiving by Customer:

When Archiving is turned on for the custom version of A/R Invoices and Statements which
are provided on this menu (programs ARPRI.RCB and ARSTM.RCB), eForms will archive
each individual invoice or statement into a subfolder named after the Customer ID and Name
(OSAS versions 6.1x and higher).

Appendix A
Installation Instructions

UNZIPPING AND INSTALLING THE PROGRAMS:

Before installing, perform a backup by copying at least the sysfil and progRM directories. To revert back to standard or to "uninstall" eForms, you can copy back these directories. As of version 7, all eForms programs will be installed in a new directory called progRC. The "mods" directory for Resource Manager will also be changed to "../progRC". To revert back to standard OSAS Resource Manager, simply change the "mods" directory for RM back to blanks.

The eForms installable zip file installs in the same manner as the periodic updates from Open Systems: create an "install" directory, copy the zip file there and unzip it, as follows:

Syntax for Windows: pkzip25 -ext -dir rc652.zip
To install, use the pkzip25 program (from the progRM directory of the 6.1x installation you are updating).
Syntax for UNIX/Linux: If you installed from the 6.11 CD -
use pkunzip -N rc612.zip.
If you installed from the 6.12 CD - use pkzip25 -ext -dir rc612.zip.
To install, use the pkunzip/pkzip25 program (from the progRM directory of the 6.5x/6.1x installation you are updating).

Once it is unzipped successfully, change the install directory in RM, System File Maintenance, Directories, and then Goto RM, Install Applications. Once the application is installed successfully, execute Create Data Files for each company for Application RC.

IMPORTANT: When creating RC files, you will be prompted: "RM files already exist, overwrite them?" Be sure to respond "NO" to this question. You do not want to overwrite any existing data files.

As of June, 2006, there is no separate licensing step. The eForms zip file you received will contain the licensing files which will be automatically installed.

Each eForms user must be defined in **eForms User Setup** before using eForms to email, fax or archive. In OSAS 7.5 the user id should default to the OSAS user id. Each user will have only one outbox, sent items list, return email address, etc. There is no harm in sharing the user id between multiple users; eForms will consider them one user, use up one user license slot and use the same user setup for all. See the section on **eForms User Setup** for more information.

CONFIG.BBX ISSUES:

Once you have the product installed, you need to make some changes to your config.bbx file.

TCPIP Sockets: (email only)

The method of sending email within OSAS requires TCP/IP sockets. This feature is only available with PRO5/VPRO5 version 2.23 or later. Beginning with OSAS 6.1, Open Systems now distributes a Resource Manager that includes socket capability. If you are using an older version of OSAS, you will need to upgrade and install the OSAS 6.1 product. You do NOT have to convert all your existing applications; the only requirement is that your older OSAS used the newer PRO5/VPRO5 interpreter.

Enable socket communication within OSAS
This line must be added to you config.bbx file. The easiest way to add this is to use RM, Workstation Configuration, Devices. The system will prompt for a backup file, press enter to use the default config.bak. Press A to append a new line, press O for other, and enter the exact text below:

alias N0 tcp
(note: the above is N+zero, not the letter "O")
Now select W to write the changes to the file.

Increase DEVS= for vpro5 in a windows environment. If a DEVS= line already exists in the config.bbx, make sure it is at least DEVS=10. If it doesn't exist, add a line. The easiest way to add this is to use RM, Workstation Configuration, Devices. The system will prompt for a backup file, press enter to use the default config.bak. Press A to append a new line, press O for other, and enter the exact text below:

DEVS=10
Now select W to write the changes to the file.

PF file print setup: (email and faxing)

Both email and faxing work by redirecting print output to a file, formatting the text, and passing the result to the internet email (SMTP) or fax server for sending. Archiving also prints to a file before routing the results to the archive file and the printer. The config.bbx file must have at least one line setup to enable printing to a file. It should be as follows:

alias PF $FILE "Print file" SPCOLS=140,CPCOLS=140,FILE=PRINT.1

It is important that the SPCOLS and CPCOLS be set, to avoid error 01's when printing. Some older configurations have a PF line for each terminal id in the config.bbx. If this is the case, each of them must have a SPCOLS and CPCOLS setting. It is important the SPCOLS an CPCOLS be set to be at least as high as the highest setting for any of the printer aliases. eForms requires this so that there will be no chance of error 01's while executing a critical function such as a post.

In a Windows environment, (unless you're using bbj) it may be necessary to change this slightly, if you find that the eForms output is missing lines.

alias PF $FILE "Print file" LF=0D0A,SPCOLS=140,CPCOLS=140,FILE=PRINT.1

UnForm Rules File:

A rules files for OSAS 6.1 is supplied by SDSI on their website. We have honed this a bit for our application and have included it in the install. After installing it will be found in the progRM directory, called osas614.rul. It also works with later versions of OSAS. You should copy this to your unform directory and use this with eForms. If you have a custom rules file already, the parts to look for in osas614.rul are the Fax cover page section at the bottom, and the sections for plain-paper statements and invoices. Modified lines are marked with rrw/rcg comments.

VSIfax/Hylafax and UnForm combination: (faxing only)

The same fax cover page rules set included in osas614.rul is also installed into your progRM directory named faxcover.rul. If you do not want to use the osas614.rul file that is supplied, you can merge in the faxcover.rul file into your rules file to make the fax cover page work with vsifax or hylafax. This is only needed if you are using the faxing module with VSIfax or Hylafax and UnForm. Merge these rules into your OSAS rules file for UnForm and modify them according to your wishes. If you have a logo and letterhead working for the standard 6.1 AR Invoice, the same look will appear at the top of your fax cover pages. If you do not merge in this section of code, you will encounter errors when faxing using VSIfax or Hylafax together with UnForm.

PDF file generation: (archive, email)

eForms can generate output in pdf (adobe) format if the necessary third-party applications are in place. If UnForm (from SDSI) is used to create professional-looking forms, eForms can also use it to create pdf files. Select the UNFORM option in Application setup and fill in the appropriate values.

If UnForm is not installed, pdf files can also be generated using the open-source utilities enscript and ghostscript. These utilities are freely distributed. The path for the ghostscript executable must be Application Setup screen and the PDF Generation method set to FREEWARE. For convenience, compiled versions for windows and SCO unix environment can be downloaded from our website at www.rcgweb.com/public_download/. Following are notes from the readme.txt file also found on our website.

enscript is a utility that converts text to postscript. It will be needed when using eForms without the UnForm product from SDSI. eForms will use enscript to
1) perform the first step in the text-to-postscript-to-pdf process for pdf internet email
   attachments and pdf archive files
2) create postscript files for faxing when using Hylafax

ghostscript is a utility that converts postscript and pdf files to a number of different formats.
In the unix/linux world, the command is "gs", in windows, it is gswin32c.exe. eForms will need ghostscript for two purposes:
1) to finish the text-to-postscript-to-pdf conversion for archive and email when Unform is not
available for pdf creation
2) when faxing with Unform and Hylafax, to create postscript from the unform-generated pdf.

The following utilities are provided on our website for convenience. They have been downloaded from other sites and we don't guarantee that they are the latest versions. Feel free to download the utilities from the other sites yourself.

Windows:
enscript.zip
This is a windows version of the GNU enscript utility taken from http://people.ssh.com/mtr/genscript/windows-95-NT/. eForms is hard coded in the Windows environment to look for the contents of this file to be unzipped into the OSAS directory. This will create a new directory called enscript with all the necessary files to run it. The enscript.cfg file in this zip file has been customized to fit this scenario.

gs814w32.exe
This is a windows version of ghostscript. Latest versions can be found at
http://ghostscript.com/doc/AFPL/index.htm

SCO Unix:

http://www.caldera.com/skunkware/textproc/
has versions of gs (ghostscript) and enscript

Included here for convenience are the versions for open server 5.

enscript-1.6.1-VOLS.tar
To install:
tar xvf file into directory, cd into that directory,
custom -p SKUNK98:Enscript -i -z `pwd`
add /usr/local/bin to path or cp /usr/local/bin/enscript /usr/bin

gs-6.0-VOLS.tar
To install:
tar xvf file into directory, cd into that directory,
custom -p SKUNK99:GS -i -z `pwd`
add /usr/local/bin to path or cp gs /usr/local/bin /usr/bin

Linux:
Should already have these utilities installed.

Tables:

Most of the eForms setup for version 7.5 is now handled in the Application Setup screen on the eForms menu. See that section above. There remain some tables that can be used for special situations. All of these tables conform to the OSAS standards which allow one table for all companies or separate tables for each company. If you make a copy of the table and use the Company ID as a suffix, that table will be used for that company ID only. Be sure not to enter table data in the title area, above the dashed line. eForms will look for table settings only in the data area of the table, below the dashed line.

```
EFAXA: faxing
If you want one email address to be used as the sender email address when sending
faxes through an email-to-fax gateway (metrofax, efax), enter that email address
here.  If this is blank, the email/fax will be sent with the user's return email
address.  If you use that method, be sure that each user's email address is on file
with your account at metrofax or efax, or the fax will not be forwarded to your
recipient.

+-------------------------------- RCTB ------------------------------------+
| Table ID EFAXA      Description EMAIL ADDRESS FOR EFAX.COM ACCOUNT        |
| Number of Cols   1  Column Length  50      Type  A                       |
|EMAIL ADDRESS FOR EFAX.COM EMAIL TO FAX ACCOUNT                           |
|------------------------------------------------                          |
|rrw@rcgweb.com                                                            |
|                                                                          |
|                                                                          |
+- Company 1 --------------------------------------------------- Verify -+

FXPGM: faxing
The recommended faxing option for OSAS 7.5 is metrofax.com.  Other fax options were
supported in the past, and the programs are still included with eForms, but have
not been tested with OSAS 7.5.  These can be attempted by using the "OTHER" fax
option and filling in the legacy tables as described in the following.

If faxing is installed, you must enter the name of the fax server you are using
on the first line of the table.  Until recently, VSIFAX was the only fax server
program we supported.  As of August, 2004, eForms can be used with Hylafax, a free
open-source fax server product available for Unix and Linux systems at
www.hylafax.org.  Another option is to subscribe with one of the email-to-fax
services metrofax.com or efax.com.  These options are fully supported within our
faxing module.  The user can "fax" to the fax numbers on file for a contact, and
the software will generate an email to metrofax or efax which will then be routed
to the recipient's fax machine.  All of these fax options can be used alone to fax
plain-paper documents, or with UnForm, to fax enhanced, more professional-looking
documents.

The choices for entries to this table are:
VSIFAX
EFAX.COM
HYLAFAX
RCFXSND.PWFAX32
RCFXSND.PWPCL

To email/fax using metrofax.com instead of efax.com, enter the word METROFAX into
the second line of the table (under EFAX.COM).

Programmer's note: RCFXSND.VSI is the called program for VSIFAX, RCFXSND.HYL is the
called program for Hylafax.  To run a customized version, save that program to
RCFXSND.XXX (3 characters replacing the XXX) and make sure that the enter list
matches RCFXSND.VSI and RCFXSND.HYL.  Then put the name of your new program in
place of one of the standard choices, and it will be called instead.
Hylafax may be used in direct command-line mode if OSAS and hylafax reside on the
same server.  Alternately, it may be used in a "client-server" fashion when OSAS
resides on a different server (client-server may be used when hylafax is on the
```

same server as well, if desired). To use this client server model, put HYLAFAX in
this FXPGM table, and see the additional table HYLFX.

```
+------------------------------- RCTB -------------------------------------+
| Table ID FXPGM      Description PDF CONVERSION PROGRAM                    |
| Number of Cols   1  Column Length 70     Type  A                         |
|NAME OF FAX SOFTWARE                                                       |
|------------------------------------------------------------------------- |
|EFAX.COM                                                                  |
|METROFAX                                                                  |
|FIRST LINE OF THIS TABLE SHOULD CONTAIN ONE OF THE FOLLOWING CHOICES:      |
|HYLAFAX                                                                   |
|EFAX.COM  (ADD METROFAX ON LINE 2 TO USE METROFAX INSTEAD OF EFAX.COM      |
|VSIFAX                                                                    |
|                                                                          |
+- Company 1 ----------------------------------------------------- Verify -+
```

Another faxing option is available which uses the Print Wizard Server product from
anzio.com as a bridge to a Windows fax32 server. To use this option, put
RCFXSND.PWFAX32 in the FXPGM table. This requires a pdf generator (unform, or
enscript/gs) to generate pdf's and send them to print wizard. We recently added
another option: RCFXSND.PWPCL, which creates pcl (using unform if it's available,
or needing no 3rd party software for plain-jane pcl) and passes it to print wizard.
Print wizard has demonstrated problems with pcl in some cases (using unform 7). In
those situations the pdf method was successful. See Documentation on PWFAX table
below for further settings.

```
┌───────────────────────────── RCTB ─────────────────────────────┐
 Table ID FXPGM      Description FAX SERVER IDENTIFIER
 Number of Cols   1  Column Length 70     Type  A
NAME OF FAX SOFTWARE
│-------------------------------------------------------------------
RCFXSND.PWFAX32

└─ Company 1 ─────────────────────────────────────────── Verify ─┘
```

PWFAX: faxing using windows fax server and Print Wizard Server

This fax option requires the purchase and installation of the "Print Wizard Server"
product from anzio.com. The product may be purchased with the minimum number of
users and should be installed on a windows server with the fax32 fax server already
installed and able to send faxes (from a Windows application, for example). PW
server will act as a bridge between OSAS and fax32 to automatically fax documents
from OSAS.

```
┌───────────────────────────── RCTB ─────────────────────────────┐
 Table ID PWFAX      Description PRINT WIZARD FAX
 Number of Cols   2  Column Length 35     Type  A
PARAMETER                          VALUE
│-------------------------------- ----------------------------------
Print Wizard to OSAS IP or Drive   D:
Print Wizard to OSAS Absolute Path \OSAS7VPRO\
OSAS to Print Wizard Path          \OSAS7VPRO\PW\

└─ Company 1 ─────────────────────────────────────────── Verify ─┘
```

Create a table as indicated.
The first two entries create a path for Print Server to use to find the files
needed for faxing. From the print wizard server's point of view, these will be
combined to access the rcfax folder under OSAS. If OSAS is running on a different
server than print wizard, provide the ip number for the server. Otherwise, provide
the drive letter. OSAS will use these entries to create the fax command for print
wizard. Print wizard must have full access to this folder and the rcfax folder
under it. The third entry is the folder where OSAS will put the print wizard
command files. This is relative to OSAS. It is best to use the complete path.

38

You must create the directory before attempting to fax and make sure that both osas users and print wizard have full rights to access it.

After installing PW server, create a print wizard service, set to Despool with the directory set to this directory. PW server will then look in this directory for its command files and execute them as they are found. The command files will contain one line, something like this:

!FAX32 /x"13023354543" /a"D:\OSAS7VPRO\rcfax\7hhj4521.unf.cvr.pdf" /a"D:\OSAS7VPRO\rcfax\7hhj4521.unf.pdf"

FXPTH: faxing (VSIFax only)
When using VSIfax, there must be two-way connectivity between the directory where
the OSAS programs and data reside, and the directory where the vsifax server
resides. These two directories may be on different servers, but there must be
a path defined so that 1) OSAS can drop command files into vsifax's "autosend"
directory with the details of the fax to be sent, and 2) so that vsifax can find
the pcl files associated with that fax in the rcfax directory and queue them.
FXPTH defines for OSAS where the autosend directory is for vsifax. On Unix/Linux,
this is usually something like /usr/vsifax3/ in windows, it is usually something
like c:\progra~1\vsi\faxser~1. The best way to determine whether you have the
right path is to escape to a carat within OSAS, then get to an operating system
prompt from there (!command.com for windows, !sh for unix), and try to cd to the
directory. If you get to the vsifax server directory and see "autosend" as
another directory one level down, you are there. You can then make sure you
are able to create a file in that directory by typing the command:
echo test > autosend\test (for windows)
echo test > autosend/test (unix/linux)
If this succeeds, you have the right path.

```
+------------------------------ RCTB ------------------------------------+
| Table ID FXPTH      Description DIRECTORY PATH FOR FAX SCRIPTS          |
| Number of Cols   1  Column Length  50      Type  A                     |
|                                                                        |
|--------------------------------------------------                      |
|/usr/vsifax3/                                                           |
|Directory for faxing software.                                         |
|Example: versafax: /usr/versafax/                                      |
|vsifax:/usr/vsifax3/                                                    |
|                                                                        |
|                                                                        |
|                                                                        |
+- Company 1 --------------------------------------------------- Verify -+
```

OSDRV: faxing (VSIFax only)

OSDRV is the other side of the equation from FXPFX. If both OSAS and VSIFAX are running on the same unix/linux server, nothing is needed here. Also, nothing is usually needed in a terminal server environment where OSAS and VSIFAX run on the same server. The OSDRV table is usually needed in a "windows" environment where VSIFAX runs on a different mapped drive server than OSAS. When communicating with VSIFAX, the faxing program will create a tag file including the path and filenames of the pcl files to fax. With nothing setup in the OSDRV table, the path will be the absolute path of your OSAS session, which can be found by looking at the "start-in" section of the properties of the OSAS icon in windows. Thinking from the perspective of vsifax running on the server, put in the OSDRV table whatever prefix is necessary to add to that path to get to the OSAS directory.

For example, if OSAS is running on the D: drive in a directory called \osas\progRM\ (from the server's perspective), putting D: in the table below will cause the vsifax tag files to contain filenames such as D:\osas\rcfax\xyz.pcl.

Note: In the situation where D: above is mapped not just to a drive, but a subdirectory on the drive, OSDRV must be adjusted accordingly. For example, if D: is mapped to server2\\program files\ the table entry would need to be: D:\PROGRA~1 so the tag file would have filename D:\PROGRA~1\osas\rcfax\xyz.pcl. As long as permissions were set correctly, VSIFAX would then be able to find that file and fax it.

BBj notes: for OSAS 7.x BBj, there are some differences with file openings, directories, etc. If the "base directory" in RM, System Setup, Directories is set to a relative path, leaving OSDRV blank will cause "../rcfax/" to be used in the tag file. This will not work. To provide vsifax with a good path, put the absolute path to your progRM directory in OSPTH. If OSPTH is set to "/u/osas652/progRM", the vsifax tag file will have "/u/osas652/progRM/../rcfax" which will work.

```
+------------------------------ RCTB ------------------------------------+
| Table ID OSDRV      Description DRIVE WHERE OPEN SYSTEMS RESIDES        |
| Number of Cols  1  Column Length  50      Type  A                      |
|                                                                        |
|-----------------------------------------------                         |
|D:                                                                      |
|enter the server drive letter where osas resides                        |
|so that vsifax will know where to find the fax                          |
|files.  If vsifax not used or if vsifax is on                           |
|the same drive as osas, you can leave this blank.                       |
|example:                                                                |
+- Company 1 -------------------------------------------------- Verify -+
```

```
HYLFX: faxing (hylafax only)



+--------------------------------- RCTB --------------------------------------+
| Table ID HYLFX      Description REMOTE HYLAFAX OPTIONS                       |
| Number of Cols   2  Column Length  35     Type  A                           |
|Parameter                              Value                                 |
|--------------------------------- -----------------------------------        |
|ftp hylafax server IP                  172.20.0.13                           |
|ftp user                               user123                               |
|ftp password                           pass234                               |
|fax pickup directory(complete path) /u/hylaftp                               |
|                                                                             |
|use ftp or mapped drive. if mapped  drive, leave ftp lines blank             |
|if hylafax on OSAS server, leave    all fields blank for direct call         |
|                                                                             |
+- Company 1 --------------------------------------------------- Verify -+
```

If Hylafax and OSAS reside on the same server, the fields in this table may be left
blank, and the hylafax "sendfax" command will be called directly from within OSAS.
Alternately, eForms can prepare the fax files needed by hylafax and copy them to a
predefined directory on the hylafax server. A shell script called hylafax.rcg is
provided which should be installed on the hylafax server and setup to run in the
background. This command to start the script can be placed in the
/etc/rc.d/rc.local file:
hylafax.rcg /u/hylaftp
The directory used here must match that in the HYLFX table, and must be created
ahead of time with wide-open (rwx) permissions. The hylafax.rcg script should be
placed in /usr/bin on the hylafax server and with 777 permissions as well.
Once the script is invoked, it will wait for the appearance of script files which
provide the details of the hylafax sendfax command for a given fax. eForms will
copy the necessary files either using ftp, if the first 3 lines of the table are
filled in, or a simple copy if only the fourth line contains information. The copy
option could be used in a mapped drive scenario, or if hylafax is on the same
server as OSAS.   If the copy fails for some reason, the fax will remain in the fax
outbox until the connection is reestablished, at which point the outbox faxes can
be retried.
The hylafax.rcg script can be found in the progRM directory after installing
eForms.

POPSV: email
This new table was added in 2/2003 when we encountered an SMTP server that required
logging into the POP server port before allowing SMTP traffic. If your SMTP server
is of that variety, put the username and password in this table and it will first
login to the POP server before attempting to communicate with the SMTP server. If
your server does not require this type of verification, do not put anything in this
table.

+--------------------------------- RCTB --------------------------------------+
| Table ID POPSV   Description POP VERIFICATION |
| Number of Cols   2 Column Length 38   Type A |
|USERNAME   PASSWORD |
|------------------------------------- --------------------------------------|
|ralph   33222aaabbb |
| |
+- Company 1 --- Verify -+

SMTPS: email

To be used only if mailcall is not an option for some reason.
Enter your SMTP server name or the ip number here to use for sending
internet email.

+--------------------------------- RCTB --------------------------------------+
| Table ID SMTPS   Description SMTP EMAIL SERVER |
| Number of Cols   1 Column Length 75   Type A |
SMTP SERVER NAME
```

```
|mailhost.yourdomain.com                                                      |
|                                                                             |
|                                                                             |
+- Company 1 -------------------------------------------------- Verify -+
```

SMTPV: email

To be used if mailcall is not an option for some reason.
If your SMTP server requires a username and password in order to send mail,
Put the username and password in this table and it will be supplied to the
server each time an email is sent. If your server requires no verification,
do not put anything in this table.

```
+------------------------------- RCTB ------------------------------------+
| Table ID SMTPV      Description SMTP VERIFICATION                        |
| Number of Cols   2  Column Length  38     Type  A                       |
|USERNAME                            PASSWORD                              |
|----------------------------------- -------------------------------------|
|ralph                               33222aaabbb                          |
|                                                                         |
+- Company 1 -------------------------------------------------- Verify -+
```

Troubleshooting

Troubleshooting internet email installation:

1) Did you add the "alias N0 tcp" line to config.bbx? (see TCPIP sockets above)
2) Is the machine where OSAS runs connected to the internet?
3) Can you ping the SMTP server from a dos/unix prompt on the machine where
   OSAS is running?
4) From an OSAS ready prompt, try running program RCCHSMTP.Do you get "success"
   response?
5) Are "alias PF" lines set up correctly in config.bbx?
6) Are your users set up in RCG Utilities, RCG Utilities User Setup screen? Do
   they all have valid internet email addresses (used for return address)?
7) Is your SMTP server setup to allow emails sent from the OSAS server's
   ip address?
8) If you are using UnForm, is your UNFEM table set up correctly?

Troubleshooting faxing:

1) Is vsifax installed?
2) Have you verified that vsifax will send a fax from the command-line
   testing mode?
3) Are the permissions open enough for OSAS to write to the vsifax server's
   autosend directory?
4) If OSAS goes through the motions of faxing with no errors, and no faxes
   go out, even though vsifax is proven to be installed and running, do the
   following:

Checking the VSIFAX autosend directory:

The RCG faxing module uses VSIfax's autosend functionality to queue up faxes
to be sent. When faxing is chosen from the OSAS prompt, a "tag" file is
created and placed in a directory called "autosend" which exists in the
vsifax server area. The autosend directory is created when vsifax is installed.
There is no need to create the directory. After OSAS places the tag file in the
directory, vsifax takes about 60 seconds to attempt to process it. If a tag
file disappears from the autosend directory, this means it has either been
queued, and it should show up in the vsifax outgoing log (command
/usr/vsifax3/bin/vsiolog) or it encountered an error. If an error is
encountered, vsifax will place both the failed tag file and a file with the
extension .err in the autosend/failed directory. If the source of the problem
is not obvious by looking at the contents of the .err file, feel free to email
both the .tag file and its corresponding .err file to rrw@rcgweb.com.

Optional Program Modifications

Some string tables that programmers can use to tweek eForms behavior:

STBL("RCFXTIME"): When faxing with vsifax or hylafax, this stbl can be set to delay the sending of a fax. Example: A$=STBL("RCFXTIME","21:00") will cause the fax to be queued up to be sent at 9PM. The hylafax interface accomplishes this by adding a "-a" option to the faxsend command (see hylafax documentation for details). The vsifax interface accomplishes it by adding a "stm = 21:00" line to the tag file (see vsifax doc for details). eForms uses this STBL, but does not clear it, so some care must be taken to clear it before other faxes need to be sent which are to to go out immediately. RCQEM.PUB is by called by default after the printing program returns to RMMENU. If this STBL is used, the print program should be modified to add a "CALL RCQEM.PUB" line after printing is complete and the print channel closed, and STBL("RCFXTIME") can be set before calling RCQEM.PUB and it should be cleared immediately after.

STBL("RCFAXPITCH"): by default, eForms without unform enhancement compresses the font of any document over 85 characters in width to a compressed courier font of pitch 17.00 and a bigger courier font for documents less than or equal to 85 characters wide (as defined in OUTCOLS when the document is printed). You can force a different font for any particular form or report by loading STBL("RCFAXPITCH") with the pitch you want. This will override STD or Compressed logic when faxing this particular form. It is reset after each fax is produced, so it needs to be set each time. This could be tricky when doing batch forms, so contact us if you need direction. Note, this works with VSIfax only, not other faxing options.

STBL("RCAUTOEM"):
(1,1)=form code:
- ➢ "!" will transmit to first email/fax found for that contact. First priority would be an email address in the standard OSAS file. If that is not found, the first contact found in the eForms Customer/Vendor/Employee Email/Fax Addresses will be used.
- ➢ Using <space> for the form code will send the email to each of that contact's recipients on file,
- ➢ Any other character will try to find recipients in the eForms Email/Fax database whose "Auto-print" code matches that character. If no eForms contact is found matching the form code, it will load the email address from the OSAS customer/vendor file if it exists. So if you use "I", in your ARPROI entry for example, it will automatically use the OSAS customer email, but you can override it by adding an email address with "I" in the eForms Customer Email/Fax Addresses.

(2,1)=Recipient File Source: "C","V", or "E" for customer, vendor, employee
(3,6)=Customer, vendor, or employee id
(9,50)=Subject line for email/fax

STBL("RCFORCE"): You can use this to override the defaults in the RC Tables and the eForms Email database for the following actions:
(1,1)="T"ext, "P"df, "H"tml for type of email attachment. You might set this if you have a certain form that always needs to go out as a .txt, for example.
(2,1)=Y/N for email return request
(3,1)=Y/N for fax header page

STBL("RCARCPFX"): If a given report is run several times a day, the naming convention of <File Prefix>_<date>_<time> might not be specific enough for some users. This STBL can be used as an additional identifier and can be set in the code just before the call to GENOUT.PUB. If a sales order post is being archived, for example, you could set this STBL to be the first batch id in the batch list, and the file created would have that batch id inserted after the file prefix: <File Prefix>_<batch>_<date>_<time>. Don't allow any spaces or special characters in this STBL or you may have unpredictable results.

STBL("RCFORCEARCFNM"): Introduced in rev 5.07, this STBL allows you to override the default archive filename altogether. If eForms archive finds this STBL loaded at the time of archive file creation, it will use this as the name of the file (suffixed with .pdf). Be careful not to include any spaces or special characters in this STBL or you may have unpredictable results. The proper time to load the STBL is immediately before the GENOUT.PUB call in your program. A sample program is provided which you can modify and call to prompt for a filename and load this STBL. The particular example in the program builds the filename based on a combination of Company ID, GL Period, and a description from a table. The program is provided "as-is" for your convenience as an example. It will require modification for each specific application. The STBL is cleared on returning to the menu program.

STBL("RC_OVERRIDE_ARCHCONTROL"): Introduced in rev 8.04. By default, archive control is setup by menu item and can be overridden in the user defaults. In some situations, though, it may be desirable for archiving to be conditional based on something that happens after entering the program from the menu. Use this to override the archive control for the menu temporarily. Valid settings are "N" for Never, "A" for Always, or "P" for Prompt. Set the STBL before calling GENOUT.PUB. It will be cleared each time before the return from GENOUT.PUB. For example, to force pick slips to archive "N"ever when the SO Transactions menu function is set to "A"lways, you can add this line to program SOPIK: 3019 A$=STBL("RC_OVERRIDE_ARCHCONTROL","N");REM RRW/RCG 041008

Modifications to automate online purchase orders & invoices

We have supplied some optional changes to the OSAS programs to automate online printing of PO's and Invoices. Our software will automatically send the email to either (the appropriate email contact from our database if available, or the default email address on file for the customer or vendor). Without these modifications you will have to manually enter the email address or look it up from the customer or vendor files.

If you are using the standard OSAS forms programs, we have included modified versions of these programs in \progAR and \progAP. You first need to rename the original programs to something like ARPROI.ORG, and then copy the RCG version ARPROI.RCG to ARPROI. You must do this for each program listed below.

The following lines of code can be added to your forms programs:

These mods apply to version 6.1x/6.5x.

ARPROI - PRINT ONLINE INVOICES
This mod causes automatic lookup of fax number or email address for the customer in TH2$. If "!C" is used as below, the first email/fax number found is used. This will be the one in the customer file if it exists. If quick mode is on, the invoice will fax immediately with no further interaction. If off, the fax number or email address will be looked up, and the user will be allowed to add cover page info, edit/change/append recipients, etc. before sending.
```
3017 LET A$=STBL("RCAUTOEM","!C"+TH2$+"Invoice # "+V1$)
3021 LET A$=STBL("!CLEAR","RCAUTOEM",ERR=3022)
```

ARPRI1 - Print BATCH and ONLINE Invoices:
this mod causes invoice to fax/email immediately after printing,
rather than waiting until return to the menu.
```
5228 LET PRINT_CHANNEL=0; CALL "RCQEM.PUB"
```

POPRP - Print Purchase Orders"
This mod causes automatic lookup of fax number or email address for the vendor in OH2$. If "!V" is used as below, the first email/fax number found is used. This will be the one in the vendor file if it exists. If quick mode is on, the P/O will fax immediately with no further interaction. If off, the fax number or email address will be looked up, and the user will be allowed to add cover page info, edit/change/append recipients, etc. before sending.
```
3801 LET A$=STBL("RCAUTOEM","!V"+OH2$+"P/O # "+OH0$(7,8))
3816 LET A$=STBL("!CLEAR","RCAUTOEM",ERR=3817); REM RRW/RCG
```

POPRP1 - PRINT PO'S - PLAIN PAPER, STD, COMPRESSED"
this mod causes P/O to fax/email immediately after printing, rather than waiting until return to the menu.
```
5509 CALL "RCQEM.PUB"; IF GUI THEN LET O7=10,X9$="Reprint Purchase Order?";
5509:GOSUB GENERROR; IF Y$="E" THEN LET X$="YES" ELSE LET X$="NO " FI;
5509:LET Y$=""; GOTO 5535
```

POPRP2 - Print Purchase Order Forms - 8.5 x 11"
this mod causes P/O to fax/email immediately after printing, rather than waiting until return to the menu.
```
5509 CALL "RCQEM.PUB"; IF GUI THEN LET O7=10,X9$="Reprint Purchase Order?";
5509:GOSUB GENERROR; IF Y$="E" THEN LET X$="YES" ELSE LET X$="NO " FI;
5509:LET Y$=""; GOTO 5535
```

Appendix B
Modifying Batch Forms Programs
For Email/Fax Routing

Note: many of the standard OSAS Forms have been modified for you to enable batch routing. Please see the section entitled "Batch Forms" to determine whether you need further customization.

RCG Utilities: Forms Transmission Toolkit

Versions 5.2 and higher: forms with multiple form logic using FORM_TYPE$ and calling GENFPRNT.PUB to do multiple copies after printing batch to a file.

Programs included, all of which should be put in progRM:
GENFPRNT.PUB
RCXMIT.PUB
RCPXLG, RCPXLG1
RCDLXL

1) RM, System File Maintenance, Form Codes.
To transmit one copy of the form, add a copy with first 4 characters of Copy Name="*RC ".
You can add a separate menu option for Transmitting as opposed to just Printing the form, by creating a new Form Type and a new Menu selection with a special Param value. Then change the FORM_TYPE$ in the Pick Screen program to your new one when X0$ equals the special Param value for that menu selection.

2) In addition, in the pick screen program, add a line to set the RC string table for outcols, which is used to determine email and fax fonts: e.g. A$=STBL("RC_OUTCOLS","132"). Don't worry about resetting it, as long as you set it in the pick screen of each form you are to transmit. This is not needed if the forms will be going through UnForm.

3) Since the GENFPRNT.PUB multiple copy logic doesn't kick in when (F)ile is chosen as output device; for transmit you should probably change DEVICE$="PF" to DEVICE$="P". Otherwise, when the user chooses file, no transmit will occur, just a plain-jane printing to a file with no copy names, etc.

4) In batch print program, after each new contact (vendor, customer, etc) is read and just before their form is to be printed, print the following line of text to the printer channel:

    (1,5)="^^RCX"

    (6,1)=form code: "!" will transmit to first email/fax number found for that contact (in 6.11 this will be the one in the customer/vendor/employee file if there is one), blank will send a copy of the form to all of that contact's recipients on file, and any other character will send only to those recipients in the Contacts database whose "Auto-print" code matches that character. The auto-print code allows setting up of special recipients when there are multiple recipients for each contact. To use this feature, the recipients must be set up in the RCG Utilities Email Address or Fax Number screens with an auto-print code, even if this is redundant.

    (7,1)=Recipient File Source: "C","V", or "E" for customer, vendor, employee

    (8,6)=Customer, vendor, or employee id

    (14,50)=Subject line for email/fax

    (64,1)=Force Form Type: if desired, "T"ext, "P"df, or "H"tml in email body may be forced here; otherwise, just leave blank and the recipient's default value will be used.

    (65,1)=Return Request Email Y/N: force this here if desired, otherwise blank

    (66,1)=Fax Cover Page Y/N: force this here...almost always to "N"; if "Y", there will be no message text, but a cover including subject line will be sent.

5) RCXMIT.PUB will write an entry to the Forms Transmission Log file: RCXLGx each time a form is transmitted by either fax or email. The Log report is printed using the program RCPXLG, which you should add to the appropriate menu. A purge program called RCDLXL is also included, which can be added to the RC MAIN menu. It allows purging by user id and date.

Example:
An example of the use of the toolkit for transmitting batch P/O's follows:

1) RM/System File Maintenance/Form Codes

```
*------------------------------ Form Codes -------------------------------*
|    Company ID  Form Type    Form Name            Number of Copies        |
|                                                                          |
|               POXFER       Purchase Order Forms        2                 |
|                                                                          |
*--------------------------------------------------------------------------*
|    Copy Number   Copy Name                  Prompt to Mount Forms        |
|                                                                          |
|       1          *RC Vendor Copy                   NO                    |
|       2          File Copy                         NO                    |
|                                                                          |
|                                                                          |
|    Do you want to print alignment mark before printing? NO              |
|                                                                          |
|                                                                          |
*--------------------------------------------------------------------------*
|                                                                          |
*- Company H ------------------------------------------------- Verify -*
```

2) Program Changes:

POPRP:
0111 IF X0$="T" THEN LET FORM_TYPE$="POXFER"; REM "RRW/RCG"

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```
3811 IF X0$="T" THEN LET DEVICE$="P"; LET A$=STBL("RC_OUTCOLS",STR(ABS(OUTCOLS)));
REM "RRW
3811:/RCG"


POPRP1:
3021 LET EMSUBJ$=FILL(50),EMSUBJ$(1)="Purchase Order "+OR0$(7,8); REM RRW/RCG
3022 IF X0$="T" THEN PRINT (F)"^^RCX"+"!"+"V"+OR2$+EMSUBJ$+"PNN"; REM RRW/RCG

3) Menu: Line 03 added for Transmit Orders
*------------------------------ Menus -----------------------------------*
|                                                                         |
| Application PO   Menu P009   Title Transaction Reports                   |
*-------------------------------------------------------------------------*
|    Line   Description                          Type  Program      Param  |
|                                                                         |
|     01    Purchase Requisitions Report           3   POPRREQ            |
|     02    Print Orders                           3   POPRP              |
|     03    Transmit Orders (email/fax)            3   POPRP        T      |
|     04    Open Order Report                      3   POPRO              |
|                                                                         |
|     05    Scheduled Delivery Report/Worksheet    3   POPRD              |
|     06    Purchases Journal                      3   POPRJ        A      |
|     07    Returns Journal                        3   POPRJ        B      |
|     08    Daily Sales Tax Report                 3   POTAX              |
|     09    Receipts and Invoices Report           3   POPRR              |
|     10    Accrual Verification Report            3   POPRA              |
|     11    Goods Not Received Report              3   POPNR              |
|     12    Post Transactions                      3   POPST              |
|     13                                                                  |
|     14                                                                  |
|     15                                                                  |
*-------------------------------------------------------------------------*
|                                                                         |
*- Company H -------------------------------------------------- Verify -*
```

The above example assumes that you want to print at least one copy of the form.
In order to transmit only, without printing a copy, RCXMIT.PUB can be called
directly from the forms program instead of using GENFPRNT.PUB. In the batch
invoice example below, lines 1081,1082 would be inserted just before each
customer's invoice (or if sorted by customer you could do it at the customer change
so a bunch of invoices would go in one fax transmission or email). The RCXMIT
subroutine illustrates the setting up of the parameters passed to/from RCXMIT.PUB.
RCXMIT.PUB will determine the print channel for that particular customer based on
whether they have an entry with form code "I".

```
1081 IF TRANSMIT THEN IF PRINTERF<>F AND PRINTERF<>0 THEN CLOSE (F); CALL "RCQ
1081:EM.PUB"; LET F=PRINTERF; REM SEND OUT ANY PREVIOUSLY QUEUED
1082 IF TRANSMIT THEN GOSUB RCXMIT; REM CHECK AND RESET F IF NECESSARY FOR FAX
1082:/EMAIL
20000 RCXMIT:
20001 LET XMITCODE$="I"
20005 DIM XMIT$(66)
20010 LET XMIT$(1,5)="^^RCX"
20015 LET XMIT$(6,1)=XMITCODE$; rem form code
20020 LET XMIT$(7,1)="C";rem customer/vendor/employee
20025 LET XMIT$(8,6)=HEAD.CUST$
20027 LET SUBJ$=HEAD.CUST$+"/"+HEAD.INV$+":Invoice From Response Computer"
20030 LET XMIT$(14,50)=SUBJ$
20035 LET XMIT$(64,1)="P"; REM force form type: (P)df, (T)ext, (H)tml
20040 LET XMIT$(65,1)=" "; REM force return request
20045 LET XMIT$(66,1)="N"; REM force fax cover page
20048 LET LOGFORM$="INVOICE";rem label for transmit forms log
20050 CALL "RCXMIT.PUB",PRINTERF,F,XMIT$,RCTB,RCEADR,RCFNUM,RCSCR,RCXLG,LOGFOR
20050:M$,OSGUI$; REM RRW/RCG ADDED OSGUI$ 072704
20099 RETURN
```

Special Batch Archive Splitting: Normally, eForms will save each print job as one archive
file. When you select the printer, everything that prints will be mirrored in the archive file.

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eForms also includes special batch archive splitting capability for A/R Invoices and A/R Statements. This functionality is only available with a license for "eForms Complete". It will not work with "eForms Lite." When archiving is turned on for these specially modified programs, instead of archiving an entire invoice run to one file, eForms archives each individual invoice or statement separately in a subfolder named <customerID_customername>.   This functionality can be duplicated for your custom batch forms as well. Since the eForms batch forms programs also handle the routing of batch forms, the archiving is accomplished by a preprint of the invoices to archive, separating them at the customer break. For examples of this, see programs ARPRI.RCB, ARPRI1.RCA, and ARPRI1.RCB. These can be compared to the standard OSAS programs ARPRI and ARPRI1. ARPRI.RCB checks to see whether archiving is turned on, and if so, runs ARPRI1.RCA first to do the archiving, before running ARPRI1.RCB to do the batch routing. Feel free to contact Randy Wilson at rrw@rcgweb.com for any questions you may have about implementing this functionality for your custom programs. RCG can also modify your programs for you if you desire.

Appendix C
Frequently Asked Questions

I have the zip file downloaded from the web site, now what?

The rcxxx.zip file that you downloaded installs in the same manner as the periodic updates from Open Systems. Before installing, backup your progRM and sysfil directories. Use an "unzip" utility to unzip the file into a directory, change the install directory in RM, System File Maintenance, Directories, and then Goto RM, Install Applications. Once the application is installed successfully, execute Create Data Files for each company for Application "RC". *Important:* When creating RC files, you will be prompted: "RM files already exist, overwrite them?" Be sure to respond **"NO"** to this question. You do not want to overwrite any existing data files. The last step is to put your RCUNLOCK file in place. This will be either the copy of RCUNLOCK that was automatically emailed to during the download process (which will de-activate automatically after 30 days) or the copy that was emailed to you from RCG after processing your payment (which will activate the features you purchased for your OSAS serial number only). To "uninstall" eForms, copy back the progRM and sysfil directories that you preserved before installing. Also, any standard OSAS programs that are modified by eForms are preserved in the rcsave folder before overwriting.

How do I send Internet Email from OSAS?

1) **Quick Message**: The "**Quick Internet Email**" function on the F4-Other Commands Menu allows you to key in a subject and up to fifteen 75-character lines. You can attach as many files as you want, and send the message to one or multiple recipients. Your recipients can be selected from your customers, vendors, or employees. If you've setup email groups, you can select an entire group at once. You can also choose whether you want all the recipients to receive a list of the other recipients of the message or not. This same "quick message" format is available on the RCG Utilities/Internet Email Menu/New Internet Email Message.

2) **Anything you can print to a file, you can email**: You will notice that whenever selecting a printer for a report, a new option "**e(M)ail**" is available. If "M" is selected, the user is prompted for the subject, message text lines, attachments, and recipients, just as in the "quick message" mode. When the report is printed, instead of going to the printer, it is redirected to a file, which is then sent to via email to the selected recipients. When selecting recipients, the choice is given for "OSAS Report Format." "T" will cause the OSAS report to be sent as a plain text attachment to the email. "H" will convert the report to simple HTML and put it in the body of the email. If Unform or enscript/ghostscript are installed, "P" will convert the report to a PDF document , which will be attached to the email. The recipient can use the Adobe PDF reader (available for free download at www.adobe.com) to view the formatted version of the report, invoice, statement, etc.

3) **Resend Message**: Once an email message is sent, it is stored in the "Sent Items" of the sender until they expressly delete it using the F3-delete key. To resend a message or OSAS report, locate it within the Sent Items, hit Enter to and a new copy of the message is created for sending. Any part of the message can be

modified except the OSAS report which is behind the scenes. Recipients, Attachments, Subject and text message can all be modified before resending.

How do I send a Fax from OSAS?

1) **Quick Message**: The "**Quick Fax"** function on the F4-Other Commands Menu allows you to key in a subject and up to fifteen 75-character lines. You can attach as many files as you want, and send the message to one or multiple recipients. Your recipients can be selected from your customers, vendors, or employees. If you've setup fax groups, you can select an entire group at once. You can also choose whether you want all the recipients to receive a list of the other recipients of the message or not. This same "quick message" format is available on the RCG Utilities/Faxing/New Fax Message.

2) **Anything you can print to a file, you can fax**: You will notice that whenever selecting a printer for a report, a new option "**fa(X)**" is available. If "X" is selected, the user is prompted for the subject, message text lines, attachments, and recipients, just as in the "quick message" mode. When the report is printed, instead of going to the printer, it is redirected to a file, which is then passed to the fax server which faxes it to the selected recipients.

3) **Resend Message**: Once a fax message is sent, it is stored in the "Sent Faxes" of the sender until they expressly delete it using the F3-delete key. To resend a message or OSAS report, locate it within the Sent Faxes, hit Enter to and a new copy of the message is created for sending. Any part of the message can be modified except the OSAS report which is behind the scenes. Recipients, Attachments, Subject and text message can all be modified before resending.

The "Quick Internet Email" function is okay, but I want to send fancy-looking emails. How can I do that?

A couple of ways are possible. First, you can attach any file you want to the internet email. Word documents, Excel Spreadsheets, PDF Files, TIFF, JPEG, HTML, etc. The recipient will receive such file attachments intact, and can view them with whatever software is required. For unix/linux environments, the attachment files must be placed in the "rcattach" folder under the OSAS application directory. The append mode of the "attachment" window will allow an F2-inquiry into this folder, allowing easy selection of these files. In a windows environment, the windows browse function can be used to select attachment files.

But I don't want to send attachments because my recipients may be afraid to open them, thinking they might contain viruses, etc. Is there any way to get a "pretty" message in the body of the email?

There is a trick available to send a pretty HTML file as the body of the email message. If the first attachment is a file with extension .HTM or .HTML, the software will replace the email body with the HTML formatted data from that file. Other attachments will be attached normally. Use an HTML editing program to create your file with pictures, logos, fancy fonts, etc. Then attach that file as the first attachment, and it will appear in the body of the email. Recipients who are equipped to view HTML email will see your formatted message. Other attachments will be attached normally.

How do I send a "blast" message to everyone in my customer database?

1) create an email group (pages 4-8) or a fax group (pages 21-25)
2) If you want to include an attachment, create the attachment and copy it to the rcattach directory which is in your OSAS directory (pages 10,26-27)
3) Create a new email message or new fax message and enter yourself as the only recipient, so you can verify that the result is what you want (pages 9-13,26-30). Select the attachment you defined in step 2 (pages 10, 26-27).
4) Once you're happy with the result, resend the message. You can do this by redoing step 3 and entering your group id in your recipient list. You could also go into your Sent Items screen, select the message you just sent, Select **R**ecipients and add the group you defined in step 1.

I've got my UnForm rules file all finished and the printed copies look great. But I want to set up multiple copies using the Form Codes in Open Systems. When I change from 1 copy to 2 or more, suddenly my printed copies are double-spaced and the rules seem to be no longer applying. What happened?

To do the multiple copy logic, OSAS first uses the "PF" alias to print to a file, and then prints from that file to the printer multiple times. If the "PF" is setup incorrectly in config.bbx, this can cause you problems, only when OSAS copies is greater than one. If you are getting double spacing, take out the "LF=0D0A". If you are experiencing this with only specific terminal ID's , the "PF" is probably setup differently for each terminal ID. Find the one that doesn't work and make it match one that does.

When trying to email or fax a document, a pro5 error 16 occurs.

eForms is a file channel hog, and combined with OSAS files already open, you may be hitting the upper limit (especially in Sales Order Transactions) Check the config.bbx and make sure that fcbs, cibs, and handles are set to at least 200.

Sometimes I want to send out a quick fax or email without leaving the screen I'm currently in. It's a pain to have to go to the RCG utilities menu every time. Is there a quicker way?

Use the "other commands" menu. In character mode, hit <F4> twice. In gui mode, click "Other". You can send either a quick email or fax from here, and when you're done, the screen will return you to where you left off.

I'm emailing/faxing plain-paper forms without UnForm. The underlines are missing. Am I doing something wrong?

eForms sends plain-paper emails and faxes by first printing the form to a file, and then emailing/faxing the resulting file. The underline mnemonics used by Open Systems in their plain-paper forms disappear when the form is printed to a file. Two possible solutions: 1) replace the underlines mnemonics (begin/end underline) in the OSAS programs with dashes or actual underline characters, or 2) use UnForm to create more professional-looking forms.

I'm using the HTML option for email (or efax.com) to send a plain-paper invoice. Some of the heading lines are not lined up correctly. What is wrong here?

OSAS standard plain-paper forms put the characters "<<" and ">>" around the document title. These characters mean something special in HTML language, causing everything to get shoved to the left. To correct the problem, modify the OSAS print program and change these to some other characters like "<" and ">" or just get rid of them altogether.

When sending emails, a bunch of black boxes keep popping up and then going away.

Check the RC Table EMLOGxxx. If this table is test to YES, the email program appends text to a log file containing all the SMTP commands and responses for troubleshooting purposes. When this is turned on in a windows environment, though, the commands used for logging pop up those black boxes. Change the EMLOGxxx table to NO, once the email troubleshooting is complete.

When archiving, I get a message indicating that there is a problem with columns settings and that I should check the config.bbx file. What's that all about?

eForms archiving works by first sending output to a text file, then sending the file both to the printer you have selected and to the archive document. The alias in the config.bbx file called "PF" is used to create the text file. The SPCOLS and CPCOLS settings for the PF alias must be at least as large as those for the printer in question, or OSAS will return an error when attempting to print. As a rule, set your printer SPCOLS=80 and CPCOLS=132. SPCOLS and CPCOLS for PF can both be a high number like 160.

Whenever I send an email or fax, Open Systems shuts down completely.

There is a problem with your eForms license file. Contact Randy Wilson at rrw@rcgweb.com for support.

Sometimes when sending email in gui mode, I don't see the email window appear to report on the status of the email as it goes out. The email seems to be sent, but there is no indication of it.

eForms has probably run into a resource limitation involving the DEVS= that is setup in the config.bbx. The default for DEVS= is 4, but this is sometimes not enough for eForms to display it's email status window. This doesn't prevent emails from going out, but does make it difficult to know what is going on. Increase it to DEVS=10, restart OSAS and the status window should begin to appear normally. See instructions regarding config.bbx in appendix A of this document.

I have followed the instructions regarding table setup, but eForms seems to be ignoring the settings.

Be sure that the data you entered is not in the heading area of the table (above the dashed line). eForms will only use data entered below the dashed line. Also, keep in mind that the tables can be company specific. If you change the SMSPS table, for example, and you are working in company 1, be sure there isn't another table named SMTPS1.

I just added a new eForms user, and now eForms won't work at all.

This is a licensing issue. If the eForms license is set for a limited number of users, it will cease to function. For an immediate remedy, remove users form eForms User setup until functionality returns. To add users, contact Randy Wilson at rrw@rcgweb.com.

I want to start routing invoices and statements to my customers. We have many email addresses and fax numbers on file in the regular OSAS database and we don't want to rekey them. Is there an easy way to get these into the Customer Email Addresses/Customer Fax Numbers database so we can begin routing forms?

Yes. There is a trick to importing contacts from your OSAS database into your eForms contacts database. (Note: this only works in text mode, so if you are a gui user, turn gui mode off first.) Do the following:

```
eForms/Internet Email/Email groups
Enter group id *RCIMPORT.  This will not create a new group, but will
allow you to import your contacts into customer email addresses.
Leave description blank and hit enter.
Select i(M)port.
Answer YES to "Exclude contacts without email address on file?"
For your import table, choose WIZARCU1 to add customer contacts. (You
could also choose WIZAPVE1 for vendor comments, or WIZPAEG1 for
employees).
Enter the Form Type you want to load.  For invoices, this would be "I";
for statements, "S", etc. A selection screen will then display with
from/thru for some of the customer fields.  If you want all customers to
be loaded, leave all selections blank.  You can selectively choose a group
of customers by filling in the from/thru values.  When you hit page-down,
eForms will load those customers with email addresses into Customer Email
addresses with the form type you indicated.
```

When I attempt to email a report using the Report Format "H" for HTML in body of the email, I sometimes experience and error 31 and the email fails.

Error 31 is a memory error. The size of the HTML message you can send is restricted by the memory with which you invoke Open Systems. This can be increased by modified on the pro5/vpro5/bbj command line where the –m is used. A larger –m will allow a larger HTML email. It is advisable to avoid the H option for very large reports, though. Use T for a text file attachment or P for PDF instead.

Postings from eForms Forum

Here are the entries to the eForms Forum that I've been posting since 8/2005. Remember that the various code changes indicated here are regularly rolled into later versions of the product. If you have an eForms dated later than an indicated change, it is probably already in your code. The preferred method of obtaining updates is by maintaining a Continuous Enhancement Subscription (CES) with Response Computer Group for your eForms software. If you are current on the CES program, you are entitled to free updates which will be delivered upon request to rrw@rcgweb.com.

Posted: Tue Aug 23, 2005 8:54 pm   Post subject: Problems with eForms install with OSAS Client Server

There have been some error reports lately involving OSAS Client/Server where the RCLAST program in the install is trying to create some files and receives an error. The RCLAST program is the last program to run during the install. It's job is to create/update several files, namely: RCWIND,RCDF,RCTB, and OSFRM. It attempts to add to the file if it is already there, or create it otherwise. If this fails, and you are performing a re-install, you should need to take no action. If this is an initial install, you can copy the following files manually from the installable media (you'll have to dig into the zip file).

install/RCSYSFIL.ZIP/SYSFIL/RCWIND.MRG --> sysfil/RCWIND
install/RCPROGRM.ZIP/PROGRM/RCDF.MRG --> progRM/RCDF
install/RCPROGRM.ZIP/PROGRM/RCTB.MRG --> progRM/RCTB

I will try to get this fixed in a future release.

Posted: Tue Oct 11, 2005 2:07 pm   Post subject: Remove "1" for local 10-digit fax dialing

eForms faxing automatically adds a "1" to the front of any 10-digit fax number before sending that number to the fax server (hylafax or vsifax). Both hylafax and vsifax have dialing rules which allow the removal of the "1" from the number for whichever area codes are considered "local" and don't allow the "1". Today I was asked to make that work in hylafax, and was unsuccessful, due to lack of knowledge on my part and inability to find good documentation on the subject. After several requests, I've decided to add a table to eForms which would allow the addition of area codes for which the "1" should be dropped. I will try to get that into a future release soon. In the meantime, the following mods can be made to RCFXSND.PUB to hardcode those area codes into the program:

Code:

```
LOAD"RCFXSND.PUB"

0091 LET NO_ONE$=""; REM ADD 3 DIGIT AREA CODES FOR NO ONES HERE RRW/RCG
1186 IF LEN(FAXNUM$)=10 AND POS(FAXNUM$(1,3)=NO_ONE$,3)=0 THEN LET FAXNUM$="1"
1186:+FAXNUM$; REM RRW/RCG 101105
20721 IF LEN(FAXNUM$)=10 AND POS(FAXNUM$(1,3)=NO_ONE$,3)=0 THEN LET FAXNUM$="1
20721:"+FAXNUM$; REM RRW/RCG 101105

SAVE
```

After these lines are added, the program will look for a variable called NO_ONE$ which will contain 3-character area codes which are to be considered local. To set up the area codes for your particular installation, enter line 91 setting the area codes you want. For example, to add area codes "305" and "786" enter the following

Code:

```
LOAD"RCFXSND.PUB"

0091 LET NO_ONE$="305786"

SAVE
```

Posted: Tue Oct 11, 2005 12:51 pm   Post subject: rev 5.07 bug fix for remote hylafax server

The hylafax.rcg script that runs on the linux box will continue to run until the process is "killed". This could be problematic if it is started as root (at bootup), because only root can kill it. This alternate version will continue to run as long as the directory it is checking is still there. So if the command is started as:
/usr/bin/hylafax.rcg /u/hylaftp
It will only run if /u/hylaftp exists and if /u/hylaftp is removed or renamed, it will automatically quit. This will provide a method for stopping the script if necessary; just do this:
mv /u/hylaftp /u/hylaftp.sav

Here is the revised script:

Code:

```
hyladir=$1
while [ -d $hyladir ]; do
        cd $hyladir
        for i in *.hfcmd;do
                if [ "$i" != "*.hfcmd" ] ;then
                        echo $i >> $hyladir/foundfax.log
                        chmod 777 $i
                        ./$i >>$hyladir/foundfax.log 2>>$hyladir/foundfax.log
                fi
        sleep 10
        done
done
```

Posted: Wed Jan 18, 2006 5:18 pm   Post subject: vsifax on unix, OSAS eForms on windows client

In an OSAS client-server situation where OSAS is running on a windows client and VSIfax is on a unix/linux server, eForms gets confused about what kind of slash characters to use.

If eForms is using the wrong slashes, the tag file in the vsifax autosend folder won't direct vsifax to find the files correctly. To remedy, this, you can modify the program RCFXSND.VSI with the following lines:

Code:

```
0052 LET FORCE VSI UNIX=1
200371 IF FORCE_VSI_UNIX FOR I=1 TO LEN(F$);IF F$(I,1)="\" THEN LET F$(I,1)="/" FI;NEXT I
20379 IF FORCE_VSI_UNIX THEN FOR I=1 TO LEN(VSI$); IF VSI$(I,1)="\" THEN LET VSI$(I,1)="/" FI; NEXT I
```

I'm hoping to make this table-driven in an upcoming release.

Posted: Thu Jan 19, 2006 9:18 am   Post subject: Problem with blast email/fax to group of customers/vendors

There is a problem with sending an email/fax to a group, where the group consists of a list of customer/vendor id's. The desired functionality is that the customer/vendor id will be replaced with all the contacts on file for that customer/vendor at the time of emailing/faxing. One of our

VARs found that only the first customer/vendor in the list is being sent. Here is the bug fix for this, in program RCEXPAND.PUB:

Code:

```
1620 LET RCEADR2.DESC$=FILL(51); IF FAXING THEN LET RCEADR2.DESC$(2)=FAXNUM$ E
1620:LSE LET RCEADR2.DESC$(2)=EMAIL$ FI; LET RCEADR3.RETREQ$="N",RCEADR2.HTML$
1620:=RPTTXT$,RCEADR2.CNAME$=CNAME$,RCEADR2.ATTN$=ATTN$; GOTO EXPANDLOWER; REM
1620: 1360 011706; REM 121003 1350; REM "IF 6.1 FILE HAS FAX/EMAIL ADD IT AS A
1620:NOTHER ENTRY"
```

Posted: Fri Feb 17, 2006 4:50 pm   Post subject: hylafax accepts pdf files: this resolves problem with gs/courier

We've been working too hard on this eforms+unform+hylafax problem.

We don't need ghostscript to create ps files for hylafax…hylafax accepts pdf's without conversion and faxes them just fine (who would have thought?).

So this eliminates the problem. I've changed the code to skip the ghostscript step if unform is being used.

Please ignore the mods that I mentioned in yesterday's posts. Everything works as we would have hoped when we just use unform to create pdfs and tell hylafax to fax them. Without unform, eForms will still do the same stuff it's always done (enscript text to .ps).

I've put some patches and full updated installables for 6.5 and 7.0 at:

http://www.rcgweb.com/public_download/eforms_patches/

rchyl.b47.patch.zip is for all OSAS versions prior to 7 and unzips into progRM.

rchyl.701.patch.zip is for OSAS 7.0 and unzips into progRC

Contact me if you need installables for previous versions.

Thanks to Larry Hiscock who clued me in on the bbx list

Posted: Tue Feb 21, 2006 11:16 am   Post subject: Error 16 when routing forms to fax

Bug fix related to error 16 when routing forms (invoices, statements, etc) to fax. A channel is being opened for each fax and not closed afterward. Please add this line of code to fix the problem (same for all versions, revisions):

Code:

```
>LOAD"RCQFX.PUB"
>9014 IF RCDF THEN CLOSE (RCDF,ERR=9015); REM RRW/RCG 022106
>SAVE
```

Posted: Tue Feb 21, 2006 1:56 pm   Post subject: Automatically attach document to outgoing emails

I received a request today for the ability to attach a document automatically emails going out.

Here is some code that will check for an STBL, and automatically load that as the first attachment when sending out emails or faxes. For emails, use STBL("RCFORCEATTACH"), for faxes, use STBL("RCFORCEATTACH_FAX").

Add these lines to RCEMHDR.PUB

Code:

```
3361 GOSUB AUTOATTACH; REM 121106
3961 GOSUB AUTOATTACH; GOTO 3970
23100 AUTOATTACH:
23101 IF DID_AUTO_ATTACH THEN GOTO 23199
23105 IF EMFAX$="F" THEN LET A$=STBL("RCFORCEATTACH_FAX",ERR=23199) ELSE LET A
23105:$=STBL("RCFORCEATTACH",ERR=23199); REM 022106
23110 IF CVS(A$,3)="" THEN GOTO 23199
23115 DIM RCEMDE$:FATTR(RCEMDE$); LET RCEMDE.KY$=KY$,RCEMDE.SEQ$="01",RCEMDE.R
23115:EF$="EMA",RCEMDE.DESC$=FILL(70),RCEMDE.DESC$(1)=A$; LET RCEMDE$=FIELD(RC
23115:EMDE$); WRITE RECORD(FILE[RCEMDE])RCEMDE$; REM 022106
23199 LET DID_AUTO_ATTACH=1; RETURN
```

Be careful, though, that your attachment is handled by your fax software. Hylafax handles text, postscript and pdf quite nicely. VSIfax handles different formats in Windows, but just pcl in unix/linux.

Posted: Fri Mar 10, 2006 4:22 pm   Post subject: Archiving forms printed online

Printing of online forms presents some problems for archiving because the programs often do not return to the menu after printing. This is similar to the problem with email/fax where the transmission does not go out until the Order Entry program is exited. But worse with archiving, because output can actually get lost. To archive a form printed "online" (Purchase Order, Invoice, etc.) a modification must be made to the print program to force the archive/print after each document is completed (this normally happens at the return to the menu, or the next time a printer is selected). Here is an example of some modifications to POPRP2 to accomplish this:

Code:

```
5500 REM 5500,5 "END OF FILE ROUTINE"
5505 LET N4$="NO "; REM "Alignment flag default"
5506 IF COPIES>1 THEN CALL "GENFPRNT.PUB",COPIES,FORM_TYPE$,PRINT_DEVICE$,PRIN
5506:T_CHANNEL,DEVICE$,F,OSGUI$
5507 CLOSE (F,ERR=5508)
5508 CLOSE (PRINT_CHANNEL,ERR=5509)
5509 IF DEVICE$="M" OR DEVICE$="X" THEN CALL "RCQEM.PUB"; GOTO 5516; REM SMM T
5509:BC RCG
5510 LET A$=STBL("RCPRINTCHANNEL",ERR=5513); REM SMM TBC RCG
5511 LET RCF=NUM(A$,ERR=5513); PRINT (RCF,ERR=5512)" "; REM SMM TBC RCG
5512 CLOSE (RCF,ERR=5513); REM SMM TBC RCG
5513 CALL "RCFPRNT.PUB"; REM SMM TBC RCG
5516 IF GUI THEN LET O7=10,X9$="Reprint Purchase Order?"; GOSUB GENERROR; IF Y$="E" THEN LET
5516: X$="YES" ELSE LET X$="NO " FI; LET Y$=""; GOTO 5535; REM ( SMM) RCG (R) WAS 5510
5518 LET X8$="Reprint Purchase Order?"; IF R0>4 AND R0<6 THEN LET X8$="Reprint
5518: Debit Memo?"; REM SMM TBC (R) WAS 5510
5519 GOSUB GENERROR; REM SMM TBC (R) WAS 5515
```

Thanks to Scott Mitchell for being the first to implement and test this.

Posted: Fri Mar 10, 2006 5:02 pm   Post subject: Routed History Invoices problem with multiple page invoices

eForms, Batch Forms, History Invoices is the modified version of History Invoices that includes forms routing so that you can print a whole batch and have them routed to email/fax/print. This was not working for invoices that were more than one page. Download the fixed ARPRHIN1.RCB program from our website at in hist_invc_fix.zip at:

http://www.rcgweb.com/public_download/eforms_patches/

For OSAS 7, put this in progRC, otherwise, it goes in progRM.

Posted: Mon Mar 13, 2006 9:17 am   Post subject: Archiving causing no form-feed on non-laser printers

When a report/form is selected in eForms Archive Control screen, eForms prints the report to a file, sends the file to the archive and finally prints it to the printer that was selected. We recently found that with some printer configurations the last form feed for the job was omitted, so that the next report would start in the middle of the page.

These code changes may be pasted into eForms for **OSAS versions 6.5 and PRIOR.** Fixes are also available for OSAS 7. Please email me at rrw@rcgweb.com and request a fresh installable zip file which can be installed as a "patch" over the existing code.

GENOUT.PUB

Code:

```
9017 LET CHANNEL=F; LET A$=STBL("RCPRINTCHANNEL",STR(F)); REM RRW/RCG RC ARCHI
9017:VE 011805
20212 LET A$=STBL("!CLEAR","RCPRINTCHANNEL",ERR=20213); REM RRW/RCG RC ARCHIVE
20212: 011806
20353 LET A$=STBL("!CLEAR","RCPRINTCHANNEL",ERR=20354); REM RRW/RCG RCARCHIVE0
20353:11806
```

GENGUOUT.PUB
Code:

```
20212 LET A$=STBL("!CLEAR","RCPRINTCHANNEL",ERR=20213); REM RRW/RCG RC ARCHIVE
20212: 011806
20353 LET A$=STBL("!CLEAR","RCPRINTCHANNEL",ERR=20354); REM RRW/RCG ARCHIVE 01
20353:1806
29016 LET CHANNEL=F; LET A$=STBL("RCPRINTCHANNEL",STR(F)); REM RRW/RCG RC ARCH
29016:IVE 011805
```

Posted: Tue Mar 14, 2006 4:59 pm   Post subject: hylafax in strange state, not warning that fax failed

Sometimes hylafax gets in a state where sendfax does not respond at all and the faxes do not get queued. In this situation, sendfax does not give back the standard message to standard output telling what it did. The following change should cause eForms to give a warning when it gets no answer back from hylafax.

RCFXSND.HYL

Code:

```
20359 REM IF POS("NIX"=INFO(0,0)) THEN LET HYLACMD$=HYLACMD$+">/dev/null 2>/de
20359:v/null"; REM 102604
20360 REM LET A=SCALL(HYLACMD$)
20370 LET CHAN=UNT; OPEN (CHAN)"<"+HYLACMD$
20371 READ (CHAN,ERR=20375)HPROC$
20372 PRINT @(2),HPROC$
20373 GOTO 20376
20375 LET SENDERR=1; LET STATUS$="Warning, no response from Hylafax"
20376 CLOSE (CHAN,ERR=20377)
20399 RETURN
```

Posted: Wed Mar 15, 2006 2:24 pm   Post subject: eForms using mailcall, html fixes

OSAS 6.5 and up comes equipped with mailcall from SDSI. This utility can be used by eForms in lieu of the built-in SMTP program and works better in some situations. It also has a "prettier" interface when sending mail. I have begun suggesting this as the standard mail-sending method if it is available. To turn it on, make sure that the "Email Setup" in the standard OSAS progRM has been performed. Then change the eforms table to point to the location of mailcall (usually "../progRM"). These fixes will help with some issues that the eForms/mailcall interface has with HTML in the body and HTML attachments.

RCEMSND.MCL

Code:
```
1056 IF HTMLATTC THEN LET DAT.BODYMIME$="text/html"; REM 102105
1057 IF RCEADR.HTML$="H" THEN LET DAT.BODYMIME$="text/html"; REM 031506
1064 LET ERRMSG$=""; REM 070105
1066 IF CVS(ERRMSG$,3)<>"" THEN LET SENDERR=1; REM 070105
20717 IF HTMLATTC AND RCEMDE.SEQ$="01" AND POS(".HTM"=CVS(RCEMDE.DESC$,4)) THEN GOTO
20715; REM 062702 TO PREVENT ATTACHING HTML AND INCLUDING IT IN BODY
```

Posted: Mon Mar 27, 2006 10:10 am   Post subject: osas 7 bbj, old unform, path problem

Recently encountered a problem with an OSAS7 bbj install on a windows server. This installation is still using unform 5.0. When attempting to archive, unform returned an error that it couldn't find the input file. RCFPRNT.PUB, when setting up the scratch file uses STBL("RMPREFIX") which is stored in the Application Information for RM. In this case, I changed this to absolute pathing, since unform could not find the file in "../progRM". Also, I
changed the Base Directory in System File Maintenance/Directories to full absolute pathing instead of "../". This is required for email/fax when they invoke unform.

This should not be necessary if unform 6 is used, where the uf60c client is invoked and should be able to relate to relative pathing from the perspective of the OSAS session.

Posted: Tue Apr 04, 2006 12:05 pm   Post subject: OSAS7 bbj gui problems with screen focus

Found an issue with screen focus when email/faxing online PO's, SO's, etc. The ARC files in progRC need the line "DIALOGBEHAVIOR" after "MENUBAR DEFAULT" for each window.

Download 70rc_arc.zip with the correct .arc files from:

http://www.rcgweb.com/public_download/eforms_patches/

Unzip these into progRC or whatever your RM mods directory ended up being.

Thanks for the heads up, Scully.

rrw

Another heads up: if you have an early 7.0 install of eForms, the RC*.ARC files were put in the gui folder instead of progRC. It seems that the mods directory logic does not work correctly, one user found that the original faulty .ARC files were getting used until he removed them from the gui folder. At that point the new .ARC files in progRC were used and the behavior corrected itself.

Posted: Wed Apr 05, 2006 3:57 pm   Post subject: osas 7 intermittent archive bug

If the menu item being archived has a "parameter", eForms is skipping the archive (OSAS 7.0 only).
This is corrected for installs after 4/5/06.
Here is the fix needed, for both GENOUT.PUB, GENGUOUT.PUB.

Code:
```
20217 LET RCPGM$=FILL(15),RCPGM$(1)=RCMPROG$,RCPGM$(13)=RCPARAM$; REM FIRST TR
20217:Y PROGRAM + PARAMETER 092104,092704,012506,040506
```

Posted: Fri Apr 07, 2006 2:28 pm   Post subject: Some useful string tables for archiving

Sometimes the default behavior for archiving just won't do. Some clients want things named according to their particular preference. eForms will use these STBL's as overrides if they are set when the archive occurs.

Some examples of their use can be found in the programs, ARPRI1.RCA, ARSTM2.RCA, and RCARCFNM.PUB.

STBL("RCARCFOLDER"): set this to create a special subfolder for the job. It will be placed below the standard or overwrite path for the menu option. Our eForms-modified batch invoice program makes this customer id +customer name. Be sure to replace any spaces with "_" characters.

STBL("RCARCPFX"): If a given report is run several times a day, the naming convention of <File Prefix>_<date>_<time> might not be specific enough for some users. This STBL can be used as an additional identifier and can be set in the code just before the call to GENOUT.PUB. If a sales order post is being archived, for example, you could set this STBL to be the first batch id in the batch list, and the file created would have that batch id inserted after the file prefix: <File_prefix>_<batch>_<date>_<time>. Don't allow any spaces or special characters in this STBL or you may have unpredictable results. If you have defined your prefix as "po" and you want the po number to follow, do this:

Code:
```
RCARCPFX$=STBL("RCARCPFX");RCARCPFX$=RCARCPFX$+" "+PONUM$;A$=STBL("RCARCPFX",RCARCPFX$)
```

STBL("RCFORCEARCFNM"): Introduced in rev 5.07, this STBL allows you to override the default archive filename altogether. If eForms archive finds this STBL loaded at the time of archive file creation, it will use this as the name of the file (suffixed with .pdf). Be careful not to include any spaces or special characters in this STBL or you may have unpredictable results.
The proper time to load the STBL is immediately before the GENOUT.PUB call in your program. A sample program is provided which you can modify and call to prompt for a filename and load this STBL. (RCARCFNM.PUB) The particular example in the program builds the filename based on a combination of Company ID, GL Period, and a description from a table. The program is provided "as-is" for your convenience as an example. It will require modification for each specific application. The STBL is cleared on returning to the menu program.

Posted: Fri May 12, 2006 3:27 pm   Post subject: unform sometimes not invoked when faxing using hylafax

Problem with eforms using hylafax where unform output is sometimes left plain-jane.

Try changing these lines:

RCFXSND.HYL

Code:
```
1111 REM IF RCEMINF.SAVEIT$="0" THEN LET HYLAFILE$=RCEMINF.FILNM$; GOTO 1200;
1111:REM FIXED FOR NON UNFORM 021606
```

RCFXSND.FTP.HYL

Code:
```
1071 REM IF RCEMINF.SAVEIT$="0" THEN LET UNFORM=0,HYLAFILE$=RCEMINF.FILNM$; GO
1071:TO 1270; REM FORCE NO UNFORM 021606
```

Mon May 15, 2006 1:10 pm   Post subject: archiving in bbj sometimes dropping report lines in windows

Some reports have been reported to be missing lines when archived in a windows bbj environment. OSAS Accounts Payable, Post Transactions is one example. This is due to some differences in the way bbj is handling print to/from a file in the windows environment from the

way vpro5 handled things. Making the following changes should help:

Add/change these lines of code in RCFPRNT.PUB

Code:
```
1059 BBJ=0;A$=STBL("INTTYPE",ERR=1060);IF A$="BBJ" BBJ=1;REM RRW/RCG 051506
1060 REM RRW/RCG IF STBL("OPSYS")="UNIX" THEN READ(CHANNEL,END=COMPLETED)LINE$
1060: ELSE READ (CHANNEL,END=COMPLETED)LINE$,LF$
1061 IF STBL("OPSYS")="UNIX" OR BBJ THEN READ (CHANNEL,END=COMPLETED)LINE$ ELSE READ
1061:(CHANNEL,END=COMPLETED)LINE$,LF$;REM RRW/RCG 051506
```

Change the "alias PF" line in config.bbx to:

Code:
```
alias PF $FILE "Print file" FILE=PRINT.T0,SPCOLS=250,CPCOLS=250
```

Note: the OSAS install for bbj may leave SPCOLS and CPCOLS out of the config.bbx alias line for PF. If these are missing, some have reported that reports wider than 80 columns are printing blank lines to the archive.

Posted: Fri Aug 18, 2006 8:26 am   Post subject: Archive not active for some menu items: osas 7 gui

In gui mode in OSAS 7, if a menu item has a PARAM value, the archive
check box is being forced off no matter what the setting in archive is set to. A line needs to be changed in GENGUOUT.PUB:

Code:
```
20217 LET RCPGM$=FILL(15),RCPGM$(1)=RCMPROG$,RCPGM$(13)=RCMPARAM$; REM FIRST TRY
20217:PROGRAM + PARAMETER 092104,092704,012506,040506,081806
```

Note this is for **OSAS 7 ONLY**! The GENGUOUT.PUB code is different in previous versions and continues to work without changes.

Posted: Mon May 22, 2006 1:24 pm   Post subject: problems with internet email with osas version 7

First check the MCALL table in RCTB, you should see the entry:
../progRM
which tells eForms to use Mailcall as it's sending engine (it's included for free with OSAS 6.5 and OSAS 7).

Then make sure that you have done the normal Mailcall setup in Resource Manager, System Setup, E-Mail Setup. This must be done for mailcall to work.

Posted: Tue Sep 19, 2006 12:52 pm   Post subject: Error 12, osas 7, with "RCAUTOEM" table loaded

When using the STBL("RCAUTOEM") to preload customer/vendor email addresses before sending online forms, an error 12 has been discovered.

Fix this by changing this line of code in program RCEXPAND.PUB

Code:
```
1040 LET X$=FID(RCEADR),X=POS("RCEADR"=X$),F$=X$(X); REM 091906
```

Posted: Mon May 22, 2006 6:43 pm   Post subject: vsifax path problems with OSAS 7

Problem with VSIfax pathing?

Don't use ../ as the base path in RM, System Setup, Directories. Change this to a full path. If using windows, be sure that the server drive letter is also included. bbj seems to have a bug where it will allow the creation of a file with a full path name, but won't allow opening that file unless it has the drive letter preceding it.

FXPTH table should be setup relative to the server. Break out to a prompt and make sure you can open this directory to a channel. The autosend directory should be right below it.

OSDRV table contains the path back from vsifax to OSAS: this gets tacked onto the front of whatever the "Base Path" is + "/rcfax". It is where vsifax is told to look for the files to fax. If the base path is ../, this causes problems for vsifax getting back to rcfax folder to find it's files. Try changing the base path in RM, System Setup, Directories to a non-relative path.

I'm thinking of changing this vsifax stuff in a future revision to work like the client/server hylafax option, which uses ftp for remote server and a straight copy of all the files needed if the fax server is on the same box as OSAS. But then again, hylafax (free) is nudging out vsifax ($1500) as the best fax server option, so why bother? Any opinions?

Posted: Tue May 23, 2006 11:00 am   Post subject: batch load of fax numbers from osas database: found a bug

I tried the following today for adding all the OSAS customer fax numbers to form code "I" for invoices and found that it loaded none. This line should be rem'd out of RCEIMP.PUB to correct the problem:

Code:

```
20731 REM RRW/RCG 052306 IF FAXING THEN LET EMAIL$(1)=FAXNUM$
```

I want to start routing invoices and statements to my customers. We have many email addresses and fax numbers on file in the regular OSAS database and we don't want to rekey them. Is there an easy way to get these into the Customer Email Addresses/Customer Fax Numbers database so we can begin routing forms?

Yes. There is a trick to importing contacts from your OSAS database into your eForms contacts database. (Note: if you are running OSAS in gui mode, change to character mode first.) Do the following:

eForms/Internet Email/Email groups
Enter group id *RCIMPORT. This will not create a new group, but will allow you to import your contacts into customer email addresses.
Leave description blank and hit enter.
Select i(M)port.
Answer YES to "Exclude contacts without email address on file?"
For your import table, choose WIZARCU1 to add customer contacts. (You could also choose WIZAPVE1 for vendor comments, or WIZPAEG1 for employees).
Enter the Form Type you want to load. For invoices, this would be "I"; for statements, "S", etc. A selection screen will then display with from/thru for some of the customer fields. If you want all customers to be loaded, leave all selections blank. You can selectively choose a group of customers by filling in the from/thru values. When you hit page-down, eForms will load those customers with email addresses into Customer Email addresses with the form type you indicated.

Posted: Wed May 24, 2006 3:39 pm   Post subject: osas 7 bbj won't send email or fax attachments, only cover

If OSAS is on a windows server, check RM, System Setup Directories.
If the "Base Directory" has a full path, put the drive letter in front of it. bbj allows creation of a file with a full path, but won't allow it to be opened unless there's a drive letter.

Posted: Wed Jul 19, 2006 8:30 am   Post subject: OSAS 7 bbj Archive Control error

An error is occurring when attempting to set the override path in Archive Control when running bbj. This can be corrected with the following lines of code in program RCACMENU:

Code:

```
4126 ON POS(Y$="XMP") GOTO 4127,EXITWIND2,EXITWIND2,EXITWIND2; REM 071906
4160 EXITWIND2: REM 071906
```

Posted: Mon Oct 23, 2006 1:10 pm   Post subject: archiving, windows, unform error regarding rules file

Recently encountered a situation on Windows 2000 server where the archiving program trying to invoke unform failed because the length of the unform command was too long.

This should fix the problem:

Code:

```
LOAD RCARCH.PUB
1071 REM
SAVE
```

Posted: Fri Dec 15, 2006 6:56 pm   Post subject: eforms for osas 7, routed forms with archive problem

eForms Complete includes customized versions of Invoices and Statements which allow splitting the batch job to separate customer folders for archive and then routing the form to email/fax/print depending on customer preference.

eForms for OSAS had a bug that would cause the email/fax/print function to be skipped if archiving is enabled for these forms.

The following line of code can be added to both ARPRI1.RCA and ARSTM2.RCA to solve the problem.

Code:

```
25121 LET FILENAME$=STBL("SORT FILE")+"SCR9"+STBL("SORTSEQ")
```

Posted: Fri Dec 15, 2006 7:19 pm   Post subject: eforms complete with unform, non-plp forms

The eForms routed version of Invoices, History Invoices and Purchase Orders disregard the option switches for form type and force the Plain-paper form. This is done because only plain-paper forms fax and email with the headings and company information intact. Installations that use unform can use the other form types as well, since they are all included in the unform rules file and unform adds the headings, etc where needed. To allow the printing of these forms (found in the eForms, Batch Forms menu) to follow the settings in the option tables make the following changes.

eForms Routed Statements are only available in Plain-Paper format.

Invoices:
ARPRI.RCB

Code:

```
0076 REM 121206 LET PLP=1,FORM=1,LASEROFFSET=0; REM PLAIN PAPER FOR TRANSMIT F
0076:ORMS RRW/RCG 082302
1706 IF PLP THEN LET MSG_LEN=2 ELSE IF CVS(M$,3)="" THEN LET MSG_LEN=1 ELSE LE
1706:T MSG_LEN=2; REM  THIS CAUSED PROBLEMS WITH UNFORM PLAIN PAPER INVOICE;RE
1706:M RRW/RCG NO PLP FORCE 121206
```

History Invoices:
ARPRHIN.RCB

Code:

```
0049 CALL "GENGETOP.PUB",MENUAPP$,MSG$,O2$; REM TURN OFF PLP FORCE 121206 LET
0049:O2$(23,1)="1"; REM RRW/RCG READ OPTIONS, FORCE PLAIN PAPER INVOICE
```

Purchase Orders:
POPRP.RCB

Code:

```
0049 REM NO FORCE PLP VERSION 121206 LET O2$(24,1)=" "; REM FORCE PLAIN PAPER;
0049:REM RRW/RCG
```

Posted: Thu April 19, 2007 12:47PM   Post subject: gui problem with email/fax text edit box when too much text is entered.

In graphical mode, eForms provides a text edit box for entering the email/fax message which allows for line-wrap, etc. When re-entering the text box an error 29 appears if the text box has more than 250 characters. This can be solved by replacing the following line in RCEMHDR.PUB.

Code:

```
23040 IF CR THEN LET EBPRINT$=TEXT$(1,CR-1); LET TEXT$=TEXT$(CR+1); PRINT (OSG
23040:UI.CHAN)'TXADD'(4030,-1,1),EBPRINT$; GOTO 23030 ELSE LET EBPRINT$=TEXT$;
23040: PRINT (OSGUI.CHAN)'TXADD'(4030,-1,1),EBPRINT$
```

Posted: Thu April 19, 2007 12:47PM   Post subject: gui problem control characters in fax cover page

When a fax cover page message is entered in graphical mode, eForms puts a control character in the text to help determine when a hard carriage-return was entered. These control characters are showing up on the fax cover page when unform is used. To resolve this problem, change the following code in the program: RCCOVER.VRU.

Code:

```
DELETE 15229,15300

15229 TEXTONLY:
15230 DIM CVTEXT$[1:15]
15231 FOR I=1 TO 15
15232 LET RR$=RCEMINF.TEXT$[I]
15233 LET RR=POS($8A$=RR$)
15234 IF RR=0 THEN LET CVTEXT$[I]=CVTEXT$[I]+RR$; GOTO 15239 ELSE IF RR=1 THEN
15234: LET CVTEXT$[I]=CVTEXT$[I]+$0D0A$,RR$=RR$(2); GOTO 15233 ELSE LET CVTEXT
15234:$[I]=CVTEXT$[I]+RR$(1,RR-1)+$0D0A$,RR$=RR$(RR+1); GOTO 15233
15235 REM
15239 NEXT I
15250 FOR I=1 TO 15
15260 LET Q=POS("\"=CVTEXT$[I]); IF Q=0 THEN GOTO 15300
15270 IF Q=1 THEN PRINT (EMF)" " ELSE PRINT (EMF)CVTEXT$[I](1,Q-1)
15280 IF Q=LEN(CVTEXT$[I]) THEN LET CVTEXT$[I]="" ELSE LET CVTEXT$[
15280:I](Q+1)
15290 GOTO 15260
15300 PRINT (F)CVS(CVTEXT$[I],3)
15310 NEXT I

SAVE
```

Posted: Thu July 19, 2007 15:14PM   Post subject: osas 7 eForms return request not working

Starting with OSAS version 6.5, eForms defaults to using the 3rd party email sending program "mailcall" that is included in the OSAS Resource Manager. The mailcall version of eForms was missing the code for an optional return-receipt request. Add this line of code to the program: RCEMSND.MCL

Code:

```
1063 IF RCEADR.RETREQ$="Y" THEN LET DAT.OTHERHEAD$="Disposition-Notification-T
1063:o: "+CVS(RCEMINF.SENDEREM$,3); REM 071907
```

Posted: Tue September 4 2007 15:00PM   Post subject: confusion in gui mode with multiple recipients

eForms allows multiple recipients for each customer/vendor/employee. When sending a message, if eForms detects there are multiple recipients, you can choose one of them using the <F2> inquiry window or send to all the recipients by leaving the field blank. The message indicating these choices was missing from the screen when in gui mode. To add the message, paste these lines into the program RCEADR.PUB.

Code:
```
4053 IF POS(CODE$="CVER") THEN IF GUI THEN PRINT (OSGUI.CHAN)'TITLE'(100,RECIP
4053:MSG_GUI$) ELSE PRINT @(10,19),RECIPMSG$,@(15,20),RECIPMSG2$,; REM "112200
4053: 090407"
22171 LET RECIPMSG_GUI$="<F2> to choose or blank for all."; REM 090407
```

Posted: Thu September 6, 2007 10:38AM   Post subject: error 14 in online forms after sending emails in OSAS 7

eForms includes a modification to GENOPEN.PUB to avoid error 14 from called programs under some conditions. In OSAS 7, the modified GENOPEN.PUB is being ignored. Add this line of code to RMMENU and RMMENU2.

Code:
```
0023 DROP "GENOPEN.PUB",ERR=0024; REM 082907 NEED TO RUN RCG VERSION IN PROGRC
```

Posted: Thu October 25, 2007 2:15PM   Post subject: OSAS 7, BBJ, Windows problem with Multiple Copies

When running OSAS 7 with bbj, the "alias PF" in config.bbx should be setup as follows, for email and archiving to work correclty:

```
alias PF $FILE "Print file" SPCOLS=140,CPCOLS=140,FILE=PRINT.1
```

This conflicted with the OSAS logic for handling multiple file copies in OSAS 7. The code was corrected by adding/editing the following lines to the GENFPRNT.PUB program that resides in the progRC (or modsRM) directory.

Code:
```
0959 LET BBJ=0; LET A$=STBL("INTTYPE",ERR=0960); IF A$="BBJ" THEN LET BBJ=1; R
0959:EM RRW/RCG 051506;012307 moved this up higher
1060 REM RRW/RCG IF STBL("OPSYS")="UNIX" THEN READ (CHANNEL,END=COMPLETED)LINE
1060:$ ELSE READ (CHANNEL,END=COMPLETED)LINE$,LF$
1061 IF STBL("OPSYS")="UNIX" OR BBJ THEN READ (CHANNEL,END=COMPLETED)LINE$ ELS
1061:E READ (CHANNEL,END=COMPLETED)LINE$,LF$; REM RRW/RCG 051506
```