

# HAB

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

## Section 2: Setup in HAB

Print checks to the "PrintBoss NT40" or "PrintBoss 50" printer. Do not print any other type of document to this printer. For each of the check types a standard report should be used from HAB. Please contact HAB to be sure you are using their standard report for each of the following check types:

**AP checks** : Stub / Stub / Check

**Payroll checks** : LargeStub/Check or HMS Payroll Check (not stub/stub/check)

**Land Lord checks** : LargeStub/Check

The default setup will result in the list of bank accounts popping up at the start of each batch of checks, in order for the operator to select the correct one. (Sort of like choosing the correct pre-printed check stock to load in the printer if you were using pre-printed check stock.) A modification can be made to enable automatic selection of the bank account. See Section 5.

## Section 3: PrintBoss Settings

The following items are suggested for HAB interfaces. This may serve as an installation checklist if problems occur. This section is broken 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 HAB. 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 HAB.
- *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](http://www.wellspringsoftware.com) and visit our Support Documents page.

**Options/Form/Bank Request List**

During installation, entries for HAB 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\ReqList\HAB 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.

**B.) CHECKLIST**

**Options/ PrintBoss Driver Settings (Standard PrintBoss only)**

- *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
- *PB 50 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.

## C.) OTHER COMMON SETTINGS

### ***Edit ... Forms ... (highlight form) ... Editor***

HAB\_AP2 = AP Checks

HAB\_PR1 = Payroll checks

HAB\_LL1 = Landlord Checks

#### Settings (Tab):

- *Copies*      0 (or increase if wanting to print copies)
- *Immediate Print Dialog Method*      "Start printing w/Out prompt"
- *Auto-Archiving*      "Overwrite Workfiles 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*      For 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 printer other than the PrintBoss default printer

### ***Edit...Bank List***

#### Signature Logos Tab

This tab is used if there is a signature or logo based up a PrintBoss Bank record. For these instructions, go to our website [www.wellspringsoftware.com](http://www.wellspringsoftware.com) and visit our TechNotes page.

## **Section 4: Using PrintBoss with HAB Software**

When printing checks, PrintBoss will open automatically. A list of banks will popup so that the operator can select the right bank account. Once a selection is made, PrintBoss will print the checks.

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

Normally, PrintBoss will popup 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 HAB. Anything that appears in the top 1/2inch of the page will be selected and blanked out. PrintBoss will then use this value to match with a bank code. Normally this value should be at least the company name, and additionally the account name if there are more than one accounts per company.