Training Notes

E-mailing with Sage Accpac   January 12, 2012

This document provides instructions for modifying the Accpac Crystal report and corresponding PrintBoss form in order to use the e-mailing function in PrintBoss. For instructions on how to setup the e-mail function in PrintBoss, please refer to the Wellspring Software Training Note: "PrintBoss E-mail Settings" (Document number: Q1034). For detailed information on capturing and assigning text, please see the Wellspring Software Training Note: "Capturing and Assigning Text" (Document number: Q1031).

Communicating   Instructions to PrintBoss

There are three ways for Accpac to give instructions to PrintBoss.

1. The PrintBossTrigger
2. The PrintBoss #Assign/#Assigns Commands
3. Capture data from the raw report and assign a variable.

PrintBossTrigger

The PrintBossTrigger is a formula on a Crystal report that is designed to communicate specific data elements to PrintBoss. In the most current versions of PrintBoss there are seven specific data elements. They are:

1. Form
2. Bank
3. Document Number
4. Document Amount
5. Document Recipient
6. DocMisc
7. DocMisc2

When viewing a report in Preview, you should see all the data expected AND the visible PrintBossTrigger with the rendered formula values. Here is an example of what a PrintBossTrigger looks like on the screen (note that it is truncated here to fit the document):

```
PB#INFO [CA_AP1], [SEATAC:Sample Company Inc.],[8],[***12.96],[Gould Manufactur
```

If you do not see the PrintBossTrigger on your document, you will need to confirm that it is set to be VISIBLE in your Crystal Report.

If the PrintBossTrigger formula is set to be visible, yet does not appear on the SCREEN, it implies that one or more of the formulas in the PrintBossTrigger formula have an error.

When PrintBoss processes the trigger it recognizes and uses the data in the trigger in the order received, i.e. form name is always first, bank is always second, etc. Variable #6, DocMisc, is often used to communicate a FAX number; and Variable #7, DocMisc2, is used to communicate an email address.

The first step to setting up e-mailing is to edit the PrintBossTrigger in the Crystal report. Open Crystal to edit the formula called PrintBossMisc2 to reference the field that holds the email address.

> **NOTE:**
>
> The Crystal reports do not always reference the same field for an e-mail address.
> - UP-CK3_V60.rpt and UP-CK4_V60.rpt use EMAIL.
> - OE-Pi1_v60.rpt and OE-Pickship1_v60.rpt use EMAIL1.
> - AR-IV1_V60.rpt; OE-CO1_v60.rpt; OE-IV2_v60.rpt and OE-IV5_v60.rpt use EMAIL2.

The next step is to assign the e-mail address in the PrintBoss. There are two ways to link the e-mail address.

1. Edit the PrintBoss form and add the following line in the top of RunTime Objects section of your PrintBoss form:

   #Assign EmailTo, "{DocMisc2}"

   Note that using this method, {DocMisc2} has a limit of 60 characters.

2. Edit the Options\E-mail Settings\ Misc. Settings tab. Check the box 'Use "DocMisc2" as EmailTo address if EmailTo is unassigned' as shown below:
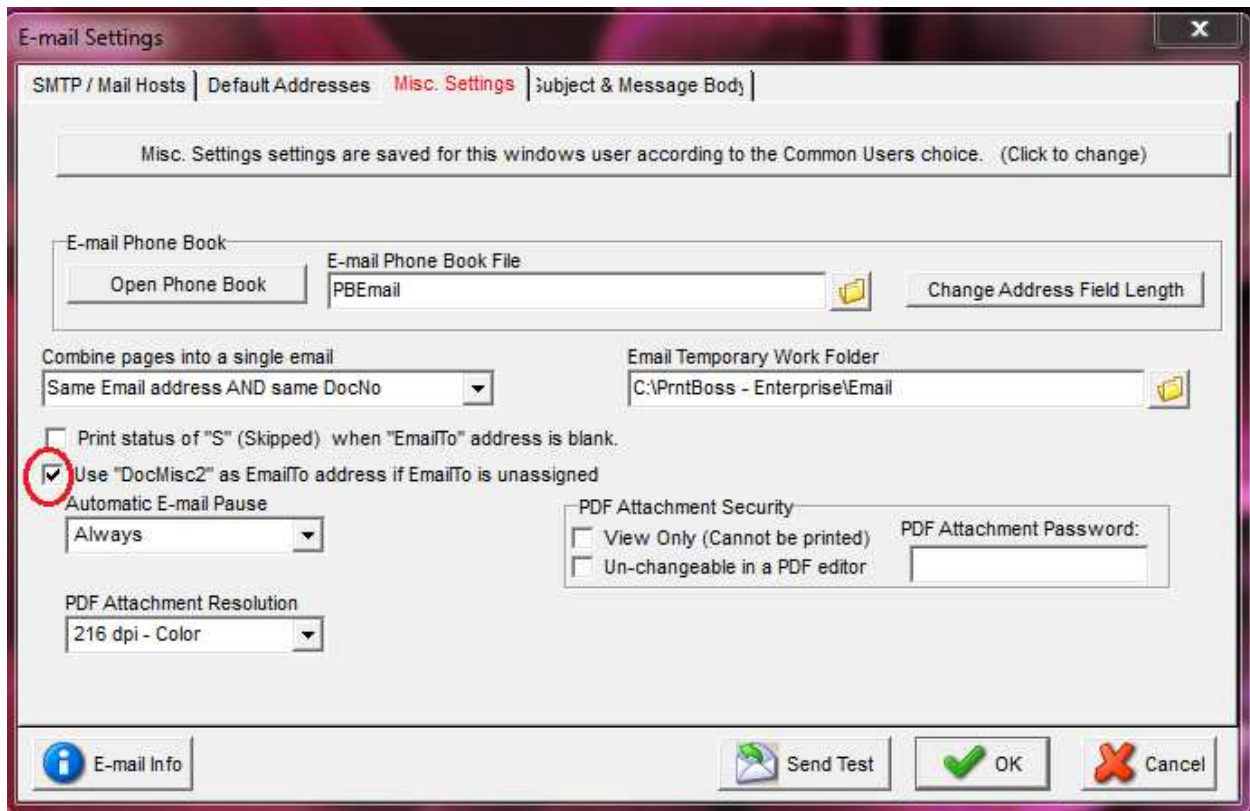
Explicit variable assignment within the Crystal report

Another way to communicate an e-mail address to PrintBoss is to define a field in the Crystal report to pass the data to PrintBoss. 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 examples:

PB#Assign EmailTo [suzie@cpa.com]

PB#Assigns EmailTo, suzie@cpa.com; jim@cpa.com; mary@cpa.com

The examples show what the field would look like after it is evaluated and the text and database fields are replaced with data. Note that there is no character limit when using this method.

The expression **must be on a line all by itself**, though it can be in any font size or color. It also must be in the Page Header or Footer to accommodate multiple page documents**.** 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.

NOTE:

> The variables can be referenced on either the RunTime or Footer Objects tab. When assigned in the RunTime Objects section of PrintBoss form, *Pre-Process Assignments* must be checked on the *Special Controls* tab of the Form.

Once the Crystal report has been processed and printed to PrintBoss, PrintBoss will evaluate the assignment and process the e-mail. .

Captured from the printed document based on coordinates

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

Open the Crystal report and insert the e-mail address field 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 Page Header or Page Footer sections of the report. Verify the e-mail address appears in the document by previewing it in Accpac. Next print the document to PrintBoss.

After PrintBoss has received the print job, open PrintBoss and go to the Work File view using the following instructions:

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 e-mail address on the screen.
6. Double click on the beginning of the e-mail address 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 EmailTo.
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. It is a good practice 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.

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  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. Click **OK** when you are finished.
14. **Close** the View when you are finished and click '*Yes'* to save changes.

NOTE:

The variables can be referenced on either the RunTime or Footer Objects tab. When assigned in the RunTime Objects section of PrintBoss form, *Pre-Process Assignments* must be checked on the *Special Controls* tab of the form.

Creating an E-mail Copy to the PrintBoss Form

The PrintBoss E-mail feature is enabled on a form-by-form basis. To create an e-mail copy:

1. Open the PrintBoss Master Application.
2. Click on the **Edit** menu and select **Form Files**.
3. Highlight the form you want to e-mail and click the **Editor** button.
4. Increment **Copies** by 1 on the **Settings** Tab. This new copy will be treated as the E-mail copy.
5. Select the **Multi-Parts & Printers** tab.
6. Set the **Destination Printer/Device** for the new copy to **< Email>**. An E-Mail button will appear at the top of the View for this form.
7. Click **OK**.

Modifying the Form Script for Special Conditions

Included in many of the PrintBoss forms are special lines of script relevant to emailing advices. They are commented by default, but can be activated at any time.

NOTE:

The script assumes that the employee email address has been passed in the Crystal Report formula field "PrintBossMisc2"

It also assumes that Copy 0 is the live check, Copy 1 is for a printed advice, and Copy 2 is the emailed advice.

To edit the form go to the Settings tab, change the number of copies to 2 and in Multi-Parts & Printers tab change the destination of Copy2 to Email. The following lines appear on the Footer Objects tab. The relevant lines can be activated by deleting the vertical bar in front of the #.

Processing Script Lines

|#[Copy,0]ProcessPage «[!Inu,"Non-Neg", {NonNegLabel}]» |Print this if it is a live check

|#[Copy,1]ProcessPage «[Inu,"Non-Neg", {NonNegLabel}][Empty,{DocMisc2}]» |Print if DD check and there is no e-mail addr

|#[Copy,2]ProcessPage «[Inu,"Non-Neg", {NonNegLabel}][!Empty,{DocMisc2}]»|Print if DD check and there is an e-mail addr

|#Assign EmailPDFAlias, «Payroll Advice for {DocRecip}»

|#Assign EmailPDFPassword, «{SSN}»

|#Assign EmailSubject, "Payroll Advice"

|#Assigns EmailBody, "Dear {DocRecip},"

|#Assigns EmailBody, "Please see the attached Payroll Advice for information about payroll funds deposited."

|#Assigns EmailBody, "The attachment is locked and requires your SSN (including dashes) to unlock."

|#Assigns EmailBody, " "

|#Assigns EmailBody, "Thank you, Payroll Dept.