

# MasterTax

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These are notes for typical setup. For specific setup, please refer to the user manual.

**MUST USE NT40 PRINTER DRIVER** w/MasterTax (The driver is not applicable to the three-tiered ISP version of MasterTax).

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## Section 1: General Information

PrintBoss is an application that adds flexibility and features to the task of printing multi-part accounting documents on Laser printers. In spite of their superior print quality and speed, laser printers have introduced some new challenges with printing accounting documents. PrintBoss solves these problems by offering the following features:

- PrintBoss will print multiple copies of any document.
- Enable unique printing for each copy, such as a legend.
- Each copy can be printed in a different order, or to a different printer, or from different trays within the same printer.
- Allow signatures to be printed on checks with security.
- Print text or graphics based on conditions of the document (e.g. document amount).
- Document design can be enhanced.

## Section 2: MasterTax and PrintBoss interface

The MasterTax and PrintBoss interface is not typical because the PrintBoss printer driver is not used. Instead, the PrintBoss program is set up to look for a text file from MasterTax. Once the files are created, PrintBoss is loaded by MasterTax, it will process the text file(s) automatically, and then PrintBoss closes automatically.

In the special IP version of MasterTax, open PrintBoss after the files are created and PrintBoss will process the text file(s) automatically. PrintBoss must be closed manually as well.

In order for PrintBoss to read the text files, the installation will provide a "Text Capture File Specification". The Text Capture File Specifications are files PrintBoss utilizes to know the location of the MasterTax text file, how to process the files, capture assignments (if needed), and how to manage the text file after PrintBoss processes it. For MasterTax users, there is a matching PrintBoss form for each Text Capture File Specification.

Standard Check (Original version that has been replaced with the MTax2 set)

MTax1.pbf (form)

Mtax1.pbt (text capture file specification)

Standard Check and Garnishment Check

MTax2.pbm (form)

MTax2.pbt (text input file specification)

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### Section 3: Setup in MasterTax

MasterTax needs to be setup so that when it prints checks, it will call PrintBoss and include in the call the path of the text/data file and what printer to use.

- 1) Select "File / Preferences" from the main menu in MasterTax.
- 2) On the left side within the tree structure select "Configuration / Tax Disbursement"
- 3) Click on "Files".
- 4) Verify these settings in the top section of the right hand pane:
  - a. Set "Printing Software" to PrintBoss.
  - b. Set "Software Location" to the path where PrintBoss is installed.

### Section 4: Setup in Special IP version of MasterTax

MasterTax does not provide a file path to the PrintBoss driver to print checks in this three-tiered environment. Instead, it uses its File Export function to export the check batch to a designated folder and PrintBoss processes the checks from the designated location after it is opened manually.

- 1) Select "File / Files / Export / Files / Deposit Payment" from the main menu in MasterTax.
- 2) Click on "Check" within the "Select File Type" section on the left side of the window.
- 3) Click on "ASCII File" in the "Export" section on the bottom left side of the window.
- 4) Select the batches to export to PrintBoss.
- 5) Click "Submit" and enter the file path for the designated folder when prompted.

### Section 5: PrintBoss Settings

The following items are suggested for MasterTax interfaces. This may serve as an installation checklist if problems occur. This section is broken into 2 subsections: Required Settings (these MUST be done after the initial installation) and Other Common Settings.

#### A.) REQUIRED SETTINGS

##### ***File / Printer Setup***

Select the driver matching the Laser Jet printer. The PCL5e is recommended when available. Do not use a Post Script (PS) driver. DO NOT select the "PrintBoss" printer here. This setting is workstation specific.

##### ***Edit / Text Input File Specs / <highlight form> / Editor***

**\*\*MTax2\*\***

##### Settings Tab:

- |                                   |  |
|-----------------------------------|--|
| • <i>Specification Active</i>     | This must be checked.  |
| • <i>Auto Scan</i>                | This should only be checked after all other settings are made and tested. When this is selected, it will scan for the file, process and erase. |
| • <i>Text File Before Process</i> | During setup and testing set this to "Prompt for process if exists".   |
| • <i>Text File After Process</i>  | During setup and testing set this to "Do Nothing".   |
| • <i>Ignore-Line Macro</i>        | Leave at the default: <code>Substr("{LineVal}",1,1)&lt;&gt;"5" .or. Len("{LineVal}")&lt;898 .or. Len("{LineVal}")&gt;899</code>                |
| • <i>Form</i>                     | Set to MTax2.  |
| • <i>Bank</i>                     | {None}.  |

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### \*\*MTax1\*\*

#### Settings Tab:

- *Specification Active* This must be checked.
- *Auto Scan\*\** This should only be checked after all other settings are made and tested. When this is selected, it will scan for the file, process and erase.
- *Text File Before Process* During setup and testing set this to "Prompt for process if exists".
- *Text File After Process* During setup and testing set this to "Do Nothing".
- *Ignore-Line Macro* Leave at the default:  
`Substr("{LineVal}", 1, 1) <> "5" .or. Len("{LineVal}") <> 898`
- *Form* Set to MTax1.
- *Bank* {None}.

After all testing is finished, the Auto Scan can be selected.

### B.) OTHER COMMON SETTINGS

#### ***Edit / Form Files / (highlight form) / Editor***

\*\*Mtax2\*\*

\*\*Mtax1\*\*

#### Settings (Tab):

- *Copies* 0 (or increase to print copies)
- *Immediate Print Dialog Method* "Start printing w/out prompt"
- *Auto-Archiving* "Overwrite Work File at Start of Batch"

#### Special Controls (Tab):

If there are multiple users using PrintBoss and printer names and trays are set in the Multi-Part Settings tab (see Multi-Part Settings below), then the check box "Save Form's Printer Selections Locally" should be checked.

#### Multi-Part Settings (Tab):

- *Print Time* Set to "Immediate" for the Original. Review Auto-Archiving settings to avoid lost documents if this option is set to Batch. (See user manual or press F1 while viewing the Settings tab for more information).
- *Destination Printer* This option is used to send a copy to a designated printer other than the PrintBoss default printer.
- *Source Tray* Pulls the paper from the selected tray. This is based on the printer listed in the Destination Printer column. The tray names may change if the printer selection changes.
- *Copy Name* This is a user editable field to identify copies other than the Original.

## Section 6: Using PrintBoss with MasterTax

### **PRINTBOSS MUST BE CLOSED IN ORDER TO RUN CHECKS in the non-IP version of MasterTax.**

When the checks are ready to print, click on button 7 or 9 (Print Checks button) in the MasterTax screen. This will open a "Check File Print" screen. Within the "Checks Ready" tab, select the files to print and click on Print. When the "Print Setup" window appears, select the LaserJet printer you want to print to (NOT PrintBoss NT50 or NT40).

PrintBoss will do its processing in the background and print the checks.

\*\*If the Text Capture File Specification is not set to Auto Scan, then the operator needs to select "File / Process Input Files" for PrintBoss to scan for the existence of the input file.

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### Section 7: Using PrintBoss with special “IP” version of MasterTax

In the IP version of MasterTax, the MasterTax program is actually running on another computer (the one in the MasterTax data center) and is unable to launch PrintBoss. Instead, the Check Text files must be moved down to the local PC and PrintBoss needs to be started by the user. To prepare for this, the Text Capture File Specification in PrintBoss must be modified to identify a specific folder to scan for the Check Text files that come from MasterTax using the following steps:

- 1) Open PrintBoss and select “Edit / Text Input File Specs”.
- 2) Select the MTax1 or MTax2 spec and then click the Editor button.
- 3) Click on the “Capture Files” tab.
- 4) On a new line, enter a path that matches the Check Text file(s) location from Section 4 above. For example:

C:\MasterTaxChecks\Chk\*.txt”

- 5) Click on OK to save changes.

When the checks are ready to print, click on the Start menu and select PrintBoss or start PrintBoss from a shortcut on your desktop. PrintBoss will automatically begin processing any Chk\*.txt file(s) in the specified folder and print the checks.

\*\*If the Text Capture File Specification is not set to Auto Scan, then the operator needs to select “File / Process Input Files” for PrintBoss to scan for the existence of the input file.

### Section 8: Signatures

When a SigFile is passed in a field from MasterTax, the signature will print on the check. The sig file should be a BMP or JPG format and include either a full path or reside in the PrntBoss subdirectory called “Logos”.