

Sage 100 Contractor Formerly known as Sage Master Builder

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.

Contents

- 1) General Information
- 2) Setup in Sage 100 Contractor
- 3) PrintBoss Settings
- 4) Using PrintBoss with Sage 100 Contractor

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 can print multiple copies of any document.
- PrintBoss can 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.
- PrintBoss can provide security to printing signatures on checks.
- PrintBoss can 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 Contractor. Once the appropriate settings are made in PrintBoss and Sage 100 Contractor, sending a document to PrintBoss requires only a few extra steps for the user.

Section 2: Setup in Sage 100 Contractor

CHECK SETUP

Choose the Stub/check/stub style of check for A/P checks. Select the following on the Report Printing screen:

- Select Printer to Print Checks to: "PrintBoss 50"
- Select Preprinted Form Type: "Stub/Check/Stub" or "Check 11"
- Select 600x600 for the Quality.
- Print Check Number ON Check: YES

Section 3: PrintBoss Settings

The following items are suggested for the Sage 100 Contractor interface. 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.

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.

DO NOT select the PrintBoss NT50 printer as the printer from the PrintBoss application.

EDIT / BANK LIST

If printing vendor checks and payroll checks from the same bank account, you must enter the account in the PrintBoss list twice - once for vendor checks and once for payroll checks.

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 Master Builder. 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 (vendor checks) Enter a word or phrase to identify this bank/company combination.
- Bank Prompt (vendor checks) Enter any word or phrase to help you recognize this account.
- 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.
- Fractional Code Fill in the fractional code for this bank.
This number often follows the pattern 12-345/678
- Next Check Number DO NOT fill in. The check number comes from Master Builder.
- Confirm Check Number at start of batch "Auto .."
- Always Confirm Auto Bank Selection Select this option when:
 - Payroll is run for this checking account
 - More than one company runs checks from this account

MICR Tab:

- Routing Number Enter the bank routing number.
- Account Number Enter the bank account number.
- Check Number {CchkNo} or CCCCCC or CCCCCCCC

Miscellaneous Tab:

- Misc Flag 1 Check this box if this account should always have a second LINE for signatures.
- Canadian Style Date/Amount Check this box if the CPA06 standards should apply to this account.

Signatures & Logos Tab:

This tab is used if there is a signature or logo based on a PrintBoss Bank record. For more specifics, visit the Support Documents page on our website www.wellspringsoftware.com .

OPTIONS / FORM/BANK REQUEST LIST

Entries for Sage 100 Contractor are added to this list during installation. If no entries are available, run SETUP.EXE from the PrintBoss Home Directory as an update or import the entries by clicking the Import button. The request list files are stored in the PRNTBOSS\REQLIST\ReqList\Master Builder 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
- Configurations Settings Save Location Local_User Registry (Standard)
- Capture Mode Always Capture
- PB50 Driver Special Settings/Spool Dir {ComAppData\...\Spool}

Click OK when finished.

OPTIONS / CONFIGURATION

If on a Citrix or Terminal Server environment, please visit the Support Documents page of our website www.printboss.com for specific install steps.

Settings Tab:

- MICR offset adjustment Use if needing to adjust the MICR line placement. This field is workstation, user, and printer specific. Default values are 0.
- Set Globally Checked
- Work Files Private Folder Name {WinUserName}

- Always Capture Settings
 - Form {ReqList}
 - Bank (Grayed out)
 - PB#INFO Overrides Above Checked
 - Allow fragmented PB#INFO line Unchecked, unless you are also using Accpac

Click OK when finished.

OTHER COMMON SETTINGS

EDIT / FORMS / (highlight form) / EDITOR

MB_AP1 = AP Checks

Settings Tab:

- Copies 0 (or increase if more copies are needed)
- Immediate Print Dialog Method Suggested setting is "Start printing w/out prompt"
- Auto-Archiving Completed Records Default is set to Overwrite Work File at Start of Batch. Click on the drop down menu to make a different selection. Choices with "0" will display a Days till Archiving option to allow you to choose a specific number of days.

Multi-Parts & Printers Tab:

These settings apply to the Form unless the Printer & Tray Selections Saved In.. option is set to Independent. Press the F1 key while viewing this tab to learn more about the save options.

- 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.

Click OK when finished.

Section 4: Using PrintBoss with Sage 100 Contractor

When checks are printed from Sage 100 Contractor, print to the "PrintBoss NT40" or "PrintBoss 50" printer driver. PrintBoss will open automatically and prompt the user to select the correct bank account. This can be automated by making a small modification to the check report in Master Builder. Anything that appears on the lower third of the page will be selected and blanked out. This is a good area to place a unique identifier for the bank. PrintBoss can be set to compare the identifier value with the Bank Codes to determine a match. Normally this value is the Company name and, if possible, the checking account name. The checking account name is helpful when there is more than one checking account per company.