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Creating a Fax list for use by WinFax Pro

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Introduction

This document details how to create a report which can be used to generate a fax list for use by WinFax Pro.

Create a Report

We have to create a report in AI to give us the veterinarian information.

1. Go to report generator and locate the All Vets report (VETS).
2. Once up on the screen, click the SAVE AS button and rename the report to VETFAX, then edit the report description to read VET FAX LIST, or something unique for your practice.
3. Next, remove the column that displays the vet number. We don't need that. Just put your cursor anywhere on the line, and then click the red minus sign (not the red minus delete). Click the green Add button and add two columns to complete the address info. You should have Last Name, First Name, Address1, Address2, City, State, Zip code. Make sure you have enough space under width for these fields.
4. Next, click on the Link1 tab and select the Phone numbers table.
5. Click the filter button and choose category on the left side, = under relation, and number on the right side. Enter your fax category number in the matchbox and click ADD, then ok. It should look like this: (PHN_CAT=3). However, you need to verify that the phone category number is correct. To do this, go into picklists and look up the picklist called phone field labels. Check the link number for FAX, and make a correction if needed.
6. Next, click the green plus sign to add a column for your fax numbers. Choose the phone L1: Phone under table, and select Phone Number under field. The width needs to be 1.00 and the Title is Fax#. Save your report at this point.

Exporting from AI

Click the run button. You will get a list of all vets that have a specified fax number. This list can now be saved as a text file. To do this, click on the print symbol, and then check the box "Print to File". Choose the location to save to and give the file a name, such as vet fax list. Once it has been saved, click close. You are done in AI.

Importing to WinFax Pro

1. The next step is to import this saved file into Winfax Pro.
2. Open up Win Fax Pro. You need to create a folder under Phone books. Click on My Phone book, and then choose New. Give the folder a meaningful name, such as vetlist.
3. Next, click on File, Import, then choose phone book. Go with the default choice in the next window ASCII (text file). Click next, and navigate to where you saved your AI text file. Chose this text file, click Open, then next. Click next again.
4. The next window will show you the fields you have available for importing. Just pick the corresponding fields on the right side. For Hospital choose Company. When you are done with that part, click next. You will see the folder where you will import from. Make sure it's the correct one. Click Finish. You will see a small box letting you know how many recipient records were imported. Click ok you are done.
5. You can now compose your letter and choose to put all vets into a group for faxing. Consult your Win Fax Pro manual for further assistance on creating a fax group.