

**All Modules**  
**User Guide Addendum**  
**Version 5.30**  
**Last Update: December 2009**



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# About this Fourth Generation Documentation Addendum:

This Fourth Generation Documentation Addendum is provided to bring the associated 'base' document up to date with the very latest changes and additions to the software product. The 'base' document is listed on the title page of this addendum.

## **Addendum Date:**

All software patches and supplements that have an impact on the base document are also covered by this addendum. Software patches and supplements are posted on the Fourth Generation web site in the customer area and on the Fourth Generation ftp site (see web/ftp access below). Patches and feature supplements are listed by the date posted. All patches and supplements posted by the Addendum Date are covered by this addendum. Each time a new patch or supplemental feature is released, this addendum will be updated if a documentation change is required. At that time, the Addendum date will be updated to the latest patch or supplement date.

## **Information not covered by this addendum:**

This addendum covers only the subject area of the base document. For additional information and technical details on the new features or patches, please consult the product release notes and patch/supplements indexes found in the customer area of the Fourth Generation Web site or FTP site. (see web/ftp access below)

## **Web/FTP Access:**

All new features and patches are maintained on the Fourth Generation web site, in the customer area: [www.fourthgeneration.com](http://www.fourthgeneration.com) and also on the Fourth Generation FTP site: [ftp.fourthgeneration.com](ftp://ftp.fourthgeneration.com). Updated versions of this Addendum will be posted there as well. Most of the files and information in these areas is restricted to customers with current software maintenance contracts. To receive a current password to access these areas, please contact the Fourth Generation help desk: 770-432-7623, 1-800-374-6157, [support@fourthgeneration.com](mailto:support@fourthgeneration.com)

# Feature Listing

<b>Feature Number</b>	<b>Description</b>
<b>1288/1780</b>	<b>Flexible Document Delivery</b>
<b>1298</b>	<b>OE Tracking Screen City Codes</b>
<b>1301</b>	<b>Banner Messages</b>
<b>1302</b>	<b>Date, User ID, and Time Stamp Notes</b>
<b>Several</b>	<b>Export to Excel</b>
<b>1764</b>	<b>Remittance Address Print</b>
<b>1805</b>	<b>Email Alerts for Held Production Orders</b>

**1288/1780**

## **Flexible Document Delivery**

The 'Flexible Document Delivery (FDD) feature allows the user to direct report output to printers (host or client), email, or fax. This feature is only available for Fourth Generation clients that are running Fitrix version 5.2.

The following report programs have been modified to have background print so that forms no longer need to be purchased. These programs also support FDD.

### **Order Entry:**

Order Acknowledgement

Picking Ticket (FDD enabled for background print only)

Packing List (FDD enabled for background print only)

Invoice

All Export forms (Proforma, Packing List, Bill of Lading, Commercial Invoice, Provisional Invoice, and Final Invoice)

### **Purchasing:**

Vendor Purchase Order

### **Accounts Receivable:**

Invoice

Customer Statement

Dunning Letters

## **SET UP REQUIRED:**

## New Visual Menus Client:

Please contact our Help Desk at ([support@foruthgeneration.com](mailto:support@foruthgeneration.com)) to get information about receiving the Visual Menus client.

## Elm:

This software is required to send documents via email. Please contact our Help Desk at ([support@foruthgeneration.com](mailto:support@foruthgeneration.com)) if you need assistance with installation.

## Installation and configuration

Download latest version of ELM source:

<http://www.instinct.org/elm/files/tarballs/elm2.5.8.tar.gz>

<http://www.tucows.com>

Place the download in any temporary directory (/usr/local/pub).

```
$ cd /usr/local/pub
$ tar xvfz elm2.5.8.tar.gz
$ cd elm2.5.8
$ ./Configure [Take all defaults except the one below]
...
Any additional cc flags? [-fpcc-struct-return] -fpcc-struct-return -
DI_STDARG
...
See appendix A:
```

## Configuration:

Set the smtp server you are using (get this from your ISP).

```
$ vi /etc/mail/local-host-names
```

```
# local-host-names - include all aliases for your machine here.
smtp.ispmailserver.net
```

For each user:

```
$ elm
Notice: ELM requires an ".elm" subdirectory off your
home directory
May I create this directory for you (yes/no/quit) ?
[y] : <NL>
Notice: ELM requires a "/home/loginname/Mail"
directory
May I create this directory for you (yes/no/quit) ?
[y] : <NL>
Command: <q> {No <NEWLINE> required}
```

```
$ /sbin/service sendmail start
  Starting sendmail:
[ OK ]
  Starting sm-client:
[ OK ]
```

If the process of starting these services takes a long time, look at your '/etc/hosts' file and make sure that a Fully Qualified Domain Name (FQDN) is set. For example:

```
10.0.0.281    myserver.mydomain.com    myserver
              not just
10.0.0.281    myserver
```

## Testing:

Use the testing script 'elmtest.sh' in '\$fgtooldir/bin':  
elmtest.sh [myname@mycompany.com](mailto:myname@mycompany.com)

## Brief ELM tutorial:

To manage 'elm' a user types elm at a command prompt. You may also use the standard 'mail' program.

\$ elm

```
Mailbox is '/var/spool/mail/toms' with 1 message [ELM 2.5 PL8]

1  Apr 10 * To faxmaster@pengu (52)  HylaFAX Usage Report

You can use any of the following commands by pressing the first character;
delete or undelete mail, mail a message, reply or forward mail, quit
To read a message, press <return>.  j = move down, k = move up, ? = help

Command:
```

### Most often user commands:

```
$          Resynchronize folder
c          Change to another folder
!         Your main "incoming" mail folder.
>         Your "received" mail folder.
<         Your "sent" mail folder.
d          Delete current message
q          Quit
Q         Quick quit - no prompting
```

## Appendix A:

If the 'Any additional cc flags' question was missed, you must manually change file: `./src/curses.c`.

Change:

```
#include <assert.h>
#ifdef I_STDARG
# include <stdarg.h>
#else
# include <varargs.h>
#endif
```

to:

```
#include <assert.h>
#define I_STDARG
#ifdef I_STDARG
# include <stdarg.h>
#else
# include <varargs.h>
#endif
```

## Hylafax:

This software is needed to send documents via fax. Please contact our Help Desk at ([support@foruthgeneration.com](mailto:support@foruthgeneration.com)) if you need assistance with installation.

### Installation and configuration is Hylafax Software

Download latest version of Hylafax:

[http://www.hylafax.org/content/Main\\_Page](http://www.hylafax.org/content/Main_Page)

Install:

```
$ rpm -i sharutils-4.2.1-22.2.i386.rpm [Version may be different]
$ rpm -i hylafax-4.4.4-1rhel4.i386.rpm [Version may be different]
$ rpm -i uucp-1.07-9.i386.rpm (if needed) [Version may be
different]
$ rpm -i sendmail-cf-8.13.1-4.legacy.i386.rpm (if needed)
[Version may be different]
```

### Install modem

Make sure a modem is physically connected to the server. The example below assumes 'ttyS0'.

```
$ cu -l ttyS0
Connected.
at+fclass=?
0,1,2.0

OK
~. <no newline>
Disconnected.
```

## Fax setup

Determine the fax number of the modem line. The example below assumes:  
'321-512-1234'

```
$ PATH=/usr/sbin:$PATH
```

```
$ faxsetup
```

```
Should an entry be added for the FaxMaster to /etc/aliases [yes]? <NL>
...
Are these ok [yes]? <NL>
Country code [1]? <NL>
Area code []? 678
<NL> to next questions
...
The non-default scheduler parameters are:
...
Are these ok [yes]? <NL>
Should I restart the HylaFAX server processes [yes]? <NL>
Do you want to run faxaddmodem to configure a modem [yes]? no

Done verifying system setup.
```

```
$ faxaddmodem
```

```
Serial port that modem is connected to []? ttyS0
...
Country code [1]? <NL>
Area code [415]? 678
Phone number of fax modem [+1.999.555.1212]? +1.678.512.1234
Local identification string (for TSI/CIG) ["NothingSetup"]? Main Setup
<NL> to next questions
...
Are these ok [yes]? <NL>
Probing for best speed to talk to modem: 38400 OK. <NL>
How should it be configured [1]? <NL>
DTE-DCE flow control scheme [default]? <NL>
...
Are these ok [yes]? <NL>
...
Are these ok [yes]? <NL>
```

```
$ faxmodem ttyS0
```

## Fax utilities

Check the status of faxing:

```
$ faxstat -das
```

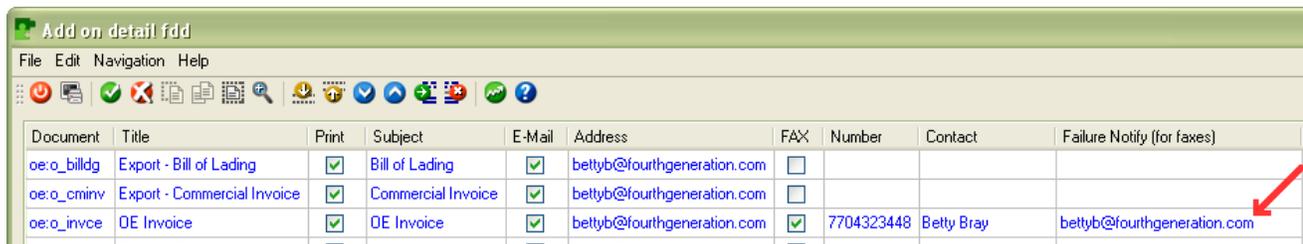
```
HylaFAX scheduler on condor.fgss.com: Running
Modem ttyS0 (+1.678.589.4894): Waiting for modem to come ready

JID  Pri S  Owner Number          Pages Dials      TTS Status
41   127 D   toms 97704323448    3:3   1:12
40   127 D  bettyb 97704323448    2:2   1:12
```

Remove Fax queue entries by ID:

```
$ faxrm 40 (You can only remove entries with your login)
Remove faxrm
```

A designated user will receive an email if a fax failed.



Document	Title	Print	Subject	E-Mail	Address	FAX	Number	Contact	Failure Notify (for faxes)
oe:o_billdg	Export - Bill of Lading	<input checked="" type="checkbox"/>	Bill of Lading	<input checked="" type="checkbox"/>	bettyb@fourthgeneration.com	<input type="checkbox"/>			
oe:o_cminv	Export - Commercial Invoice	<input checked="" type="checkbox"/>	Commercial Invoice	<input checked="" type="checkbox"/>	bettyb@fourthgeneration.com	<input type="checkbox"/>			
oe:o_invce	OE Invoice	<input checked="" type="checkbox"/>	OE Invoice	<input checked="" type="checkbox"/>	bettyb@fourthgeneration.com	<input checked="" type="checkbox"/>	7704323448	Betty Bray	bettyb@fourthgeneration.com

# Fax cover:

## Fax Cover Sheet

To: Jane Doe fax\_to

Fax Number: 97704323448

Company: John Doe fax\_contact

From: Fromme Inc. fax\_from

Re: Pizza Order fax\_re

Today's Date: Mon Apr 14 2008, 14:09 EDT

# of pages to follow this sheet: 1

```
sendfax -f "$fax_fail_notify ($fax_from)" \  
-R \  
-r "$fax_re" \  
-x "$fax_contact" \  
-d "$fax_to@${cDialOutPrefix}${fax_number}"
```

## Fitrix Application Set Up:

A new icon labeled Document Delivery has been added to the Update Customer Information and Update Vendor Information Toolbar and is only accessible when in Update mode.

**Update Customer Information**

File Edit View Navigation Tools Actions Options Help

Quit Print OK Cancel Cut Copy Paste Zoom Notes U Fields To Do Technical status Help

Ship-To Activity Add Info Billg Info OE Info Ship Notes Credit Notes Credit Ltr Credit Card Order Price Sales Aging Terms Document Delivery

Find Prev Next Add Update Delete Browse Options

Code: 20 Contact: JIM YAN

Company: MIDWAY SUPER SUPPLY Phone: 206 443 9393

Address: 7800 GREEN LAKE WAY Cell:

City: SEATTLE FAX:

State: WA Zip: 98524

Country: US USA

Email:

Web Address:

Salesperson: TM TOM MACK

Terms: C NET 15

Balance: 59809.22

Credit Limit: 122000.00

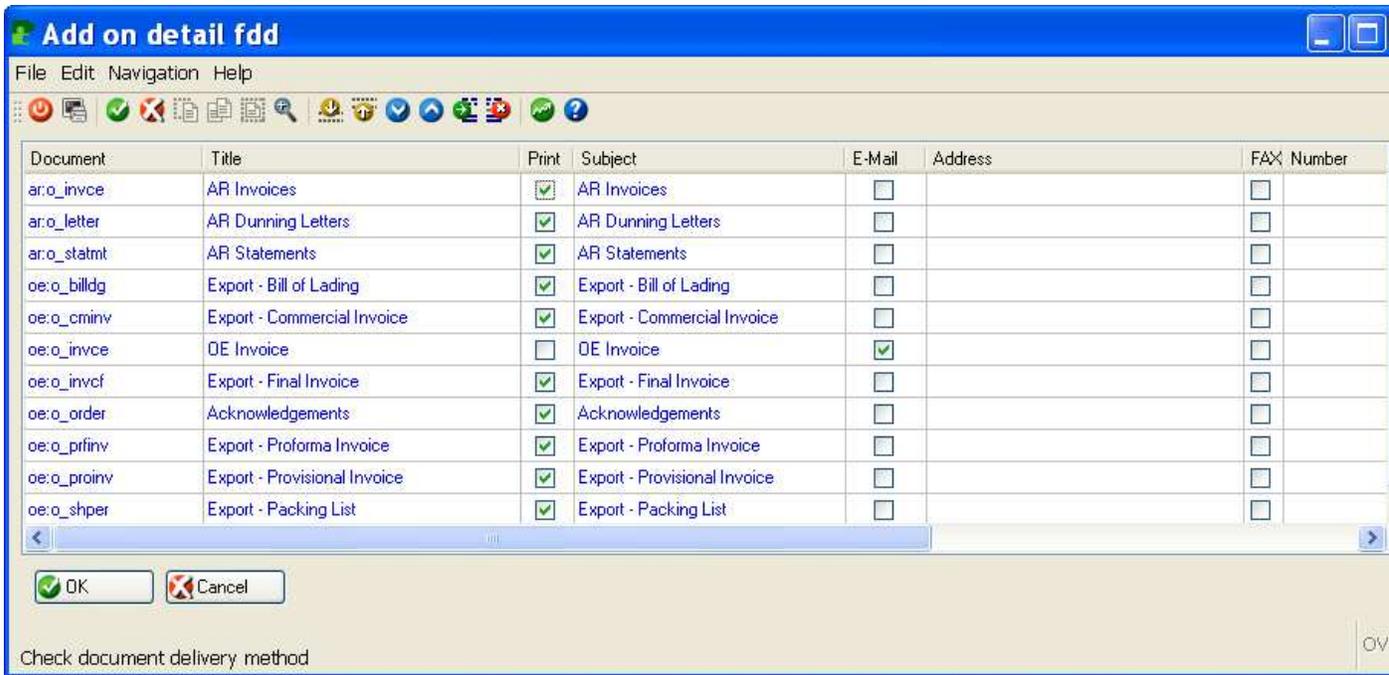
Credit Hold: Credit Hold Date:

1 of 1

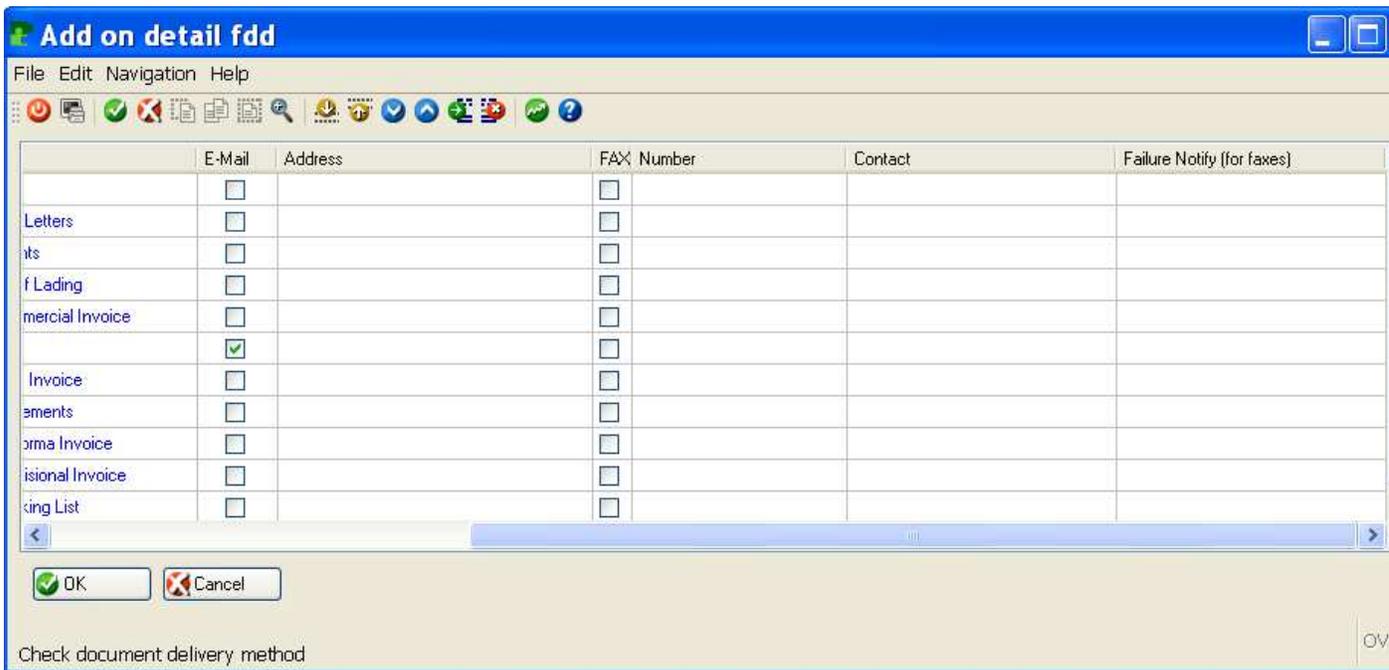
OK Cancel

Enter a unique code to identify this customer.

When you click on this icon the following screen displays listing all report programs that currently support FDD/Background Print:



By scrolling to the right the two additional fields for fax Contact and Failure notify can be viewed.



After FDD is installed by going into update mode for each customer the default setting will be set to Print for all reports. You can then update for each customer as necessary.

**Field Definitions:**

Document – Fitrix program name.

Title- Title of program.

Print- check this check box if the delivery method is to send the report to a printer.

Subject – subject line for your fax cover sheet.

E-mail- check this check box if the delivery method is to send the report via email.

Address- the email address you wish to send the report to.

FAX - check this check box if the delivery method is to send the report via fax.

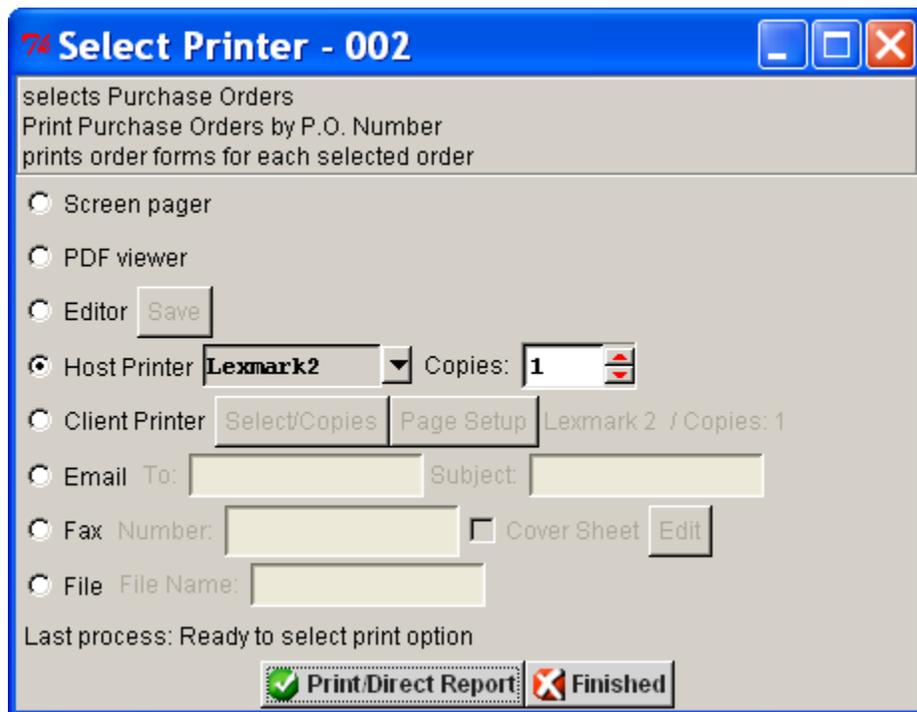
Number- the fax number you wish to send the report to.

Contact – the name of the person that will print on the fax cover sheet that will receive the fax.

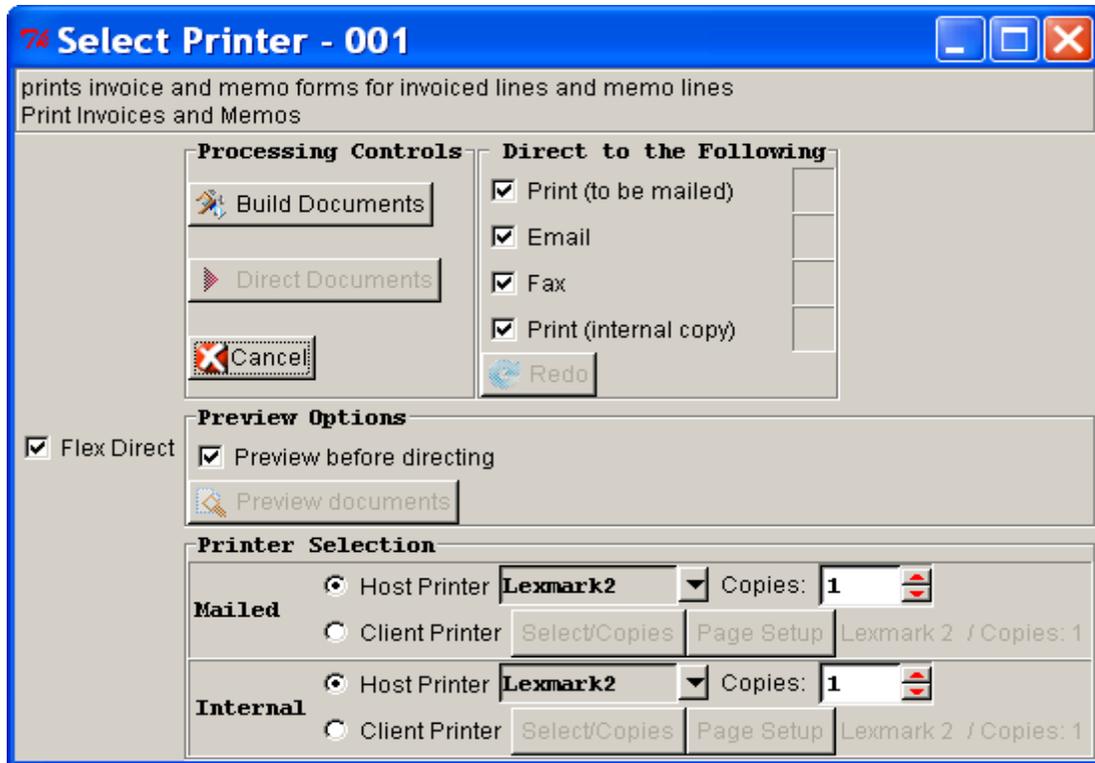
Failure notify – the email address of the employee that should be notified in the event the fax was not sent.

## FDD PRINTER DIALOG BOX:

Report programs that do not support FDD will have this standard printer dialog box:



Here is the new FDD printer dialog box:



If you do not wish to use the flex direct options simply uncheck the flex direct box and the printer dialog box will disable the FDD options and display all options that are on the non FDD printer dialog box.

**Select Printer - 001**

prints invoice and memo forms for invoiced lines and memo lines  
Print Invoices and Memos

**Processing Controls**

Build Documents  
Direct Documents  
Cancel

**Direct to the Following**

Print (to be mailed)  
 Email  
 Fax  
 Print (internal copy)  
Redo

**Preview Options**

Flex Direct  Preview before directing  
Preview documents

**Printer Selection**

Mailed

Host Printer Lexmark2 Copies: 1  
 Client Printer Select/Copies Page Setup Lexmark 2 / Copies: 1

Internal

Host Printer Lexmark2 Copies: 1  
 Client Printer Select/Copies Page Setup Lexmark 2 / Copies: 1

Screen pager  
 PDF viewer  
 Editor Save

Host Printer Lexmark2 Copies: 1  
 Client Printer Select/Copies Page Setup Lexmark 2 / Copies: 1

Email To: \_\_\_\_\_ Subject: \_\_\_\_\_

Fax Number: \_\_\_\_\_  Cover Sheet Edit

File File Name: \_\_\_\_\_

Last process: Ready to select print option

Direct Report  Finished

The FDD printer dialog box is divided into three sections:

**Processing controls:**



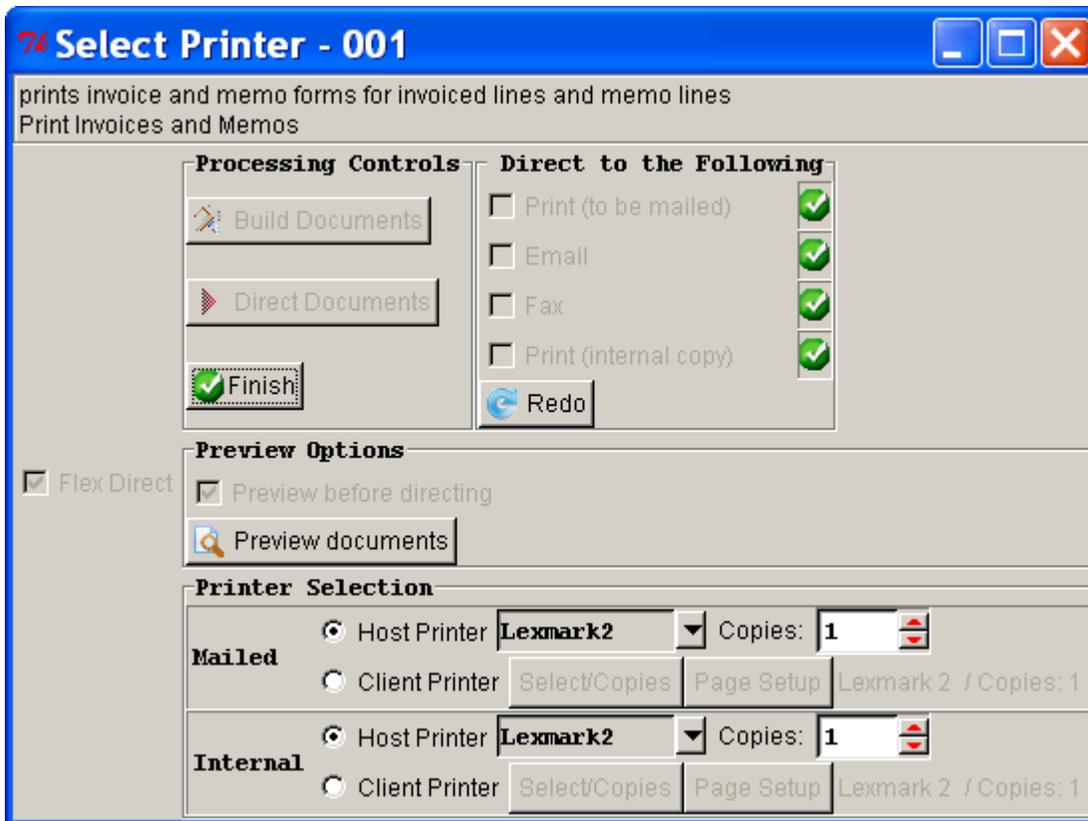
The example above shows that the documents will be processed via print to be mailed, email, fax, and internal print to be filed. These boxes can be unchecked as needed.

The first step is to click the Build Documents button. If the Preview before directing check box is checked you will be able to view a PDF of the documents prior to sending/printing them. Please note that if you click the Cancel button before clicking the Direct Documents button you will need to select the reprint option when you process your documents as the Build Documents options sets the print flag to Y at the table level even though you have not printed/sent your documents.



The next step is to click the Direct Documents button. This will send/print the documents. See discussion on Printer Selection section below for directing the documents to your various printers.

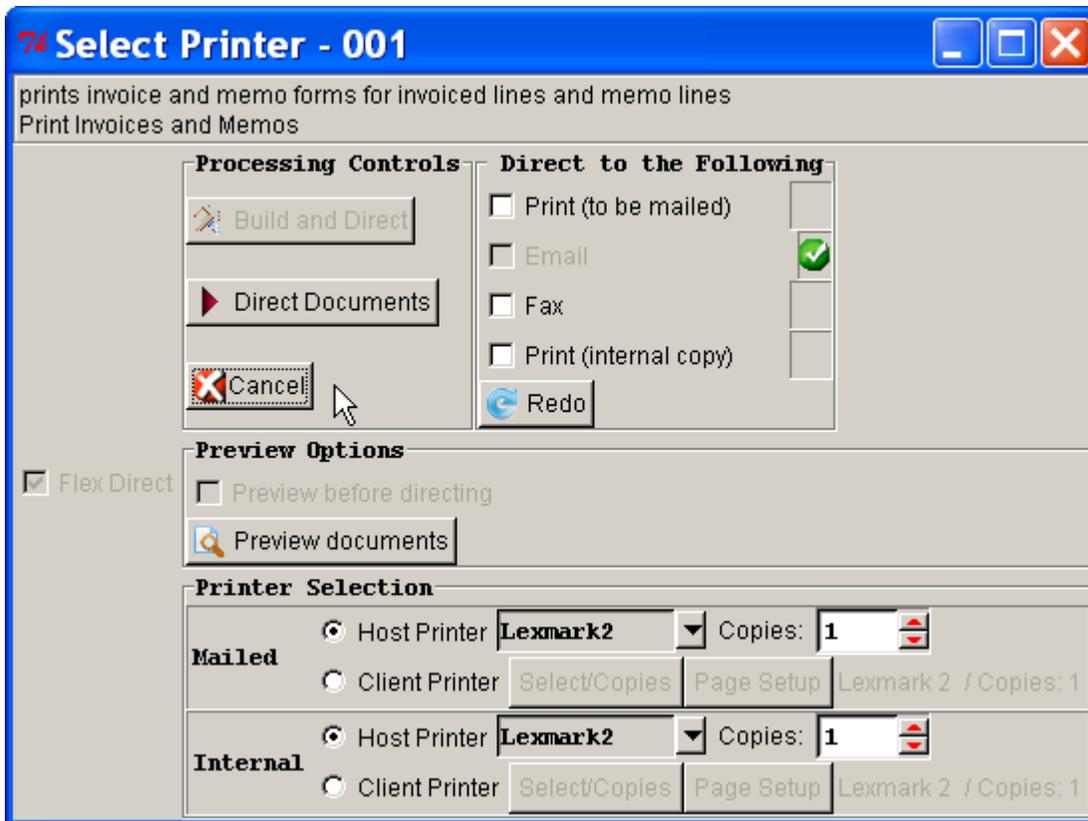
If all Direction method check boxes were checked, the printer dialog box will look like this after the documents were printed/sent:



The green check marks indicate the direction methods that were processed. To return to the menu, click the finished button.

In the event that you want to process the documents again (an example of the need for this would be if the printer ran out of paper or the paper jammed) click the redo button and then check the direction method check box that you wish to process again. Once the direction method check boxes are checked, click the Direct Documents button to reprint/resent your documents.

If you uncheck some of the selection methods (ie- only check email check box) and then process the documents the printer dialog box will have a Cancel button instead of a Finished button



To return to the menu click the Cancel button and you will receive this warning:



This warning is just to let you know that all delivery methods were not selected. Click Yes if this is correct. Click No if you wish to display the printer dialog box again.

## Preview Options:



The screenshot shows a dialog box titled "Preview Options". It contains a checked checkbox labeled "Preview before directing" and a button labeled "Preview documents" with a magnifying glass icon.

If this check box is checked (and that is the default setting) you will be able to preview a PDF of the documents by clicking the Build Documents button prior to Directing/Processing them. If you do not wish to preview, uncheck this box.

## Printer Selection:



The screenshot shows a dialog box titled "Printer Selection". It is divided into two sections: "Mailed" and "Internal". Each section has two radio buttons: "Host Printer" (selected) and "Client Printer". The "Host Printer" option includes a dropdown menu showing "Lexmark2" and a "Copies" spinner set to "1". The "Client Printer" option includes two buttons: "Select/Copies" and "Page Setup", followed by the text "Lexmark 2 / Copies: 1".

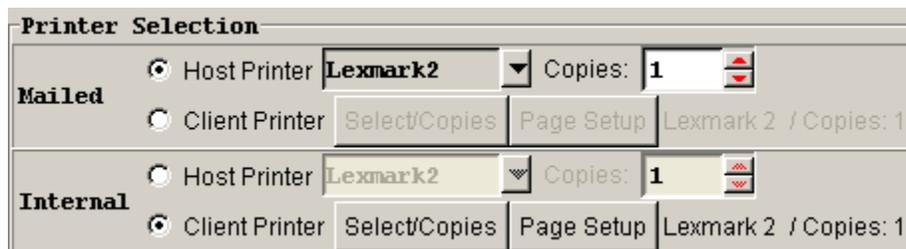
This section of the screen controls printer selection.

Mailed – printer selection will only be accessible if the Print (to be mailed) check box is checked. Select either a network printer or a client printer and the number of copies to print for the documents that will be mailed.

Internal - printer selection will only be accessible if the Print (internal copy) check box is checked. Select either a network printer or a client printer and the number of copies to print for the documents that will be printed for internal purposes.

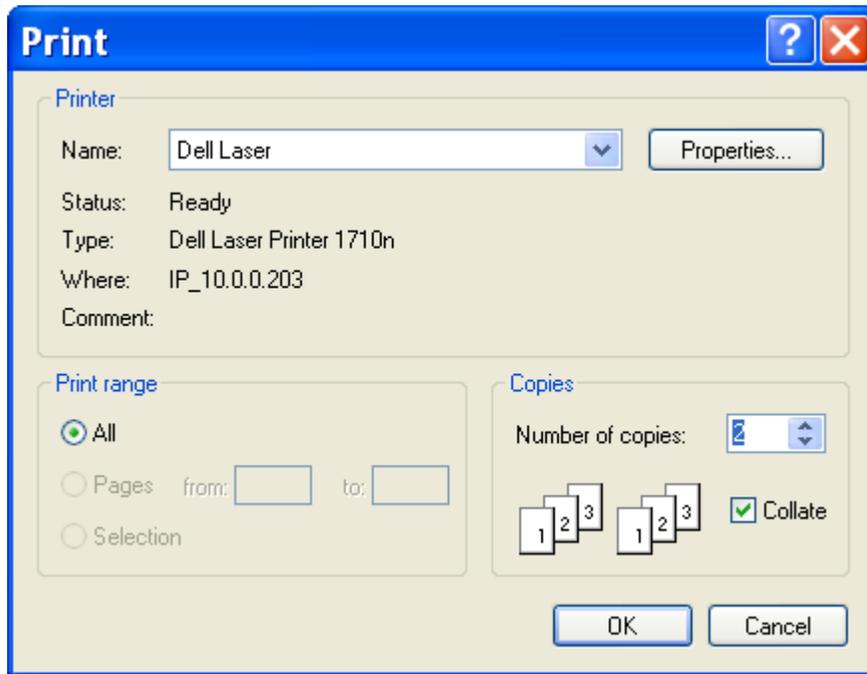
### Note about Client Printers:

If you change your printer selection to a client printer the printer selection section will display two new buttons:

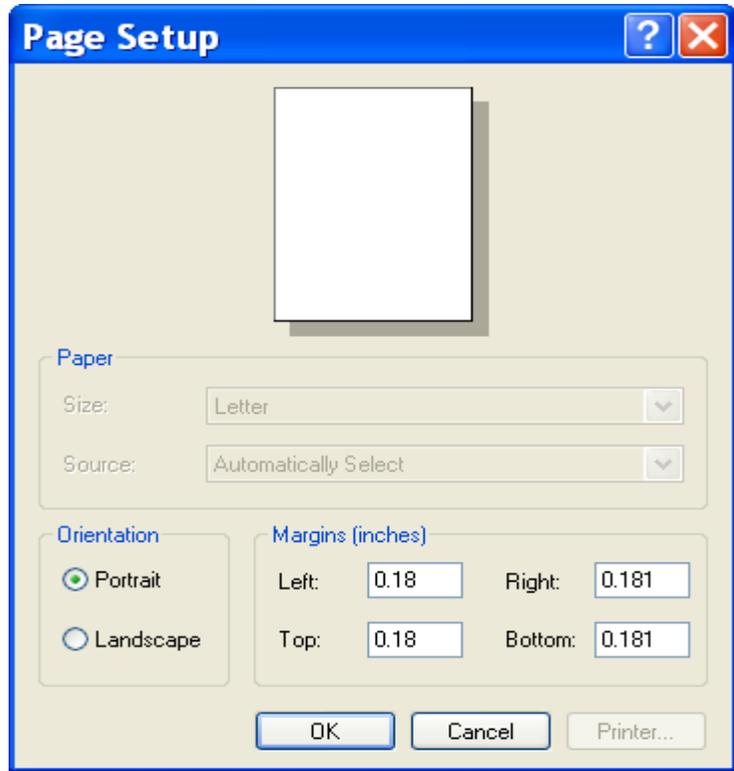


This screenshot is identical to the previous one, but the "Client Printer" radio button is selected in both the "Mailed" and "Internal" sections. The "Host Printer" radio buttons are now unselected. The "Select/Copies" and "Page Setup" buttons are now visible and active for the selected "Client Printer" options.

Select/Copies – click this button to select the client printer and the number of copies you wish to print:

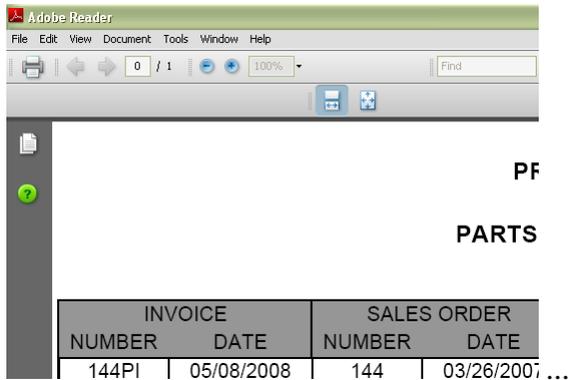


Page Setup – click this option to review/change the page set up:



To proceed click the Build Documents button. Since a client printer was selected, Adobe Acrobat will direct copy(s) to the printer.

The user will see Adobe Acrobat Reader Launch and appear briefly:



You may see a message like:



This means that Adobe Acrobat Reader is not installed. This is a free product and may be downloaded and

installed from: <http://www.adobe.com> by clicking on:



## 1298

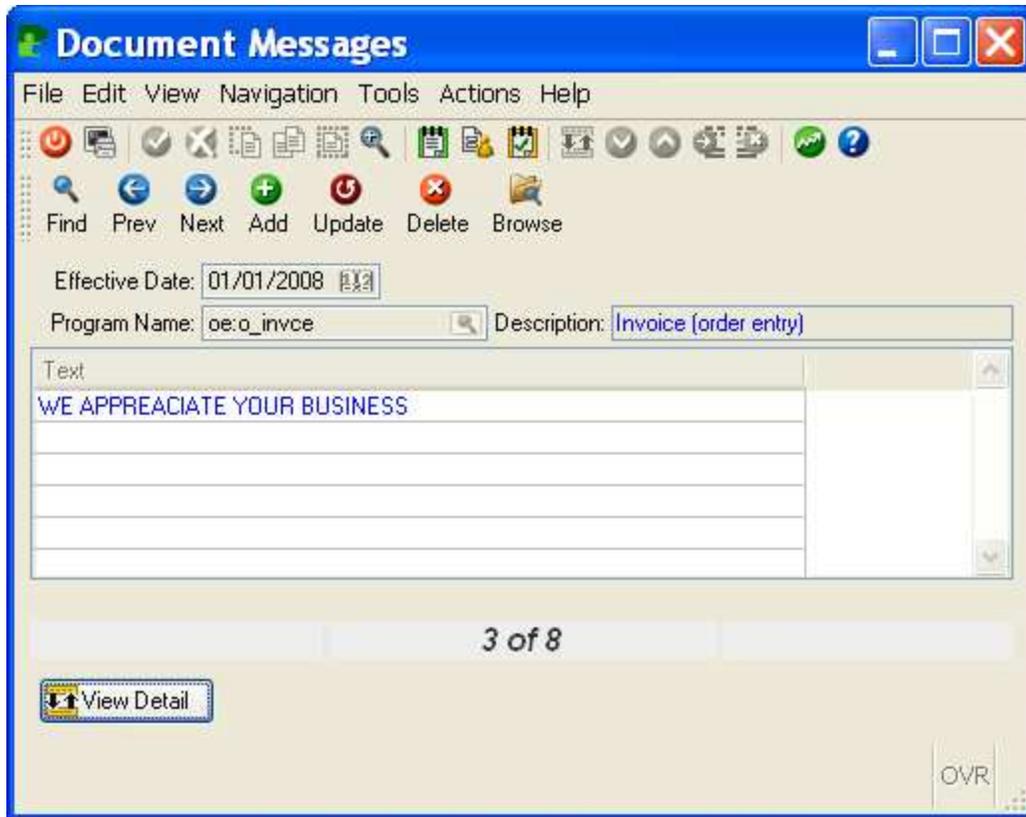
### OE Tracking Screen City Codes

This program for City Codes is located on the Company Setup menu (option i). The Fitrix database comes preloaded with all cities worldwide. The data stored in the city code table is used to validate the shipment destination entered on the Order Entry summary screen (see feature # 1298 discussion in the Order Entry Addendum).



## Feature 1301 Banner Messages

This program is located on the Company Setup menu (option i). This program enables you to enter messages that you would like to have printed on various forms.



1. Go into Add mode.
2. Enter the effective beginning date for the message.
3. Enter the program name. Zoom is available and the following programs have been modified so that the message entered here will print:

<b>Name</b>	<b>Description</b>
oe:o_order	Order Acknowledgement
oe:o_picker	Picking Ticket
oe:o_shipr	Packing Slip
oe:o_invce	Invoice (order entry)
oe:o_prfinv	Proforma Invoice (export)
oe:o_shper	Packing List (export)
oe:o_billdg	Bill Of Lading (export)
oe:o_cminv	Commercial Invoice (export)
oe:o_proinv	Provisional Invoice (export)
oe:o_incf	Final Invoice (export)
pu:o_order	Purchase Order
ar:o_invce	Invoice(accounts receivable)
ar:o_stmt	Statement of account

4. Enter the detail section of the screen to enter your message.
5. Click OK or press Enter to store.

## Feature 1302 Stamp freeform notes with date, time, and user ID.

In update mode, the user brings up Freeform notes by pressing Ctrl N or clicking on  :

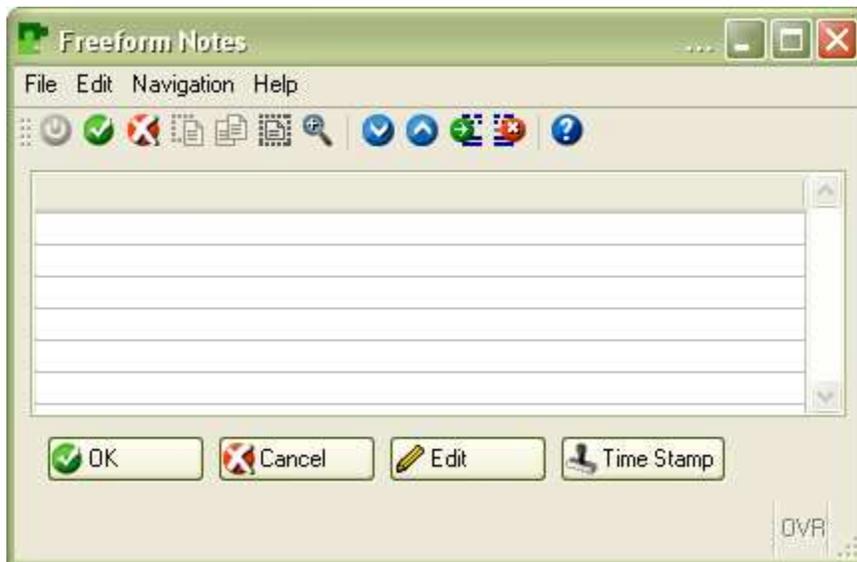
If a note already exists and the user requests a 'Time Stamp' by clicking:  :

1. Place 5 blank lines at the top of the existing notes.
2. Existing notes are 'pushed' down to begin at line 6.
3. The new line 1 is stamped with user, date, time.

If no previous notes exist, and the user requests a 'Time Stamp' by clicking on

 :

1. Line 1 of the notes is stamped with user, date, time.
2. The user is placed on line 2



The format of the time-stamp line is:

User: <Login name> on: <MMM DD, YYYY> at: <MM:SS>

for example:

User: johns on: Feb 12, 2008 at 3:10 PM

In the case of the previous note existing, if the new note is more or less than 5 lines user will need to use the F1/F2 keys to insert/delete lines.

## **Feature Several    Export to Excel**

The following reports can now be exported to Excel:

### **Accounts Payable:**

Vendor Aging  
Vendor Ledger

### **Accounts Receivable:**

Customer Aging  
Customer Ledger

### **General Ledger:**

All Financial Statements

### **Inventory Control:**

Inventory Valuation Reports  
Count Sheets  
Summary and Detail by Item Code or Class  
Item Status  
Count Sheets  
Price/Cost List  
Over/Short report  
Stock Status  
Reorder report  
Purchase/Sales History  
Inventory Turns  
Stock Locations by Bin

### **Purchasing:**

Print Non Inventory Items  
Print Item Catalog  
Print Vendor Catalog  
Order Summary By PO Number, Buyer, Vendor  
Order Detail by PO, Vendor, Buyer  
Order Detail by Item Code  
Order Detail by GL Code  
Goods Received by GL Code  
Price Change

Direct Ship Status

**Order Entry:**

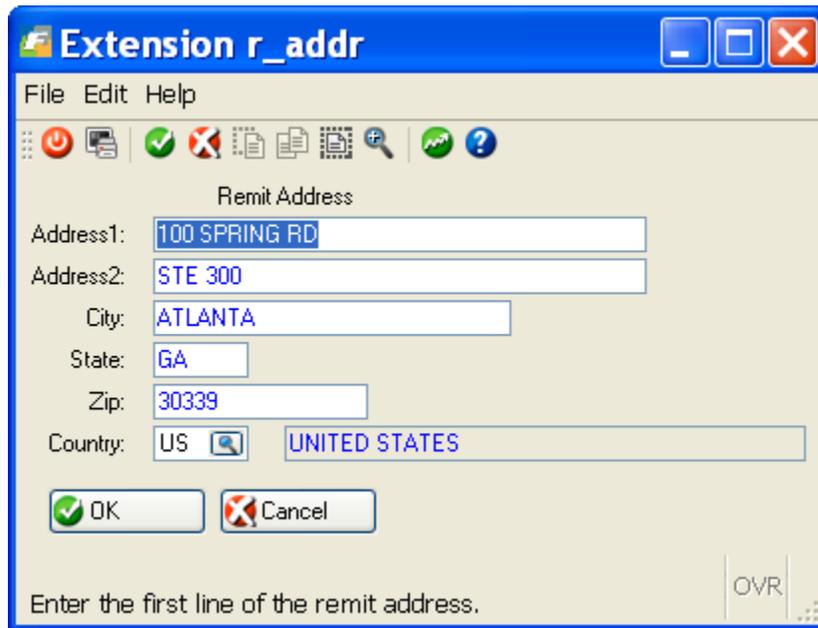
Print Credit Card Information  
Expired Credit Card Report  
Print Open Order Summary  
Print Salesperson Summary  
Print Salesperson Detail  
Print Open Order Item Summary  
Print Open Order Item Detail  
Print Customer Order Summary  
Print Customer Order Detail  
Daily Sales Register  
Product Summary  
Product By Date Summary  
Product Detail  
Customer Summary  
Customer Detail  
Salesperson Summary  
Salesperson Detail  
Salesperson By Product  
Price Variance  
Commission By Salesperson  
Special Pricing Definitions  
Print Credit Card Information

**Replenishment:**

Print Usage Summary  
Print Replenishment Data  
Print Recommendations

## Feature 1764 Remittance Address Print

A new icon labeled “Remit” has been added to the Update Company Information program. This remittance address prints on both the Order Entry Invoice and Accounts Receivable invoice.



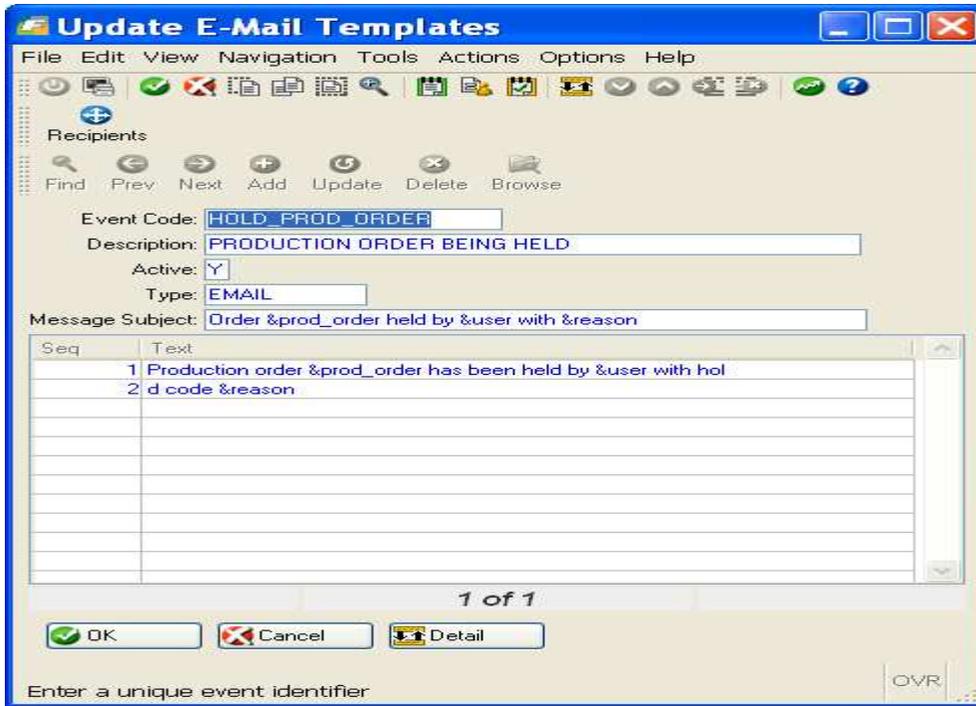
The screenshot shows a Windows-style dialog box titled "Extension r\_addr". It has a menu bar with "File", "Edit", and "Help". Below the menu bar is a toolbar with several icons: a power button, a printer, a checkmark, a red X, a document with a checkmark, a document with an X, a magnifying glass, a globe, and a question mark. The main area of the dialog is titled "Remit Address" and contains several text input fields: "Address1:" with the value "100 SPRING RD", "Address2:" with "STE 300", "City:" with "ATLANTA", "State:" with "GA", "Zip:" with "30339", and "Country:" with "US" and a dropdown menu showing "UNITED STATES". At the bottom left are "OK" and "Cancel" buttons. At the bottom right is a small box labeled "OVR". A footer note at the bottom left says "Enter the first line of the remit address."

## Feature 1805 Email Alerts for Held Production Orders

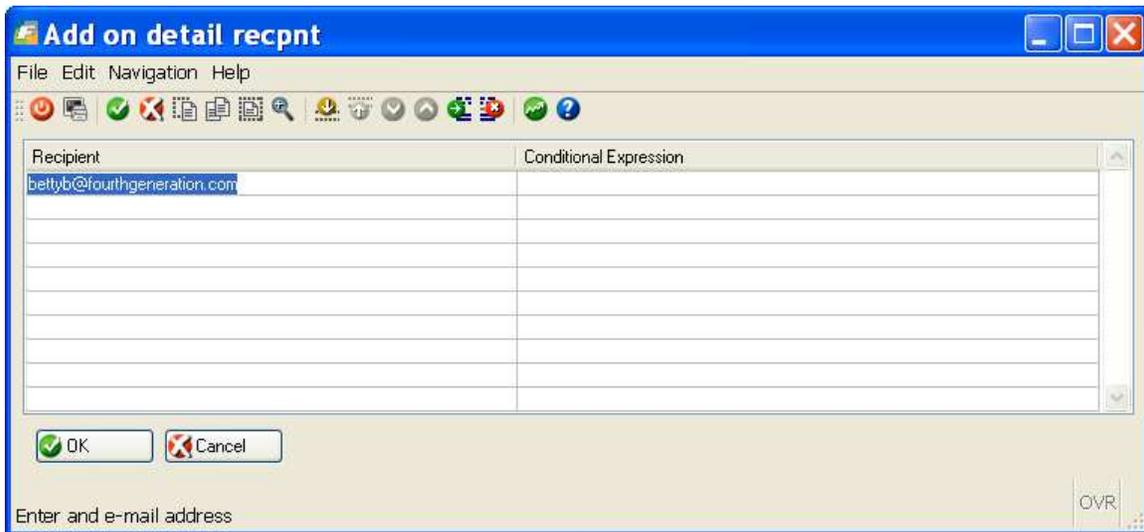
If a production order is placed on hold an email will be sent to the person defined as the contact in the Email Templates program. If the production order is linked to a sales order, an email will also be sent to the sales person assigned to that sales order.

### Update Email Templates ( menu path 7-1-k):

Please note that the email template below will be delivered with the software and is the only template available at this time. Future templates that may be needed will need to be coordinated with a programmer as there is some programming involved to extract the specific data needed using the special characters (ie- &) below.



Next click on the Recipient icon on the toolbar and enter the recipient's email address. The conditional expression field is reserved for future use and can therefore be left blank for now.



The mail addresses used must be internal company email addresses. Addresses not internal will require additional configuration by your IT department.

You must also make sure to enter an email address for every salesperson so that they too will receive emails for production orders put on hold that are linked to sales orders.

Menu path (3-2-4-c-j):

The screenshot shows a software window titled "Update Salesperson Definitions". The window has a menu bar with "File", "Edit", "View", "Navigation", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. A secondary toolbar contains "Find", "Prev", "Next", "Add", "Update", "Delete", and "Browse" buttons. The main area contains a form with the following fields:

- Salesperson Code:
- Salesperson Name:
- 
- 
- 
- Phone:
- Cell:
- Fax:
- Email:

At the bottom of the form area, it says "2 of 6". In the bottom right corner, there is a button labeled "OVR".