

There are MANY times when text is captured from the host accounting software and formatted or specifically placed on the PrintBoss Form before it is printed. For example:

- The check number in a check is added to the MICR line.
- The bank account data in a check is used to automatically select a bank record in PrintBoss.
- An E-mail address or a fax number is captured and used in sending the document.
- The value of a check is examined to determine the appropriate signature(s) to print on the check.
- Distribution methods are defined so PrintBoss can conditionally e-mail, fax, or print.

This chapter explains in general the three methods for assigning data, although these methods are fundamental to many tasks in Form design. All the methods assign the value of the captured text to an arbitrary variable name in PrintBoss. The variable name can be used in various ways by enclosing it in braces and adding it to expressions in a PrintBoss Form. For example:

```
#Text 7, 1, Arial/14/B, "{DocNo}"
```

This expression prints the document number in the top right corner of the page, assuming it is captured and assigned.

METHOD 1: PRINTBOSS TRIGGER (USE OF PB#INFO)

The PrintBoss Trigger is only used for passing four very common pre-defined variable names, DocNo, DocAmnt, DocRecip, and DocMisc, to PrintBoss. It can ALSO communicate the name of the Form and the Bank Code for PrintBoss to use. This method requires the ability to edit the accounting software report content in order to properly add the PB#INFO expression. The syntax follows:

PB#INFO <FORM>, <BANK>, <DOCNO>, <DOCAMNT>, <DOCRECIP>, <DOCMISC>, <DOCMISC2>

The PB#INFO MUST BE CAPITALIZED. Delimiters such as quotes, double quotes, or brackets are not required, but are recommended for some of the variables to avoid confusion when a comma occurs in the data, such as the thousands separator in the amount.

Only the first parameter, Form, is required. So the simplest use of this command might be:

PB#INFO MYFORM

The whole expression will be blanked out after PrintBoss processes the information. The expression should be on a line all by itself, though it can be any size font and can occur anywhere on the page. Here is an example of a line that would print from the accounting software:

```
PB#INFO MyChk1, "CHECKING 1", "100456", "1,456.23", "ACME ELECTRIC", "527-0012"
```

Of course, this is the expression after it is evaluated and all the variables are replaced by data. The evaluation occurs after the report is printed from the accounting software. The actual content might be similar to the following, although the actual syntax and field names are dependent on your report writer:

```
"PB#INFO MyChk1, "+  
  "[ "+ db.BankCode + "]," +  
  "[ "+ db.CheckNo + "]," +  
  "[ "+ db.Amount + "]," +  
  "[ "+ db.Payee + "]," +  
  "[ "+ db.VendorFaxNo + "]," +
```

```
“[“+ db.VendorEmail + “]”
```

The six assigned variables used in this method can be referenced in any PrintBoss script.

METHOD 2: EXPLICIT VARIABLE ASSIGNMENT WITHIN THE ACCOUNTING SOFTWARE REPORT

Define a field in the source report to pass the assignment to PrintBoss if you have the ability to edit the accounting software report. It is important that the variable is just ONE field. This usually means you must create a variable in the source report that uses a combination of text and database fields. The resulting field must be similar to the following example:

```
PB#Assign FaxSvcFaxNo, [636-527-0012]
```

This is the field after it is evaluated and the text and database fields are replaced with data. The actual content might be similar to the following, although the actual syntax and field names are dependent on your report writer:

```
"PB#Assign FaxSvcFaxNo," + CustomerDB.ContactFaxNo
```

This expression *must be on a line all by itself*, though it can be any font size or color and occur anywhere on the page. For example, you can print a series of assignments very close together using a 4 point font. Once PrintBoss sees each line, it will automatically assign the value to the variable name suggested and remove the expression before printing.

The variables assigned in this method can only be referenced in the RunTime Objects section of PrintBoss when *Pre-Process Assignments* is checked on the *Special Controls* tab of the Form.

METHOD 3: CAPTURED FROM THE PRINTED DOCUMENT BASED ON COORDINATES

This method requires the value that needs to be captured and assigned by PrintBoss is displayed somewhere on the source report. PrintBoss can blank out the data after it is captured (if desired).

Verify the value appears in the document sent by the accounting software before setting up the assignment. This may entail opening the accounting software's report writer, finding the field in its databases, and inserting it somewhere on the report. It is very important that the data ALWAYS appears at the same location from page to page. This usually means inserting the field into the Header or Footer sections of the report.

Print a document to PrintBoss once the value appears in the report. The form PrintBoss selects must be clearly defined. See the *Custom Interface* Training Notes for more information if it is unclear.

After PrintBoss has received a print job, open PrintBoss.

1. Click on the **File** menu and select **Open Document Work Files**.
2. Select the appropriate work file and click the **Browse** button.
3. Select a document and click the **View** button.
4. Right click anywhere in the view and select *View Raw Capture* from the pop-up menu. This view displays the actual text printed from the accounting software with no formatting from PrintBoss.
5. Locate the text field on the screen containing the desired captured value.
6. Double click on the beginning of the field to open the **Captured Text Command Properties** dialog.
7. Select the **Click to Assign to Variable** bar in the top right of the dialog. The **Assign Command Properties** dialog opens.
8. Replace **ReNameMe** in the **Variable Name** field with your own variable. For example: PayeeName.
9. Check **Capture Raw Text Objects Only**. A description of some of the other options follows:
 - a. Some reporting engines (such as the latest Crystal Reports) tend to break up the text fields into smaller contiguous fields. A good practice is to click the +/- button for the **Horizontal** field to change the coordinate range. This toggle button changes from +/- to **'to'**. Set the ending

- coordinate far enough to the right to pick up the longest imaginable value without overlapping unrelated fields.
- b. **Add together fields in horizontal range** – Select this option whenever the +/- variance is replaced with "to" to treat the extended range as one variable.
 - c. **Trim choices applied after segments appended** – PrintBoss can trim the left and right sides of each field. Select this option to trim the appended field when *Add together fields in horizontal range* is selected.
 - d. **Left Trim** and **Right Trim** – Check these options to remove leading and trailing spaces in a field.
 - e. **Blank Out After Capture** – Select this option to hide the raw data. The data will display elsewhere on the Form by using a #Text command.
 - f. **Substr of Value** – Select a starting character in the field and a length if the field is actually a long string and you only need to use part of the data.
10. Click **OK** when you are finished assigning properties to your variable. Variables assigned in the View are automatically inserted at the top of RunTime Objects in the Form.
 11. **Close** the Properties dialog.
 12. Right click on the raw view and deselect **View Raw Capture** to return to the formatted view.
 13. Right click anywhere on the View and choose **Insert an Object / Text**. The **Text Command Properties** dialog opens.
 14. Enter your variable in the **Text** field enclosed in brackets. For example: {PayeeName}. You may change properties and add conditions as needed. Commands added to the View are automatically inserted at the end of Footer Objects in the Form.
 15. Click **OK** when you are finished.
 16. **Close** the View when you are finished and click *Yes* to save changes.

The variables assigned in this method can only be used in RunTime Objects of PrintBoss when *Pre-Process Assignments* is selected on the *Special Controls* tab of the Form.

ASSIGNING BLOCKS OF TEXT

Normally assigned text is a single line of data. Assignments made using #AssignS may contain multiple lines of text with each line separated by a Carriage Return / Line Feed. A few commands accept and process multi-line variables as multiple lines, such as the #VText command.

EXAMINING ASSIGNED VARIABLES

It can be very helpful to review a list of all the variables that have been assigned in a Form. Right click on a View from either the Form Editor or the work file Browser and select *Display Assignments*. The *Form Assignments* dialog opens. The assignments that are currently defined will show up grouped by category. Note that some of the categories such as *E-mail Fields* or *Fax Service Fields* have variables that may not be assigned. They are listed because they are pre-defined and will be used in a specific way by PrintBoss if they are assigned.

View variables assigned in a specific script by clicking on the plus sign in front of *Assignments made in form*. The subcategories will identify where the variables are assigned, such as *Assigned in Form's Runtime Section* or *Assigned in Captured text*. Navigate to the designated script or back to the accounting software (in the case of *Captured text*) to make adjustments to these assignments.