

# Sage 100 ERP

Formerly known as Sage ERP MAS 90 and Sage ERP MAS 200

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These are notes for a typical setup. For specific setup, please refer to the user manual. The user manual is available at <https://www.wellspringsoftware.com/Support/DynamicSupport/Directory.aspx>. Select the Manuals folder in the left navigation pane. The documents will display in the right pane. Choose 'PrintBoss Standard-Enterprise Manual' for this product.

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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 SAGE 100 ERP. Once the appropriate settings are made in PrintBoss and SAGE 100 ERP, sending a document to PrintBoss requires no extra steps for the user.

## Section 2: Setup in SAGE 100 ERP

Print checks to the "PrintBossNT40" or "PrintBoss 50" printer. Do not print any other type of document to this printer.

### AP checks

Select the form type: "Standard- Stub/Check/Stub"

Use Preprinted Laser format under Description

"Graphical" format ... should NOT be selected (located on the Accounts Payable Options Forms tab)

### Payroll checks

Select the form type: "Laser- Stub/Check/Stub" (the default check report should have a line count of 63)

## Section 3: PrintBoss Settings

The following items are suggested for SAGE 100 ERP interfaces. This may serve as an installation checklist if problems occur. This section is broke into 3 subsections: Required Settings (these MUST be done after the initial installation), Checklist, and Other Common Settings.

### 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 SAGE 100 ERP. 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 SAGE 100 ERP.
- *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

Signatures & 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](http://www.wellspringsoftware.com) and visit our Support Documents page.

**OPTIONS/FORM/BANK REQUEST LIST**

During installation, entries for SAGE 100 ERP 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\MAS90 or PRNTBOSS\REQLIST\MAS200 folder.

The Bank field defaults to {Request}. A bank list will appear for each check run to select a bank if this is not changed.

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 Capture
- *PB50 Driver Special Settings/Spool Dir* {ComAppData\...\Spool}

Click OK when finished.

**OPTIONS/CONFIGURATIONS**

Please visit our website [www.wellspringsoftware.com](http://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 Name* {WinUserName}
- *Always Trigger/Capture Settings*
  - Form {ReqList}
  - Bank (Grayed out)
  - PB#INFO flag overrides above Checked
  - Allow Fragmented PB#INFO line Checked

Click OK when finished.

COTHER COMMON SETTINGS

**EDIT/FORMS ... (HIGHLIGHT FORM) ... EDITOR**

M90\_AP1 or Mas90AP2 = AP Checks

MAS90PR2 = Payroll checks (non-graphical format)  
 M200AP1 = AP Checks  
 M200PR1 = Payroll checks (graphical format)  
 SGMASAP1 = AP Checks

Settings Tab:

- *Copies* 0 = just the original (increase to print copies).
- *Immediate Print Dialog Method* "Start printing w/Out prompt".
- *Auto-Archiving* Typically set to "Overwrite work files at start of batch". If printing copies, please refer to the manual for more details.

Multi-Parts & Printers 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 4: Using PrintBoss with SAGE 100 ERP**

When printing checks, PrintBoss will open automatically. PrintBoss will open a "Form Bank Request" list – this allows the user to indicate the type of check being printed (AP vs. Payroll). Then, a second pop-up will appear asking which bank to use. Once a selection is made, PrintBoss will print the checks.

**Section 5: Setting up for more automatic bank selection**

Normally, PrintBoss will pop up a list of bank accounts for the user to select at the start of a check run. This can be automated by making a small modification to the check reports in SAGE 100 ERP. Inside of SAGE 100 ERP from the check printing screen, select "Forms / Details". Find the Company Name field, and adjust the settings so it WILL print. On the AP check set the location of Line 35, Tab 1. Go to Line 34, Tab 1, on the Payroll check. Click on the Options menu in PrintBoss and choose Form/Bank Request List. Edit each of the two SAGE 100 ERP entries. In both cases, change the bank from {Request} to {DocBank}. If you have more than one bank account for AP in a given company, check the box in each of those records in PrintBoss that is labeled "Always Confirm Auto Bank Selection".