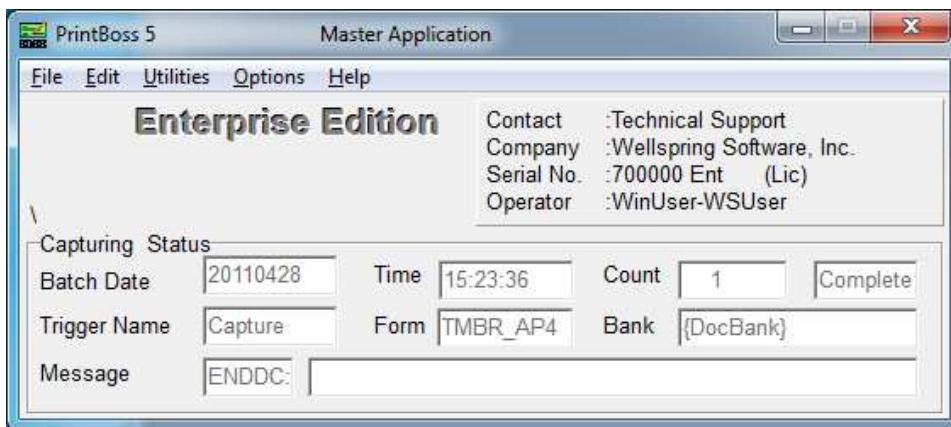


Adding a field to the Check Face

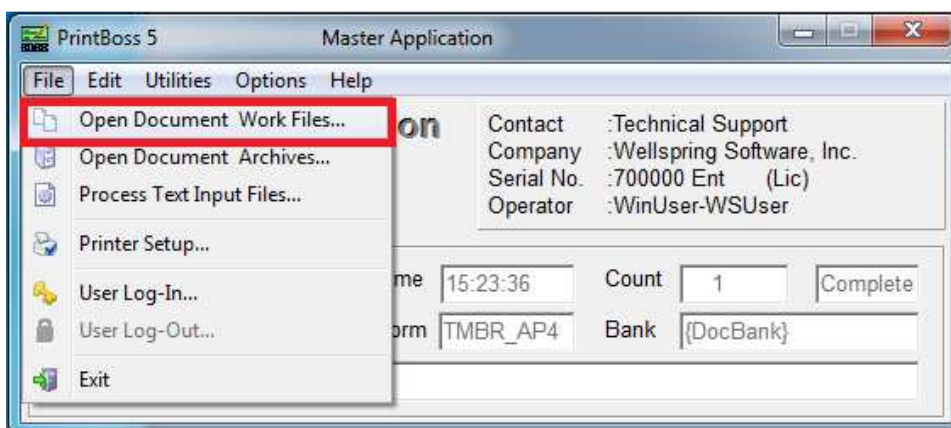
1 May 2011

All of the data required for a PrintBoss check has been transferred from the Host Accounting software or added by PrintBoss, There may be instances, however, when you may want to add information to your check report and have it also added to the PrintBoss check. An example of this might be a Vendor Number. One way to do this is to highlight the information, capture it as variable element and then place it on the check face.

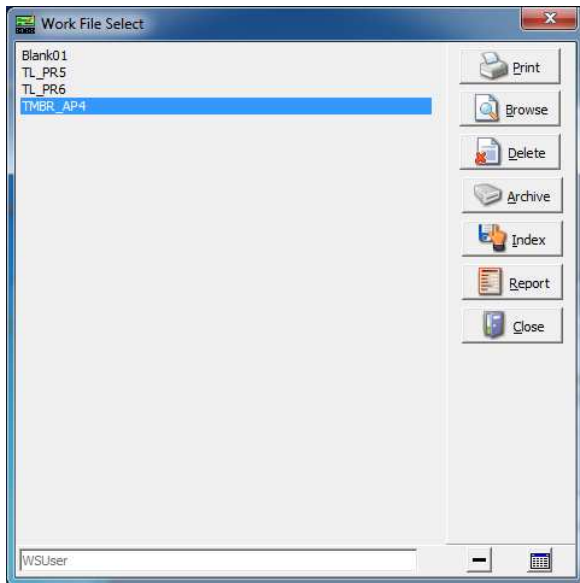
The easiest way to do this is to first send a check report with the new data element to PrintBoss as you normally do and then open PrintBoss to the Master Application screen.



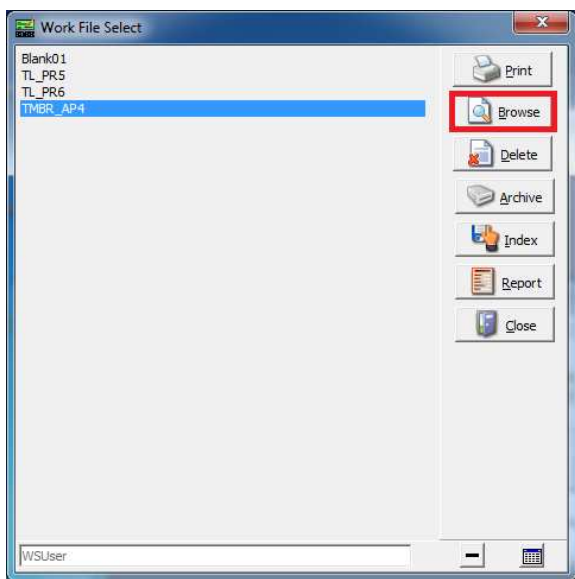
Select File > Open Document Work files.



The Work File Select screen will open and display a list of the different check styles you have used:



Select your check form then click on BROWSE (button)



A list of checks most recently printed through PrintBoss will display.

File Browse :C:\PrntBoss\Work\WSUser\TMBR_AP4

1 / 7

Natural Order

View Print Close

Batch		Document		DocNo	Form	Printed	Recipient	Misc (Fax)
Date	Time	Date	Time					
2011-04-26	10:29:47	2011-0...	10:29:48	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:20:19	2011-0...	10:20:20	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:28:24	2011-0...	10:28:41	24436	TMBR_...	P	A-1 Electric Company	
2011-04-28	09:57:53	2011-0...	09:57:54	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:16:59	2011-0...	15:16:59	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-28	15:21:07	2011-0...	15:21:07	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:23:36	2011-0...	15:23:36	24437	TMBR_...	P	Jackson Heating & A/C	

Choose the last record in the list.

File Browse :C:\PrntBoss\Work\WSUser\TMBR_AP4

7 / 7

Natural Order

View Print Close

Batch		Document		DocNo	Form	Printed	Recipient	Misc (Fax)
Date	Time	Date	Time					
2011-04-26	10:29:47	2011-0...	10:29:48	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:20:19	2011-0...	10:20:20	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:28:24	2011-0...	10:28:41	24436	TMBR_...	P	A-1 Electric Company	
2011-04-28	09:57:53	2011-0...	09:57:54	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:16:59	2011-0...	15:16:59	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-28	15:21:07	2011-0...	15:21:07	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:23:36	2011-0...	15:23:36	24437	TMBR_...	P	Jackson Heating & A/C	

Click on View:

File Browse :C:\PrntBoss\Work\WSUser\TMBR_AP4

7 / 7

Natural Order

View Print Close

Batch		Document		DocNo	Form	Printed	Recipient	Misc (Fax)
Date	Time	Date	Time					
2011-04-26	10:29:47	2011-0...	10:29:48	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:20:19	2011-0...	10:20:20	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-27	10:28:24	2011-0...	10:28:41	24436	TMBR_...	P	A-1 Electric Company	
2011-04-28	09:57:53	2011-0...	09:57:54	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:16:59	2011-0...	15:16:59	999999999	TMBR_...	P	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
2011-04-28	15:21:07	2011-0...	15:21:07	24405	TMBR_...	P	City of Beaverton	
2011-04-28	15:23:36	2011-0...	15:23:36	24437	TMBR_...	P	Jackson Heating & A/C	

This opens an image of the formatted check:

View of TMBR_AP4

90 0 6.64, 6.26 0. 7/7 E-mail Close

1 2 3 4 5 6 7 8

Vendor: Jackson Heating & A/C
5-20-09 54353 8000.00 800.00 7200.00

Chk. Date	4-28-10	Chk. No.	24437	Totals	8000.00	800.00	7200.00
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Wellspring Software
110 S. Spring St.
Manchester, MO 63011
(800) 800-8581
www.WellspringSoftware.com

Bank of Missouri
St. Louis, MO
26-366 875/100

Date: April 28, 2010
Amount: \$7,200.00

PAY TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukee, OR 97546

Seven thousand two hundred dollars and no cents

** COPY **

Wellspring Software
Vendor: Jackson Heating & A/C
5-20-09 54353 8000.00 800.00 7200.00

INVOICE DATE	INVOICE NO.	DESCRIPTION	INV. AMOUNT	DISC/T. TARGE	BALANCE
5-20-09	54353		8000.00	800.00	7200.00

Chk. Date 4-28-10 Chk. No. 24437 Totals 8000.00 800.00 7200.00

Wellspring Software
110 S. Spring St.
Manchester, MO 63011
(800) 800-8581
www.WellspringSoftware.com

Bank of Missouri
St. Louis, MO
26-366 875/100

Date: April 28, 2010
Amount: \$7,200.00

PAY TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukee, OR 97546

Seven thousand two hundred dollars and no cents

Your Signature

PO321129P 112455795100E 830-600P

0 / 192

RIGHT click anywhere inside this view to open a dialog box:

The screenshot displays the Wellspring Software interface. At the top, there are navigation controls including a page number '90', a search field with '0', and a status bar showing '3.65, 4.13'. A toolbar contains navigation arrows and an 'E-mail' icon. Below this is a yellow header bar with a grid of numbers 1 through 8. The main content area shows a check image for 'Wellspring Software' with check number '24437' and date 'April 28, 2010'. The check is payable to 'Jackson Heating & A/C' for the amount of '\$7,200.00'. A context menu is open over the check image, listing various actions such as 'Edit Current Object', 'Delete Current Object', 'Show "Form Objects"', and 'Exit then Edit Form'. The menu items are as follows:

- Edit Current Object
- Delete Current Object (Del)
- Comment Current Object
- Insert an Object (▶)
- Show "Form Objects"
- Show Blanked Captured Text
- Show Info Panel (Ctrl+I)
- View Raw Capture (Ctrl+R)
- View Request List Capture Groups
- Display Assignments (Alt+A)
- Exit (Alt+X)
- Exit then Edit Form (Ctrl+Alt+X)

Select the option "View Raw Capture":

The screenshot displays the Wellspring Software interface for check capture. At the top, there are navigation controls including a page number '90', a '0' in a box, a value '3.65, 4.13', and a '0' in a box, along with navigation arrows and a page count '7/7'. An 'E-mail' icon is also present. Below this is a yellow header bar with numbers 1 through 8. The main content area shows a check capture form for 'Wellspring Software' with 'Vendor: Jackson Heating & A/C'. The form includes a table with columns for 'INVOICE DATE', 'INVOICE NO', and 'DESCRIPTION'. The 'INVOICE DATE' is '5-20-09' and 'INVOICE NO' is '54353'. Below the table, there are fields for 'Chk. Date' (4-28-10) and 'Chk. No.' (24437). A 'PAY' section contains the amount 'Seven thousand two hundred dollars and no cents'. A context menu is open over the 'View Raw Capture' option, which is highlighted with a red border. The menu items include: 'Edit Current Object', 'Delete Current Object' (Del), 'Comment Current Object', 'Insert an Object', 'Show "Form Objects"', 'Show Blanked Captured Text', 'Show Info Panel' (Ctrl+I), 'View Raw Capture' (Ctrl+R), 'View Request List Capture Groups', 'Display Assignments' (Alt+A), 'Exit' (Alt+X), and 'Exit then Edit Form' (Ctrl+Alt+X). A red 'SAMPLE' watermark is visible across the form.

This removes all the PrintBoss formatting and shows only what was sent from the accounting software:

90 0 1.82, 0.51 Show Assigned Fields 9/9 Close Print

.....1.....2.....3.....4.....5.....6.....7.....8.....

5-20-09	54353		8000.00	800.00	7200.00
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4-28-10	24437		8000.00	800.00	7200.00
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First Timberline Construction

56124

Pay: *****Seven thousand two hundred dollars and no cents

April 28, 2010 24437 \$*****7,200.00

Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97546

Click on the field that was added to the check report, it will highlight in light blue:

90 0 5.24, 4.04 Show Assigned Fields 9/9 Close Print

1 2 3 4 5 6 7 8

5-20-09	54353		8000.00	800.00	7200.00
4-28-10	24437		8000.00	800.00	7200.00

First Timberline Construction

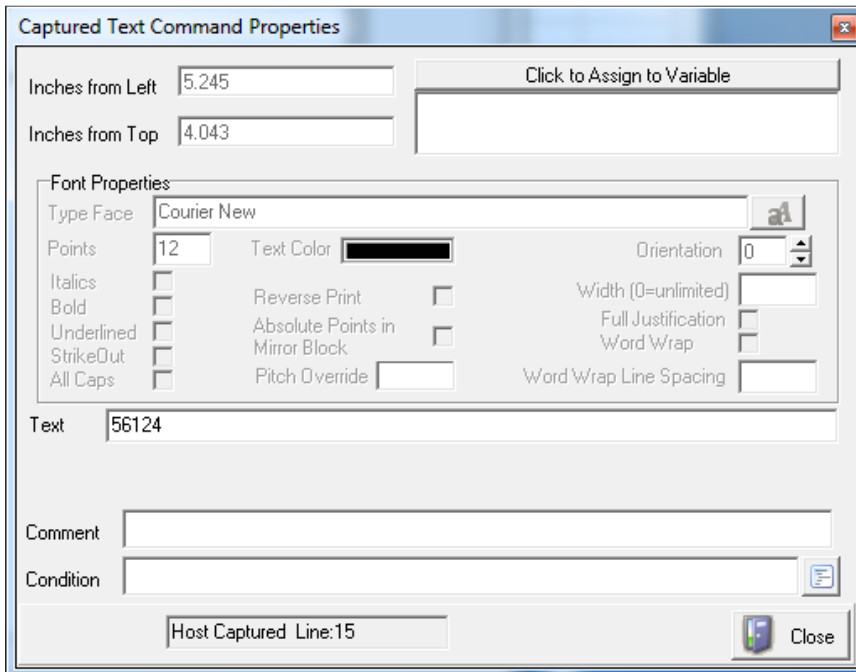
56124

Pay: *****Seven thousand two hundred dollars and no cents

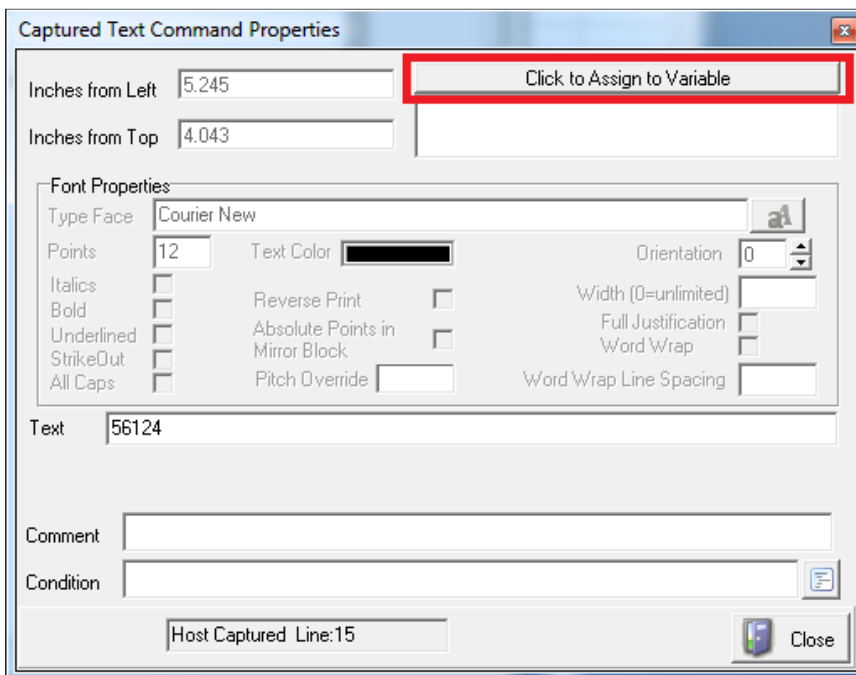
April 28, 2010 24437 \$*****7,200.00

Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97546

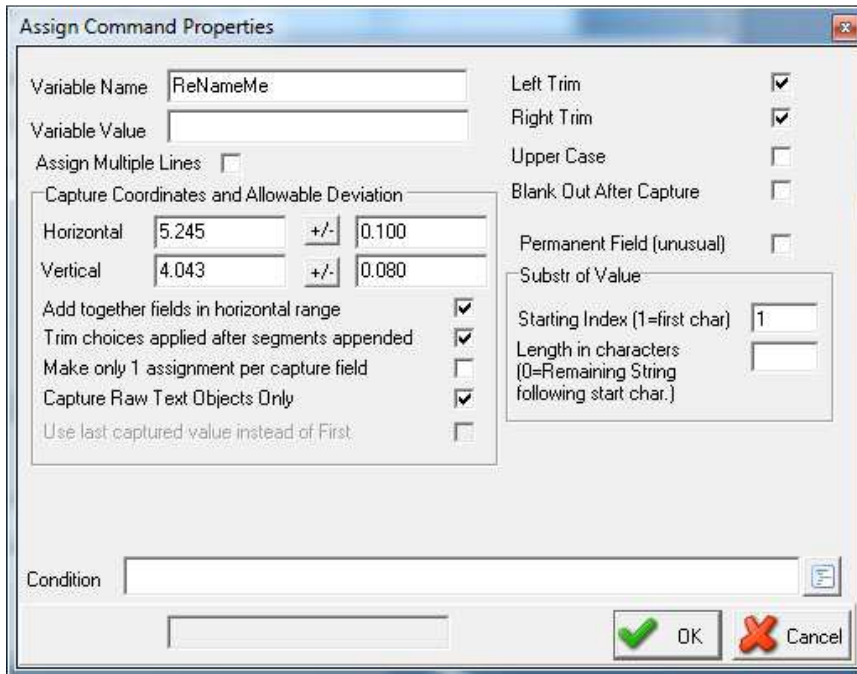
Double click on the highlighted field to open the dialog box:



Click on the button to Assign a Variable:

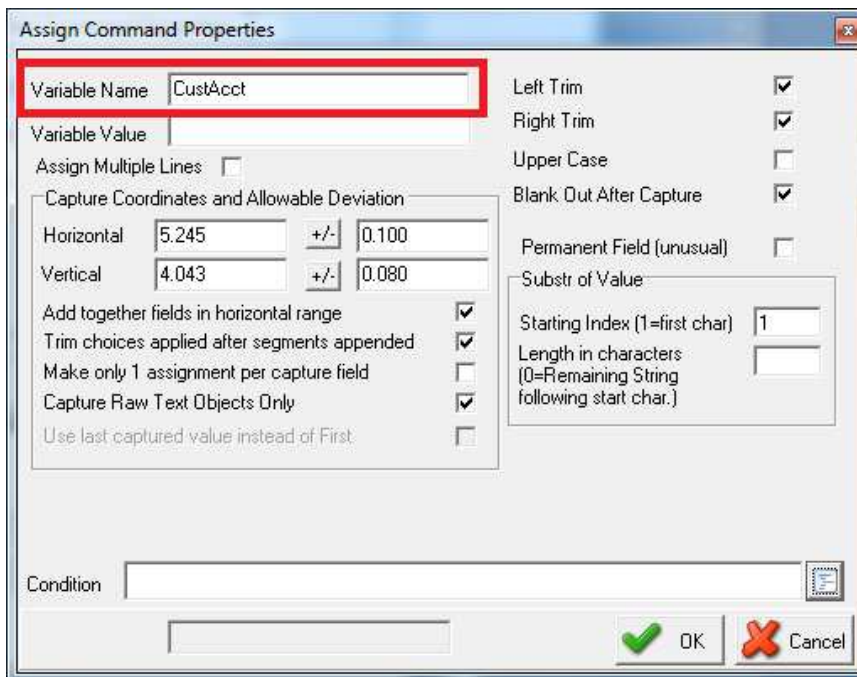


A new dialog opens:

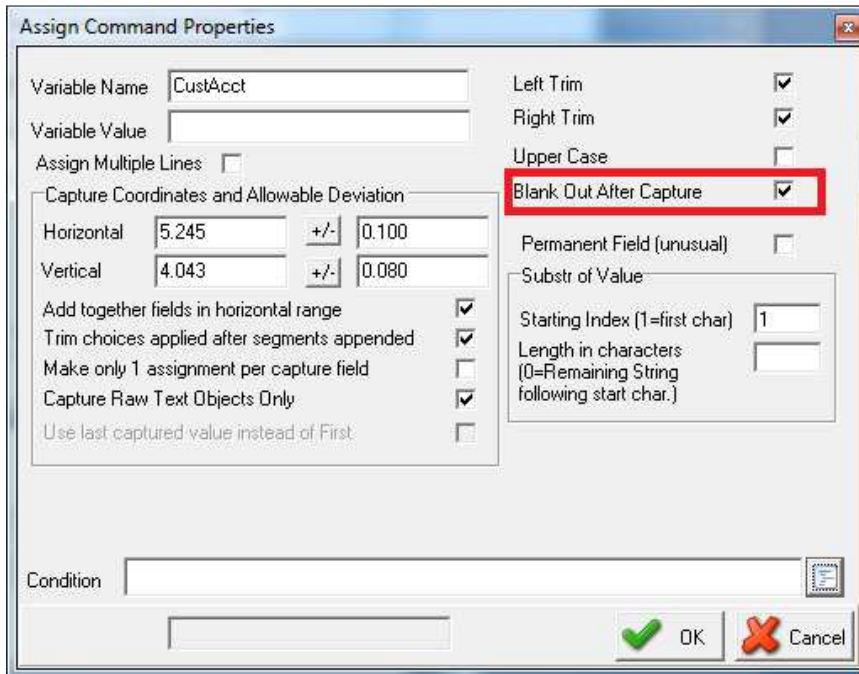


Change the 'Variable Name' from 'Rename Me' to a field name of your choice. Do not use spaces.

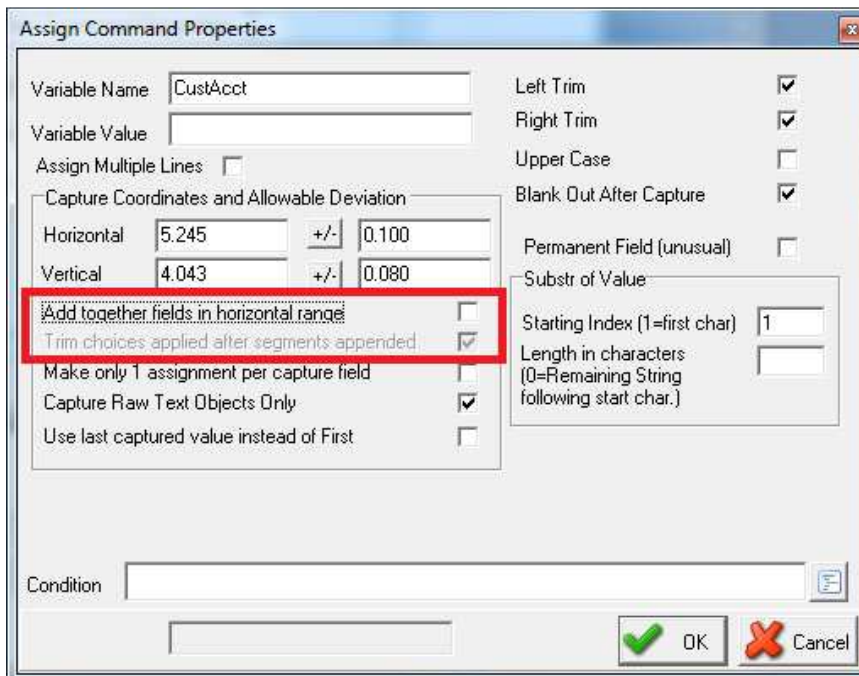
The 'Variable Name' is not case sensitive. The example uses "CustAcct" to indicate Customer Account:



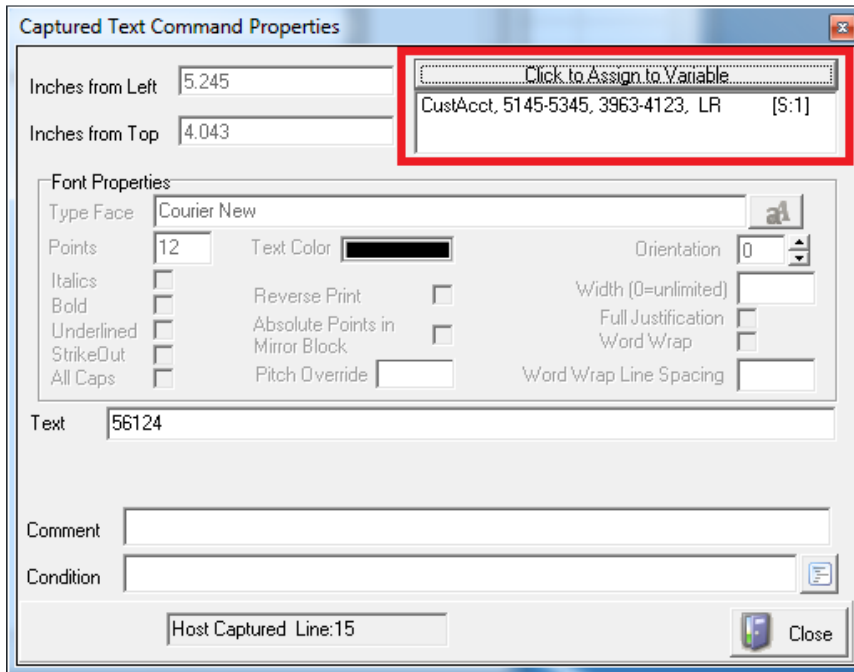
Check the "Blank Out After Capture" box:



Uncheck the "Add together fields in horizontal range" box:



Click on OK. This will take you back to the first dialog where you'll see the new assignment listed:



Click on Close. This will take you back to the view of the data.

RIGHT Click. Un-check the "View Raw Capture" option. You will have the formatted view of the check:

View of TMBR_AP4

90 0 0.24, 4.60 0 9/9 E-mail Close

1 2 3 4 5 6 7 8

Chk. Date	4-28-10	Chk. No.	24437	Totals	8000.00	800.00	7200.00
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Wellspring Software
Manchester, MO 63011
(800) 600-6861
www.WellspringSoftware.com

Bank of Missouri
St. Louis, MO
99-888875196

24437
Date April 28, 2010
Amount \$7,200.00

PAY *****Seven thousand two hundred dollars and no cents

TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97548

** COPY **

Wellspring Software
Vendor: Jackson Heating & A/C
Check Date: April 28, 2010

INVOICE DATE	INVOICE NO.	DESCRIPTION	INV. AMOUNT	DISCNT TAKEN	BALANCE
5-20-09	54353		8000.00	800.00	7200.00

Chk. Date	4-28-10	Chk. No.	24437	Totals	8000.00	800.00	7200.00
-----------	---------	----------	-------	--------	---------	--------	---------

Wellspring Software
445 Sovereign Court
Manchester, MO 63011
(800) 600-6861
www.WellspringSoftware.com

Bank of Missouri
St. Louis, MO
99-888875196

24437
Date April 28, 2010
Amount \$7,200.00

PAY *****Seven thousand two hundred dollars and no cents

TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97548

Your Signature

⑆024437⑆ ⑆6365276100⑆ ⑆30⑆500⑆

12 / 192 0.250, 4.600 rid 0.25[], 4.6, 8.25, 7.1, 0.84, 1.9, 4.4, 5.6, 6.7*,,, /R.1 /_T.

Put your mouse roughly where you want the new field to appear on the formatted check.

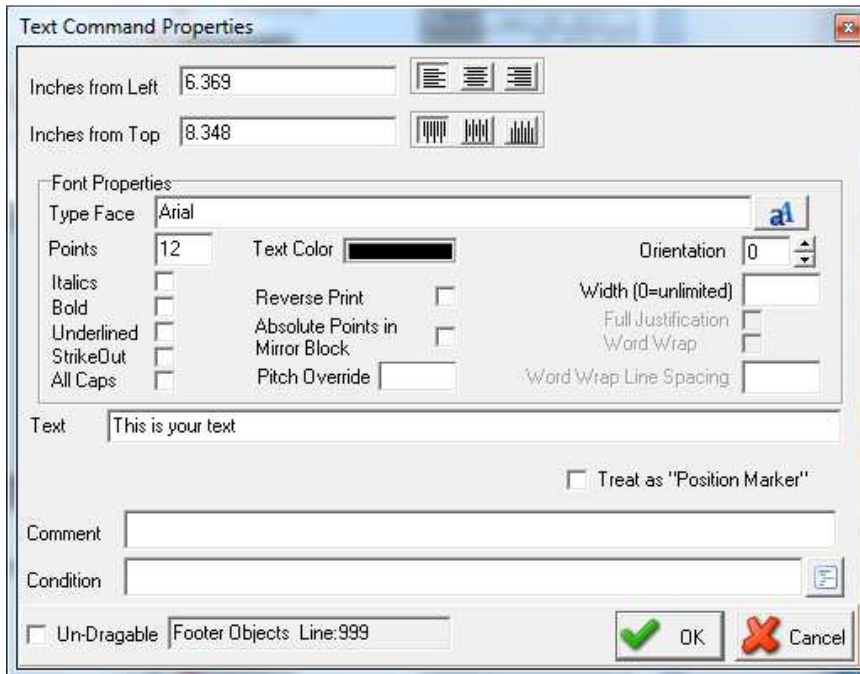
RIGHT Click. Choose "Insert an Object":

The screenshot shows a check form for 'Ispring Software' with invoice number 54353 and amount 8000.00. A context menu is open over the check, listing options like 'Edit Current Object', 'Delete Current Object', and 'Insert an Object'. The 'Insert an Object' option is highlighted with a red box. Other options include 'Show Form Objects', 'Show Blanked Captured Text', 'Show Info Panel', 'View Raw Capture', 'View Request List Capture Groups', 'Display Assignments', 'Exit', and 'Exit then Edit Form'.

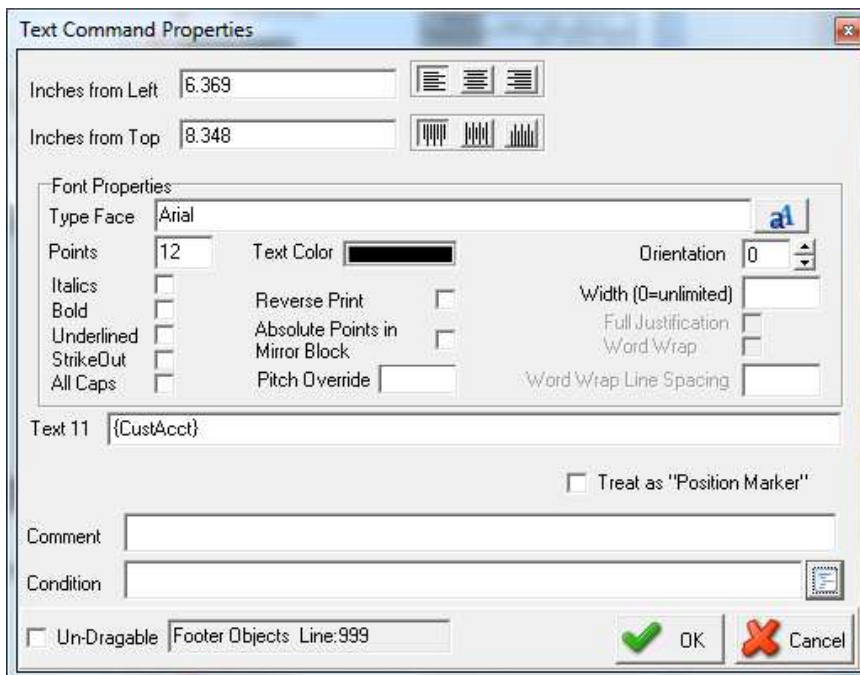
Select 'Text':

The screenshot shows a check form for 'Wellspring Software' with invoice number 54353 and amount 8000.00. A context menu is open over the check, listing options like 'Barcode', 'Block', 'Canadian Date', 'Graphic', 'Grid - Relative', 'Grid - Horizontal', 'Grid - Vertical', 'Line', 'Rectangle', 'Secure Seal', 'Signature', 'Text', 'Text - Multi-Line/Vertical', and 'Text - Secure'. The 'Text' option is highlighted with a red box. Another context menu is also visible, listing options like 'Edit Current Object', 'Delete Current Object', 'Comment Current Object', 'Insert an Object', 'Show Form Objects', 'Show Blanked Captured Text', 'Show Info Panel', 'View Raw Capture', 'View Request List Capture Groups', 'Display Assignments', 'Exit', and 'Exit then Edit Form'.

The 'Text Command Properties' dialog box will open:



Change the "Text" field to be the name you gave the new field and put braces (aka squiggly brackets) around it. In the example CustAcct was used and therefore {CustAcct} is entered in the 'Text' field:



Adjust the font properties and placement as desired. Click OK to confirm the changes.

The field will appear on the face of the check:

Pay:Seven thousand two hundred dollars and no cents 56124

TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97546

Wellspring Software
Vendor Jackson Heating & A/C
Check Date: April 28, 2010
24437

INVOICE DATE	INVOICE NO	DESCRIPTION	INV. AMOUNT	DISCNT TAKEN	BALANCE
5-20-09	54353		8000.00	800.00	7200.00

Chk. Date	Chk. No.	Totals	8000.00	800.00	7200.00
4-28-10	24437				

Wellspring Software
445 Sovereign Court
Manchester, MO 63011
(800) 600-6861
www.WellspringSoftware.com

Bank of Missouri
St. Louis, MO
99.99/875155

Date April 28, 2010
Amount \$7,200.00

PAYSeven thousand two hundred dollars and no cents

TO THE ORDER OF Jackson Heating & A/C
6775 Spring Road
Milwaukie, OR 97546

56124

Yours Signature

⑆024437⑆ ⑆6365276⑆ ⑆001⑆ ⑆30⑆500⑆

193 / 194 6.656 , 9.210 56124

You can also 'drag & drop' to the proper location, if necessary.

When done, Close the View and SAVE the changes.