Red Wing

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

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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

The PrintBoss application uses a special Windows Printer driver in order to interface with Red Wing. Once the appropriate settings are made in PrintBoss and Red Wing, sending a document to PrintBoss requires no extra steps for the user.

Section 2: Setup in Red Wing

To setup the PrintBoss printer in Red Wing, click on the Printers button at the bottom of each Printing screen. Define a user in the User field and select the PrintBoss Printer driver (PrintBoss 50) under the Printer field.

Red Wing Settings for Accounts Payable:
Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Invoices:
There are four different layouts that Red Wing allows for Invoices:
- Invoice
- Packing Slip
- Service
- UOM

In the AR-Print Invoices screen, there is a Transaction Type field. This should say INVOICE. Choose the Plain Paper option for all layouts. (i.e. Plain Paper- Invoice for printing an Invoice layout).

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Packing Slips:
There are two different layouts that Red Wing allows for Packing Slips:
- Packing Slip
- Unit of Measure (UOM)

In the OE-Print Packing Slips screen, there is a Form Type field (under Output Options section). Choose the Plain Paper option for both layouts. (i.e. Plain Paper – Packing Slip for printing a Packing Slip layout).

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Payroll Checks:
The only Red Wing settings that affect PrintBoss are: "Stub Location", "Print Check Numbers", and "Print Company Name".

Stub Location must be: "Stub-Check-Stub"
Print Check Numbers: Must be checked
Print Company Name: Must be checked

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Liability Checks:
The only Red Wing settings that affect PrintBoss are: "Stub Location", "Print Check Numbers", and "Print Company Name".

Stub Location must be: "Stub-Check-Stub"
Print Check Numbers: Must be checked
Print Company Name: Must be checked

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Purchase Orders:
There are three different layouts that Red Wing allows for Purchase Orders:
- Product
- Vendor Item ID
- Service.

In the AP-Print Purchase Orders screen, be sure that the Transaction Type (under the PO Type section) is set to Purchase Orders. For the Form Type field, choose the Plain Paper option for all layouts. (i.e. Plain Paper-Product for printing a Product layout).

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Statements:
There is only one setting layout that Red Wing allows for Statements. Under the Form Type field, choose Plain Paper.

Be sure to print to the PrintBoss printer driver.

Red Wing Settings for Work Orders:
There are three different layouts that Red Wing allows for Work Orders:
- Product
- Service
- Unit of Measure (UOM).

In the OE-Print Orders screen, there is a Form Type field (under Output Options section). Choose the Plain Paper option for all three layouts. (i.e. Plain Paper – Product if printing a product work order layout.)

Be sure to print to the PrintBoss printer driver.

Section 2: Setup in PrintBoss
The following items are suggested for Red Wing interfaces. This may serve as an installation checklist if problems are occurring. This section is broke into 3 subsections: Required Settings (these MUST be done after the initial installation), Checklist, 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 NT50 printer as the printer from the PrintBoss application.

Edit/Bank List

Beginning with PrintBoss version 5.71.1, PrintBoss includes bank Wizards to make the setup easier. Simply click on Wizards and choose 'Bank Creation'. Each screen has instructions and suggestions specific to Red Wing. You will be prompted to add a Logo or Signatures after the bank specific portion is completed.

PrintBoss comes with 10 bank accounts in the Standard edition. If more is needed, a Bank Key disk will need to be purchased. Call Wellspring Software, Inc., for more information.

Primary Tab:
- *Bank Code*   Enter a word or phrase to identify this bank/company combination.
- *Bank Prompt*   Enter any word or phrase for user recognition.
- *Bank Name and Address*   Fill in the bank information as it should appear on the checks.
- *Company Name and Address*   Fill in the company information as it should appear on the checks.
- *Next Check Number*   DO NOT fill in. The check number comes from Red Wing.
- *Confirm Check Number*   "Auto…".

MICR Tab:
- *Routing Number*   Enter the bank account routing number.
- *Account Number*   Enter the bank account number. Use a period to designate a space.
- *Check Number*   {CChkNo} or CCCCCC

Signature_Logos Tab
This tab is used if there is a signature or logo based on a PrintBoss Bank record. For these instructions, go to our website www.wellspringsoftware.com and visit our Support Documents page.

B.) CHECKLIST

Options/ PrintBoss Driver Settings
- *Transfer Folder/File*   {ComAppData\...\Transfer}\{WinUserName}
- *Append to Transfer File*   Do Not Check
- *Load PB32.exe*   Checked
- *Configuration Settings Save Location*   Local_User Registry (Standard)
- *Capture Mode:*   Always Trigger
- *PB50 Driver Special Settings/Spool Dir* {ComAppData\...\Spool}

Click OK when finished.

Options/Configurations
Please visit our website www.wellspringsoftware.com for specific install steps if you are on a Citrix or Terminal Server environment.

Settings Tab
- *MICR offset adjustment*   Use if needing to adjust the MICR line placement. This field is work station and user specific. Default values are 0.
- *Set Globally*   Checked
- *Work File Private Folder Names*   {WinUserName}
- *Always Trigger/Capture Settings*
  - Form   {ReqList}
  - Bank   (Grayed out)
  - PB#INFO flag overrides above Checked
  - Allow Fragmented PB#INFO line Checked

Options/Form/Bank Request List

During installation, entries for Red Wing are added to this list. If there are no entries available, either run the SETUP.EXE file again as an update or import the entries by clicking on the Import button. The request list files are stored in the PRNTBOSS\REQLIST\REDWING folder.

For AP and Payroll, change the Bank field from {DocBank} to either the specific bank or to {Request} if using multiple bank accounts. If {Request} is used, a bank list will appear when printing.

For any invoices, the BANK field should be set to {NONE}.

C.) OTHER COMMON SETTINGS

Edit/Forms ... (highlight form) … Editor

RW_AP1 for AP checks; RW_PR1 for Payroll checks; RW_INV2 for invoices; RW_PO2 for Purchase orders; RW_STMT2 for statements; RW_ORD2 for orders; RW_PS2 for Packing Slips

Settings Tab:
- *Copies*   0 = just the original (increase to print copies).
- *Auto-Archiving*   Typically set to "Overwrite work files at start of batch". If printing copies, please refer to the manual for more details

Multi-Part Settings Tab:
These settings are work station and user specific when<Locally> is selected under "Printer & Tray Selections Saved In…" at the bottom of this tab.

- *Print Time*   Original set to "Immediate". If copies are set to batch, research archiving method settings to avoid lost documents. (See user manual).
- *Source Tray*   Pulls the paper from the selected tray. This is based on the current printer in the PrintBoss program. The tray names may change if the printer selection changes.
- *Destination Printer*   May be used to send designated copy to a printer other than the PrintBoss default printer. This field is also used for other PrintBoss functions, such as Emailing, Faxing, and creating PDF files.

Section 3: Using PrintBoss with Red Wing

Once Red Wing and PrintBoss have been setup according to the instructions above, then print to PrintBoss the needed document(s). PrintBoss should load. If printing a check and the bank in the request list was set to {Request}, a bank list will appear. Choose the correct bank, click on OK, and PrintBoss will proceed.