

## **Sage 500 ERP** Formerly known as Sage ERP MAS 500

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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 500 ERP. Once the appropriate settings are selected in PrintBoss and SAGE 500 ERP, sending a document to PrintBoss requires no extra steps for the user.

### **Section 2: Setup in SAGE 500 ERP**

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

#### **AP CHECKS**

Select the form type: "Stub Stub Check"

### **Section 3: PrintBoss Settings**

The following items are suggested for SAGE 500 ERP interfaces. This may serve as an installation checklist if problems are occurring. This section is broken into 3 subsections: Required Settings (these MUST be done after the initial installation), Check List, 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 500 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 500 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

Miscellaneous Tab:

- *2<sup>nd</sup> signature line* Check this box to have a 2<sup>nd</sup> signature line print for all checks that use this account.
- *Canadian Style Date/Amount* Check this box to have the date and amount formatted for the special Canadian requirements. This is for all checks that use this account.

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 500 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\MAS500 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

OTHER COMMON SETTINGS

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

M500ap1or M500ap2 = 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 & Printer 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 500 ERP**

Print the "Stub Stub Check" format to the PrintBoss printer driver when printing checks. The PrintBoss program will normally open automatically. PrintBoss will prompt the user to select which bank to use. Once a selection is made, PrintBoss will print the checks.

For additional information, please see tech notes available on our web site at [www.printboss.com](http://www.printboss.com) or our User Manual.

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

To enable automatic bank selection, the Crystal report used for checks needs to be modified. Be sure to select the correct report. Once the report is opened, place the cursor on the line just above the amount in words. Insert the database field called "CompanyName" (make sure it is wide enough to show all company names. Then to the right of the new field insert a second field which is a database field called "BankID".

One setting needs to be changed inside of PrintBoss. Click on the Options menu and select Form/Bank Request List. Locate the record that calls the form M500\_AP1 or M500\_AP2, whichever you are using. Edit the record and change the bank from {Request} to {DocBank}.

In operation, the list of banks will be displayed the first time you use each bank account. Once it has been "trained", it will automatically pick that bank account in the future.