Sage 50 Canadian Edition
Formerly known as Sage Simply Accounting

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 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 allow signatures to be printed on checks with security.
- PrintBoss can print text or graphics based on conditions in 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 50 Canadian Edition. Once the
appropriate settings are made in PrintBoss and Sage 50 Canadian Edition, sending a document to PrintBoss requires no extra steps for
the user.

Section 2: Setup in Sage 50 Canadian Edition

Within Simply, click on the Setup menu and select Reports and Forms. Then follow the settings for the appropriate module below.

SAGE 50 CANADIAN 2013 & 2014
PAYMENT CHECKS/CHEQUES
- *Printer:*   PrintBoss 50
- *Style:*   *Custom*
- *Form Type:*   Sage 50 Form
     Payment Cheque
- *Font:*   Arial
- *Size:*   8 or 10

PAYROLL CHECKS/CHEQUES
- *Printer:*   PrintBoss 50
- *Style:*   *Custom*
- *Form Type:*   Sage 50 Form
     Payroll w/YTD Totals 2 Stubs Easy Align
- *Font:*   Arial
- *Size:*   8 or 10

SAGE 50 CANADIAN 2012
PAYMENT CHECKS/CHEQUES
- *Printer:*   PrintBoss 50
- *Style:*   Preprint

- *Form Type:*   Sage 50 Form
                            Payment Cheque
- *Font:*   Arial
- *Size:*   8 or 10

PAYROLL CHECKS/CHEQUES
- *Printer:*   PrintBoss 50
- *Style:*   Preprint
- *Form Type:*   Sage 50 Form
                            Payroll w/YTD Totals
- *Font:*   Arial
- *Size:*   8 or 10

PRIOR TO SAGE 50 CANADIAN 2012

PAYROLL CHECKS/CHEQUES (TAB)
- *Printer:*   PrintBoss 50
- *Style:*   Preprint
- *Form Type:*   8 ½ x 7 in. (either 13 or 7 character source number)
                            8 ½ x 7 in (short source) (Simply Canadian 2004 and later)
- *Font:*   Arial
- *Size:*   8 or 10
- *Top Margin:*   0.00
- *Left Margin:*   0.00

NOTE: The Short Date format must be used for the reports.   This is changed under Settings/Company/Date Format.   This can only be changed by signing is as a single-user with the administrative login.

PAYMENT CHECKS/CHEQUES (TAB)
- *Printer:*   PrintBossNT40 or PrintBoss 50 (depending on the workstation operating system)
- *Style:*   *Preprint*
- *Form Type:*   8 ½ x 7 in. (either 13 or 7 character source number)
                            8 ½ x 7 in (short source) (Simply Canadian 2004)
- *Font:*   Arial
- *Size:*   8 or 10 (if running Simply version 8.5 or later, size must be 10)
- *Top Margin:*   0.00
- *Left Margin:*   0.00

NOTE: The Short Date format must be used for the reports.   This is changed under Settings/Company/Date Format.   This can only be changed by signing is as a single-user with the administrative login

Click OK to exit.

Section 3: PrintBoss Settings

The following items are suggested for the Sage 50 Canadian Edition 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 or PCL6 driver is recommended when available. Do not use a Post Script (PS) driver.   DO NOT select the "PrintBoss" printer here.   This setting is workstation specific.

EDIT / BANK LIST
Beginning with PrintBoss version 5.71.1, PrintBoss includes bank Wizards to make the setup easier.   Just click on Wizards and choose 'Bank Creation'.   Each screen has instructions and suggestions specific to Sage 50 Canadian Edition.   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   A word or phrase to identify the account
- Bank Prompt   Same as Bank Code or any other word or phrase for user recognition.
- Bank Name and Address   Fill in the bank information for this bank record.
- Company Name and Address   Fill in the company information for this bank record.
- Confirm Check Number at start of batch   "Auto.."

MICR Tab:
- Routing Number   Enter the bank account routing number
- Account Number   Enter the bank account number
- Check Number   {CchkNo} or CCCCCC

Miscellaneous Tab:
- 2nd Signature Line   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 when a signature or logo is associated with a PrintBoss Bank record.   For more specifics, refer to the user manual.

CHECKLIST
OPTIONS / PRINTBOSS DRIVER SETTINGS
- Transfer File   {ComAppData\...\Transfer}\{WinUserName}
- Append to Transfer File   Unchecked
- 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 / CONFIGURATIONS
If on a Citrix or Terminal Server environment, please visit 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 specific. Default values are 0.
- Set Globally   Checked
- Work Files Private Folder Name   {WinUserName}
- Always Trigger/Capture Settings
  - Form   {ReqList}
  - Bank   (Grayed out)
  - PB#INFO Overrides Above   Checked
  - Allow fragmented PB#INFO line   Unchecked
  - Alt frag method   Not visible

Click OK when finished.

OPTIONS / FORM/BANK REQUEST LIST
During the installation, PrintBoss creates request list entries for Sage 50 Canadian Edition. The request list files are stored in the PRNTBOSS\REQLIST\SIMPLY folder.

The BANK field is set to {Request} by default. This will require the user to select the bank each time a batch of checks is run.

OTHER COMMON SETTINGS
EDIT / FORMS / (highlight form) / EDITOR

SIM_AP2 = Accounts Payable prior to Sage 50 Canadian 2012
SIM_AP3 = Accounts Payable for Sage 50 Canadian 2012 and above
SIM_PR2 = Payroll prior to Sage 50 Canadian 2012
SIM_PR3 = Payroll for Sage 50 Canadian 2012
SIM_AP4 = Payroll for Sage 50 Canadian 2013

Settings Tab:
- Copies   0 (or increase if wanting copies)

Multi-Part Settings Tab:
These settings are workstation / user specific if the "Save Form's Printer Selections Local" box is checked on the "Special Controls" tab.

- Print Time   For Original set to "Immediate".   Research archiving method settings to avoid lost documents when Copies is set to batch.   (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

Section 4: Using PrintBoss with Sage 50 Canadian Edition

When checks are printed from Sage 50 Canadian Edition, print to the PrintBoss printer driver. The PrintBoss program will load and prompt the user to select a bank account. Once the user selects the appropriate account, PrintBoss will print the check to the designated printer.