

Liaison Messenger - Case Study #1

The end-user wants to start faxing Invoices (for those customers that want invoices faxed), e-mail Invoices as an Adobe Acrobat PDF attachment to select customers overseas, and print invoices on blank paper for the balance of their customers. However, since they have a 3-month supply of pre-printed forms, they want to use up their existing inventory first and then switch to blank paper laser forms.

They want a File copy to print in the Accounting Department and the Customer copy to print in the Mail Room for those Invoices that need to be mailed.

At the time of Invoicing, they want to print Packing Slips in the shipping department. As a service to their largest customer's they do private label drop-shipments. Since their customers require source anonymity, they need to have their Customer's name (or logo) on the Packing Slips as the shipper/seller for those orders as if the products were shipped out of their warehouse.

The customer also frequently ships UPS international and would like the system to generate 3-part International Invoices (collated) for Customs and print them in the Shipping Department.

For other shipments going Carrier or their Truck they would like to have a 3-part Bill-of-Lading printed on blank continuous paper on the dot-matrix printer in the Traffic Managers Office or Dispatchers Office depending on how the shipment is routed.

As a Value Added Service to their customers, they want to e-mail Order Shipment Notifications to all customers at the time the order is shipped.

To improve internal communication and customer service, their commissioned salespeople want to be notified via e-mail when any of their orders is shipped.

And finally, these want to archive every invoice generated to disk so they can retrieve and reprint invoices should the need arise.

Configuring Messenger

WinFax PRO 3.0 or newer
Outlook 2000
Adobe Acrobat 4.0 Writer

Step 1 - Go into Messenger Properties and select SO Invoices tab. Next, configure or (add if needed) Ply n: and change the defaults as follows:

Ply 1

Routing Method – Map to Printer in Mail Room
Marginal Words -Customer Copy
Cascade – User's Preference

Ply 2

Routing Method – Map to Printer in Accounting
Marginal Words – File Copy

Ply 3

Template Library – Private Label Packing Slip
Routing Method – Map to Dot-Matrix Printer in Shipping Department
Marginal Words – Packing Slip
Alternate Heading – Packing Slip
Filter = Lmdoeh.custkey="ADV01"

Ply 4

Template Library – International Custom's Invoice
Routing Method – Map to Printer in Shipping Department
Marginal Words – Custom's Office
Filter = Lmdoeh.shipviakey="2"

Ply 5

Template Library – Bill-Of-Lading
Routing Method – Map to Printer in Traffic Manager's Office
Marginal Words - ORIGINAL
Filter = Lmdoeh.shipviakey="T"

Ply 6

Template Library – Bill-Of-Lading
Routing Method – Map to Printer in Dispatch
Marginal Words - ORIGINAL
Filter = Lmdoeh.shipviakey="A"

Ply 7

Routing Method – SendCopy via Fax
Marginal Words – Shipment Notification
Alternate Heading – Shipment

Ply 8

Routing Method – Archive to Disk
Constant Archive Folder: enter path of storage folder/directory
Marginal Words – File Copy

Ply 9

Routing Method – Send Copy via E-Mail
Constant email address: margretbergman@adv01.com
Marginal Words – Sales Copy
Filter = Lmdoeh.salespkey="BER01"

Ply 10

Routing Method – Send Copy via E-Mail
Constant email address: davidholmes@adv01.com
Marginal Words – Sales Copy
Filter = Lmdoeh.salespkey="HOL01"

Ply 11

Routing Method – Send Copy via E-Mail
Constant email address: yokohiyashita@adv01.com
Marginal Words – Sales Copy
Filter = Lmdoeh.salespkey="HIY01"

Liaison Messenger - Case Study #2

End-user wants to Fax order acknowledgements and print sales orders using blank paper. They want one copy to print in the Accounting Department, and have a Sales Copy distributed to the respective in-house and remote salespeople.

They maintain 2 warehouses, 1 in California and the other in Florida. End-user needs to fax Pick Tickets to these warehouses. But they only want the applicable items to appear on the respective pick tickets. Meaning only the items warehoused at that location should appear on the each pick ticket.

The Pick Tickets need to show the bin numbers of that warehouse but also the on-hand quantities of each of the applicable items. Also needed is an area for the stock selector to hand write in the actual amount pulled/shipped for the order. Required on each Pick Ticket is their 800 Fax number (invoice processing department) to appear somewhere on the pick ticket.

Oh yes, they want to digitally archive their Sales Orders to disk for retrieval and reprinting. They do not want to spend a lot of money for an expensive document imaging/management system.

Lastly, since they are a mail-order distribution company, they need to print these Sales Orders and Acknowledgements as they are entered, a batched print and post would not be efficient in this environment

Configuring Messenger

WinFax PRO 3.0 or newer
Outlook 2000
Adobe Acrobat 4.0 Writer

Step 1 - Go into Messenger Properties and select Sales Order tab. Next, configure or (add if needed) Ply n: and change the defaults as follows:

Ply 1

Routing Method – Map to Printer in Accounting Department
Marginal Words -Accounting Copy

Ply 2

Routing Method – Send Copy Via Fax
Marginal Words - Customer Acknowledgement
Alternate Heading - Acknowledgement

Ply 3

Template Library – Picking Ticket
Routing Method – Send Copy Via Fax
Constant Fax Number: enter fax number of California Warehouse
Marginal Words - CALIF-Picking Ticket
Alternate Heading – Pick Ticket
Filter = Lmdoel.location="CALIF"

Ply 4

Template Library – Picking Ticket
Routing Method – Send Copy Via Fax
Constant fax number: Enter fax number of Florida Warehouse
Marginal Words - FLRDA-Picking Ticket
Alternate Heading – Pick Ticket
Filter = Lmdoel.location#"CALIF"

Ply 5

Routing Method – Map to Shared Printer on Margret's PC
Marginal Words - Sales Copy-Margret Bergman
Filter = Lmdoeh.salespkey="BER01"

Ply 6

Routing Method – Send Via E-Mail
Constant e-mail address: yokohiyashita@adv01.com
Marginal Words - Sales Copy-Yoko Hiyashita
Filter = Lmdoeh.salespkey="HIY01"

Ply 7

Routing Method – Send Via E-Mail
Constant e-mail address: davidholmes@adv01.com
Marginal Words - Sales Copy-David Holmes
Filter = Lmdoeh.salespkey="HOL01"

Ply 8

Routing Method – Archive to Disk
Constant Archive Folder: enter path of storage folder/directory
Marginal Words – File Copy

Step 2 - Finally, go into System Configuration and set Sales Orders to:

Scope: All Orders
Interval = 1
Increment = Minutes
Update Platinum Status Code=YES