Forms Printer User Guide

Version 10.51 for Dynamics GP 10

Forms Printer Build

Version: 10.51.102

System Requirements

Microsoft Dynamics GP 10 SP2 or greater
Microsoft SQL Server 2005 or Higher

Reporting Services 2005/2008/2012 with Report Manager for SRS function.

Contact Us

For more information, pricing details or to schedule a demo, please contact us at:

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- sales@accountable.com
- www.accountable.com

A Guide for the Administration, Installation & Implementation of Forms Printer

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Contents

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Installation Checklist

1. Download the latest version of Forms Printer ☐

2. Obtain Registration Keys for the Downloaded Version ☐

3. Run the installation executable on the first workstation ☐

4. Delete the old FPD1230.dic and ASI1655.dic client files ☐

5. Launch Dynamics GP using an Administrative user ☐

6. Include new code ☐

7. Install and Initialize tables in first Company ☐

8. Enter Registration Keys ☐

9. Install and Initialize tables in additional Companies ☐

10. Add Dynamics GP Roles and Tasks ☐

11. Enter Report Engine Setup Information ☐

12. Enter Forms Printer Setup Information ☐

Installation and Administrative Setup

The initial installation of Forms Printer is performed in several steps. First is the installation of the initial Forms Printer client application. Next, the Forms Printer client code is included in the Microsoft Dynamics™ GP client application set. Following the code inclusion is the installation of SQL Server objects and data. Next, the Forms Printer Registration keys are entered to enable the application. Once Forms Printer is registered, the next three setup steps can be completed in whatever order you wish. These steps are to install additional workstations with the client application, to enter Roles and Tasks in the new Dynamics GP security models and to add Report Engine Setup information.

Installing the First Forms Printer Client Application

The installation of the initial Forms Printer client application is different than subsequent installs because 3 additional steps must be followed. Those steps are to: Include Forms Printer in the Dynamics GP Installation, Enter Forms Printer Registration Keys, and Install SQL Server Objects in Additional Companies.

Run the Forms Printer Installation File

Complete the following steps to install the Forms Printer client application on the FIRST Dynamics GP client workstation:

1. Download the Forms Printer Installation File

    a. Download the latest version of Forms Printer. Checking our web site for the most current version of the product before installation ensures that any updates or fixes are installed and is highly recommended.

    b. The file downloaded from the Accountable Software Resource Center will contain an installation file named **Forms Printer XXXX.msi** (where the XXXX will be the installing version).

2. Double Click on the **setup.msi** installer file to begin the installation.

3. Follow the installation wizard to complete the installation of Forms Printer.

    a. The installation program begins with a "Welcome" window. Take a moment to verify that the proper version for you Dynamics GP application is being installed.

    When ready, click **Next>**.

    b. Review the license agreement, and if you agree, confirm your acceptance to the terms described within by clicking **I Agree**. Note: You cannot install Forms Printer if you do not accept the terms.

    When ready, click **Next>**.

c. Review the Additional License Agreement required for using the Business Objects Runtime. If you agree, confirm your acceptance to the Business Objects terms described within by clicking **I Agree**. Note: You cannot install Forms Printer if you do not accept the terms.

When ready, click **Next>**.

d. Select the folder in which the Microsoft Dynamics™ GP application is installed. This folder is typically located on your local hard drive. The install program will attempt to default the installation to The Microsoft Dynamics™ GP Application folder. If the detected folder is not the location where Microsoft Dynamics™ GP is installed on your machine you will need to select the correct folder in which to install Forms Printer.

When ready, click **Next>**.

e. The Confirmation window provides a final opportunity to ensure the proper version installed.

When ready, click **Next>**.

The setup program will then begin to copy all files to the appropriate directories.

f. When the installation has completed the final Information window displays important information on documentation and other file locations.

When ready, click **Next>**.

g. The installation complete window is displayed.

When ready, click **Close**.

Remove the Old Dictionary Files

Prior to launching Dynamics GP after the installation, use Windows Explorer to navigate to your Dynamics GP client directory. From that folder, find the files **FPD1230.dic** and **ASI1655.dic**. These files must be renamed, moved or deleted. It is recommended that you rename them to FPD1230_old.dic and ASI1655_old.dic so that you have the files to revert to in the case of an installation issue.

Include Forms Printer in the Dynamics GP Installation

1. Launch Microsoft Dynamics™ GP
2. Log in as 'sa' or a database administrator.
3. A dialog window prompting to include the new code will be displayed, as shown in the following illustration:

Click **Yes**, and wait until the process has completed.

A progress bar will display, while the "unchunking" process is executing. At this point, our DYNAMICS.SET file will be modified to include the information required to run Forms Printer, and two dictionaries named "FPD1230.DIC" and "ASI1655.DIC" will be created in your Microsoft Dynamics™ GP application folder.

Install SQL Server Objects

After the new code is loaded, you must install Forms Printer to the SQL Server Database and will be prompted to do so. When prompted, using the steps below and you must repeat this database installation for each Dynamics GP Company by logging into each company and repeating the steps:

1. When presented with the dialog window prompting to install and initialize **Custom Report Integration** tables click **Yes** to initialize the new tables.

2. When presented with the dialog window prompting to install and initialize **Forms Printer** tables click **Yes** to initialize the new tables.

3. If running the Project Accounting module, you will be prompted with the dialog window asking to initialize **Project Accounting** tables click **Yes** to initialize the new tables.

Enter Forms Printer Registration Keys

Once the Database installation is completed you will be presented with the message to enter registration keys. To register Forms Printer follow these steps:

1. When prompted to register, click **Yes** to open the Forms Printer Registration window.

   If no registration prompt is presented, open the Accountable Software Registration window by clicking the Help icon, then selecting **About Microsoft Dynamics™ GP.** The About Microsoft Dynamics™ GP window will open and a Forms Printer Registration window will open as a companion window.

2. Click the **Register** button to open the Forms Printer Registration window.

   Enter the registration keys exactly as you received them from Accountable Software for your Microsoft Dynamics™ GP installation. Registration keys are provided by Accountable Software directly. For more information or to obtain your registration keys, please call (610) 983-3100 or email sales@accountable.com.

If you mistyped the keys, you will receive a warning message. Try again. If you still receive a warning, contact Accountable Software for assistance at techsupport@accountable.com.

3. Click **Register**.

4. Verify the Registration Keys.

   If the module(s) you are registering appear with a checkbox in the **Registered** column, the registration was successful.

   Click the **Close**.

Install SQL Server Objects in Additional Companies

To complete the SQL Server installation process, it is required that the following steps are completed for each Company:

1. Log in as 'sa' or a database administrator.

2. When presented with the dialog window prompting to install and initialize **Custom Report Integration** tables click **Yes** to initialize the new tables.

3. When presented with the dialog window prompting to install and initialize **Forms Printer** tables click **Yes** to initialize the new tables.

4. If running the Project Accounting module, you will be prompted with the dialog window asking to initialize **Project Accounting** tables click **Yes** to initialize the new tables.

Installing Forms Printer on Additional Workstations

In order to use Forms Printer on additional workstations, you must follow the client installation steps on those workstations. Note that once the previous steps have been completed the SQL Server installation and registration key entry is completed and does not need to be repeated. For additional workstation installs, follow these steps:

Run the Forms Printer Installation File

Complete the following steps to install the Forms Printer client application on the FIRST Dynamics GP client workstation:

1. Download the Forms Printer Installation File

   a. Download the latest version of Forms Printer. Checking our web site for the most current version of the product before installation ensures that any updates or fixes are installed and is highly recommended.

   b. The file downloaded from the Accountable Software Resource Center will contain an installation file named **Forms Printer XXXX.msi** (where the XXXX will be the installing version).

2. Double Click on the **setup.msi** installer file to begin the installation.

3. Follow the installation wizard to complete the installation of Forms Printer.

   a. The installation program begins with a "Welcome" window. Take a moment to verify that the proper version for you Dynamics GP application is being installed.

When ready, click **Next>**.

b. Review the license agreement, and if you agree, confirm your acceptance to the terms described within by clicking **I Agree**. Note: You cannot install Forms Printer if you do not accept the terms.

When ready, click **Next>**.

c. Review the Additional License Agreement required for using the Business Objects Runtime. If you agree, confirm your acceptance to the Business Objects terms described within by clicking **I Agree**. Note: You cannot install Forms Printer if you do not accept the terms.

When ready, click **Next>**.

d. Select the folder in which the Microsoft Dynamics™ GP application is installed. This folder is typically located on your local hard. The install program will attempt to default the installation to The Microsoft Dynamics™ GP Application folder. If the detected folder is not the location where Microsoft Dynamics™ GP is installed on your machine you will need to select the correct folder in which to install Forms Printer.

When ready, click **Next>**.

e. The Confirmation window provides a final opportunity to ensure the proper version installed.

When ready, click **Next>**.

The setup program will then begin to copy all files to the appropriate directories.

f. When the installation has completed the final Information window displays important information on documentation and other file locations.

When ready, click **Next>**.

g. The installation complete window is displayed.

When ready, click **Close**.

Remove the Old Dictionary Files

Prior to launching Dynamics GP after the installation, use Windows Explorer to navigate to your Dynamics GP client directory. From that folder, find the files **FPD1230.dic** and **ASI1655.dic**. These files must be renamed, moved or deleted. It is recommended that you rename them to FPD1230_old.dic and ASI1655_old.dic so that you have the files to revert to in the case of an installation issue.

Include Forms Printer in the Dynamics GP Installation

1. Launch Microsoft Dynamics™ GP

2. Log in as 'sa' or a database administrator.

3.   A dialog window prompting to include the new code will be displayed, as shown in the following illustration:

Click **Yes**, and wait until the process has completed.

A progress bar will display, while the "unchunking" process is executing. At this point, our DYNAMICS.SET file will be modified to include the information required to run Forms Printer, and two dictionaries named "FPD1230.DIC" and "ASI1655.DIC" will be created in your Microsoft Dynamics™ GP application folder.

Uninstalling Forms Printer

If it becomes necessary to temporarily disable Forms Printer on a Microsoft Dynamics™ GP workstation, one can use the Microsoft Dynamics™ GP Tools->Customization->Customization Status Window to Disable the Forms Printer product for one login Session.

In order to more permanently disable Forms Printer on a Workstation, one must edit the Microsoft Dynamics™ GP "Launch" file (typically named dynamics.set) to remove references to the Forms Printer Product (ID = 1230), and the Supporting "CRI" component (Product ID = 1655) . Microsoft Dynamics™ GP provides a facility for editing the launch file from the Tools->Setup->System->Edit Launch file menu. The Microsoft Dynamics™ GP Help Topic from this window describes how to remove a product from the Launch File using a text editor.

In order to Completely remove Forms Printer and the Components that it installed, one should remove it from the Launch file, then remove the runtime components using Windows "Add –Remove Programs" Control Panel Applet, Then optionally delete the FPD123.DIC Forms Printer Dictionary, and optionally Drop the ASI123* Tables and stored procedures in the Microsoft Dynamics™ GP Company SQL Databases.

Adding Roles and Tasks

With the new Security model implemented in Microsoft Dynamics™ GP 10 and greater, it becomes necessary to enable logins to use or administer Forms Printer by placing the users in Dynamics GP Roles. These Roles are made of Dynamics GP Tasks that allow access to various programs and code resources.

Roles

When Forms Printer Is initialized and logged into the first time, by 'sa' or 'DYNSA', The Following Tasks and Roles are created:

FORMS PRINTER (CRI) ADMIN
This role allows administration of the "Custom Report Integration" (CRI) settings that Forms Printer uses to connect the Crystal Reports Reporting Engine to the SQL database.

FORMS PRINTER OPTIONS ADM
This role allows users to access the Forms Printer Setup window where the setup and administration of various reports printed by Forms Printer are maintained.

FORMS PRINTER USER
This role is for users all users of Dynamics GP that will be using Forms Printer in any capacity to print reports. While it currently uses the same settings as the FORMS PRINTER OPTIONS ADM role, it can be modified as needed to restrict access to setup windows.
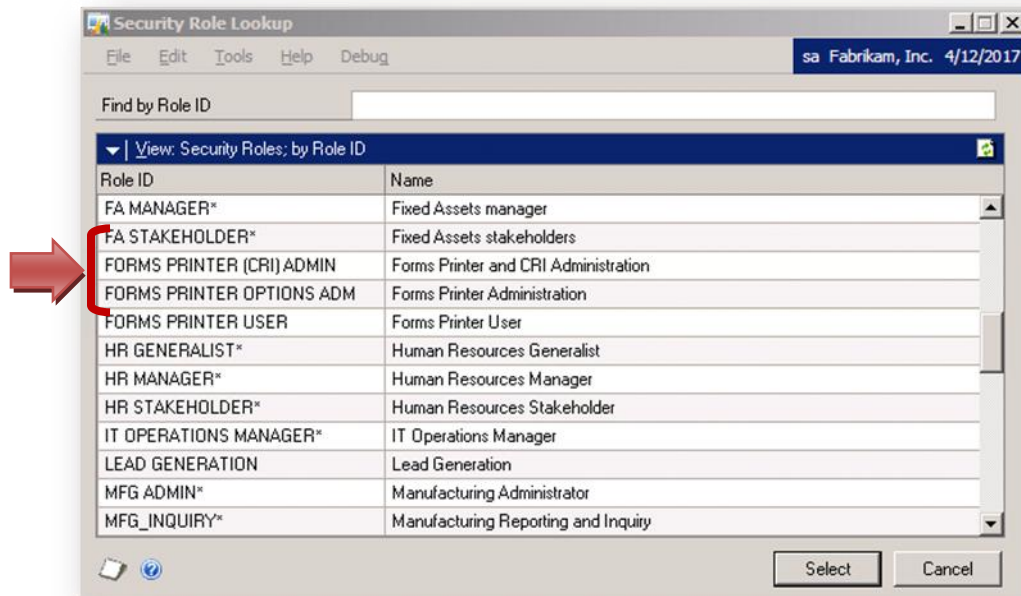
All GP users who need to use Forms Printer should have at least the FORMS PRINTER USER Role added to their user security role list. If all users need access to Forms Printer printing, one can add the Forms Printer Security Tasks directly to a broadly applicable role which many users already have been placed in, such as "ORDER PROCESSOR".

Example: Adding the Forms Printer Administrator/User Tasks to the General "Order Processor" Role add the Security Task ID's for the Setup Windows, and Forms Printer Options Windows:
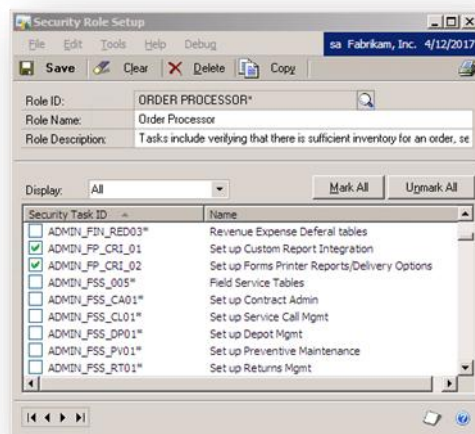
Tasks

The Task ID's above, can be duplicated, and then modified, if you need to apply finer grained control to users with regards to what Forms Printer related windows they can open. The Default Security Task ID's for Forms Printer are defined as shown below:
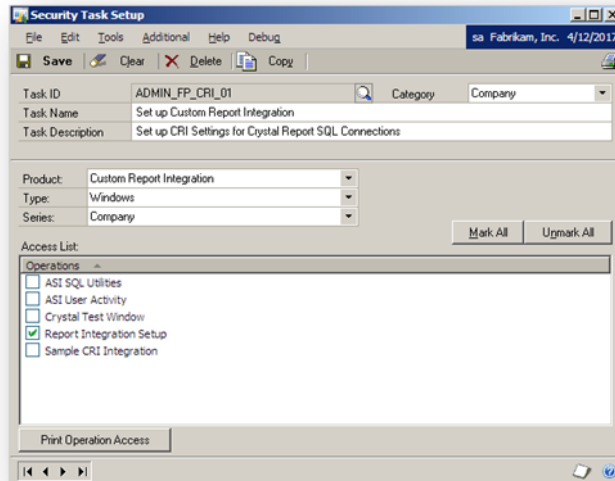
Also: See the specific added window Operations under the ADMIN_FP_CRI_01 Task ID for the System series.
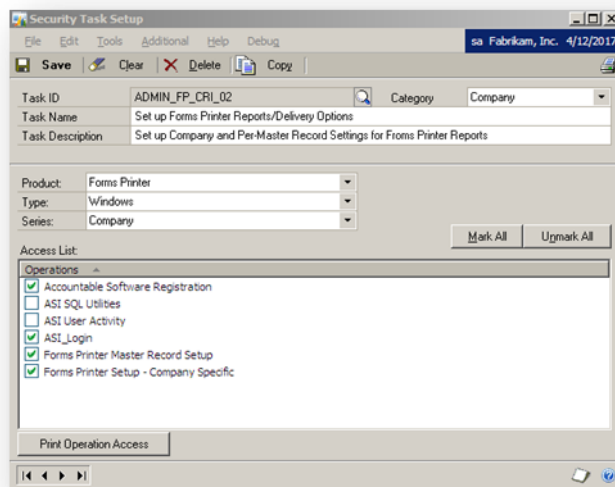
Also: See the specific added window Operations under the ADMIN_FP_CRI_02 Task ID for the Purchasing, Sales, and System series.

Enter Report Engine Setup Information

From the Forms Printer Setup Window, the Report Engine Setup menu option includes two listings: Crystal Reports Setup, and SQL Server Reporting Services Setup. Report Engine refers to the reporting tool used to print reports from Forms Printer. Select the Reporting Engine you wish to setup.

Note: You may use both the Crystal and SRS Reporting Engines with different reports setup to use either engine.

Window Navigation

To open the **Report Engine Setup** window, you must first Open the **Forms Printer Setup** window using the menu navigation: Microsoft Dynamics GP > Tools > Setup > Company > Forms Printer

On the Forms Printer Setup window, select Report Engine Setup then either **Crystal Reports Setup**, or **SQL Server Reporting Services Setup**.

This screenshot shows the Report Engine menu from the Forms Printer Setup window.
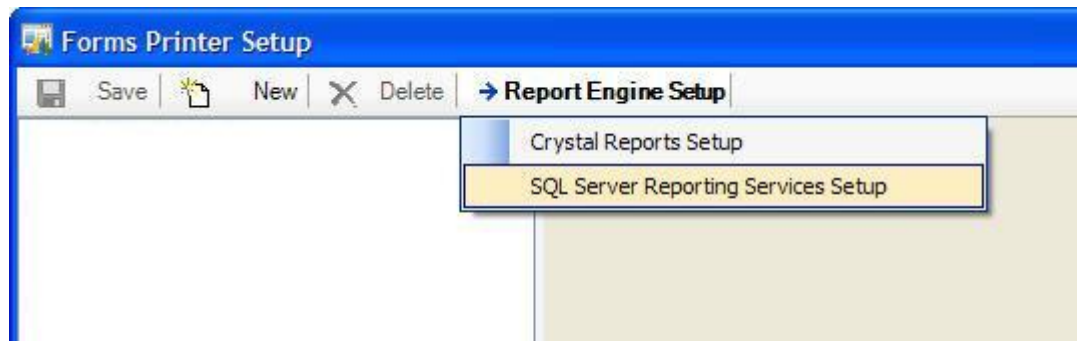
Crystal Reports Setup

Press this button to open the Report Integration Setup Window where the Report Authentication for Crystal Reports can be specified.

Window Buttons

The buttons on the SQL Server Reporting Services Setup Window include:

Buttons	Description
Save	Saves the current entry values and closes the Window.

Window Fields

Fields	Description
Manually enter a SQL login and password	Mark this checkbox to enter a SQL Server user and password.
SQL User Name	Enter a valid SQL login.
SQL Password	Enter the password for the SQL User
Verify Password	Verify the password by entering it again.

Window Example

The screenshot below shows the entries for Crystal Reports using an **example** SQL Login "FormsPrinterUser".
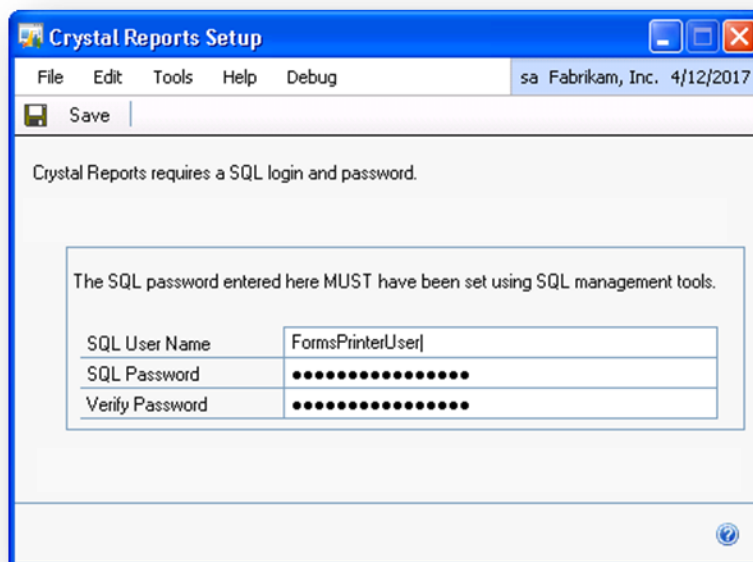
SQL Server Reporting Services Setup

Prior to using SQL Reporting Services [SRS] with Forms Printer, you must add SRS setup information. The use of SRS with Forms Printer is dependent on an installed and properly functioning SRS installation.

Note: Installing Forms Printer DOES NOT affect an existing SRS installation in any way, nor does it install SRS or any files required to run an SRS installation.

Window Buttons

The buttons on the SQL Server Reporting Services Setup Window include:

Buttons	Description
OK	Saves the current entry values and closes the Window.
Cancel	Closes the window without saving any changes to the current entry values.

Window Fields

Fields	Description
SRS Report Server URL	This editable text field is used to enter the path to the

	Report Server Web Application
SRS Report Server Web Services URL	This editable text field is used to enter the path to the specific Web Services asmx page in the Reporting Services Web Applications.

Window Example

The screenshot below shows these entries for a default installation of Reporting Services on an **example** Web Server named "mywebserver".
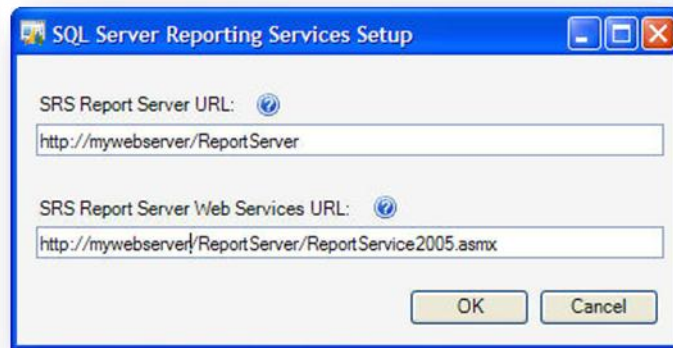
Enter Forms Printer Setup Information

Overview

Once the Administrative steps of installing Forms Printer, entering the required Roles and Tasks, and entering Report Engine information have been completed, the next step is to begin the set up Forms Printer.

Forms Printer Setup

To access the setup information, use the Menu item shown in the Window Navigation section, or add the Forms Printer Setup window to your work button or Shortcut Bar.

Window Buttons

Buttons	Description
Save	Saves any changes made to window values.
New	This button lists choices for adding new entries. The available values vary depending upon the entry currently selected in the tree view.
Delete	Deletes the currently selected entry from the tree view.
Report Engine Setup	Displays the Report Engine Setup menu options for setup of the available reporting tools.

Window Fields

Fields	Description
Report / Company / Class ID / Master Record List	This treeview list is used to display and modify the list of reports, Companies, Class ID, and Master records that are setup to use Forms Printer.
Record Entry Setup Page	This editable page is used to determine the various settings for the record selected in the treeview.

Window Example

This screenshot shows the Forms Printer window as it will appear prior to adding any report records.

NOTE: If you are upgrading Forms Printer, all of the reports you had setup in your earlier version will be migrated to the new setup and you will see your settings listed here.
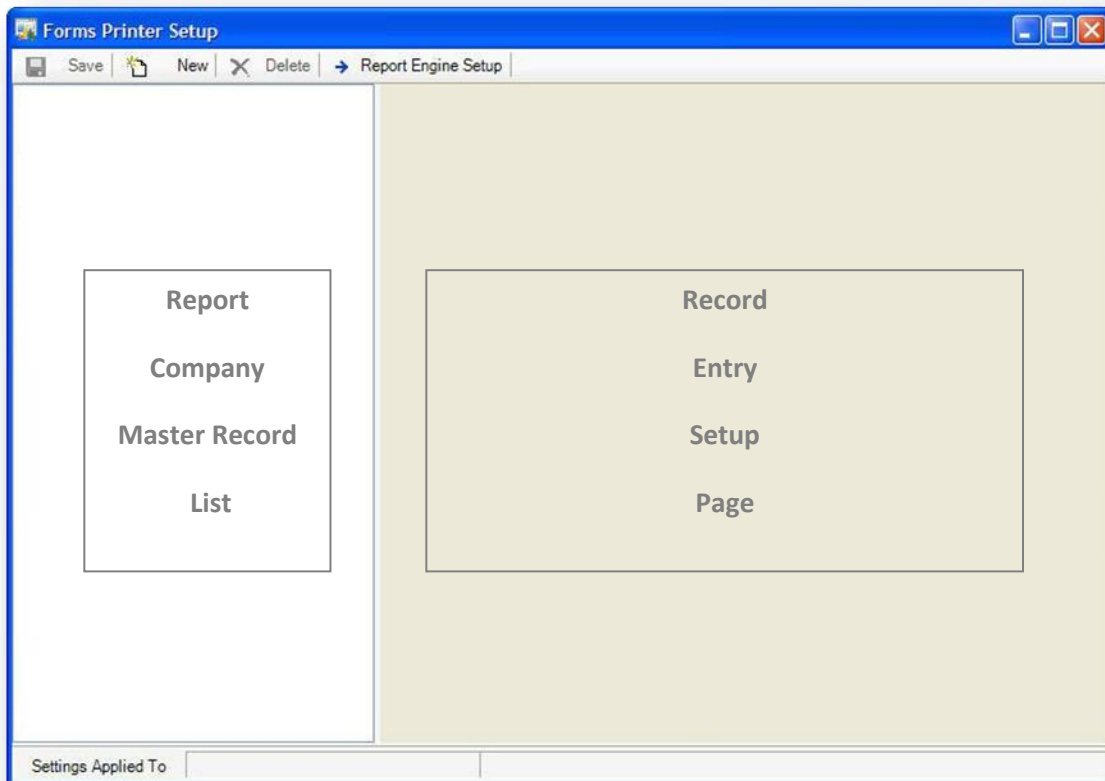
Report / Company / Class ID / Master Record List

The list of reports, Companies, Class IDs and Master Records which will be controlled by Forms Printer are displayed in the treeview. Upon installation and prior to the first added Report, this list is blank.

Once you've added a report for printing with Forms Printer, you can then add one or more Companies beneath the report entry if different settings per company are desired.

Finally, once a Company has been added, you can add one or more Class IDs or Master Records beneath the Company allowing a Class or Master record to have specific settings for report or delivery.

To begin adding reports, follow these steps:

1. Click the **New** button from the control area.
2. Select **Include New Report** from the dropdown menu.
3. From the Include New Report window, select a **Product**.
   The Product is the Dynamics GP module or 3rd party containing the report to be added.
4. Select the **Series**.
   The Series is the Dynamics GP series containing the report to be added.
5. Select the **Report** from the dropdown list.
   The Report drop down list is the Dynamics GP reports available.
6. Click **Save**.

The screenshot below shows the Include a New Report window.
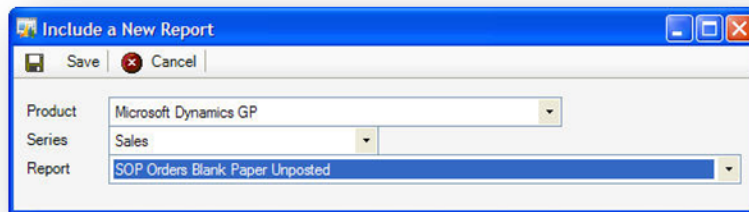
To add a Company, follow these steps:

NOTE: Only Add Companies if you want DIFFERENT settings between companies, Class IDs or Master Records. If all Companies, Class IDs or Master Records will use the same report and settings, you do not need to add Company Records.

1. **Select a Report** in the Report / Company / Class ID / Master Record List.
2. Click the **New** button from the control area (or right click in the treeview).
3. Select **Include New Company for Selected Report** from the dropdown menu.
4. From the Include a New Company window, select a **Company** from the dropdown list.
5. Click **Save**.

This screenshot of the Include a New Company window shows an example of the Product, Series, and report fields as well as the selected Company to be added.
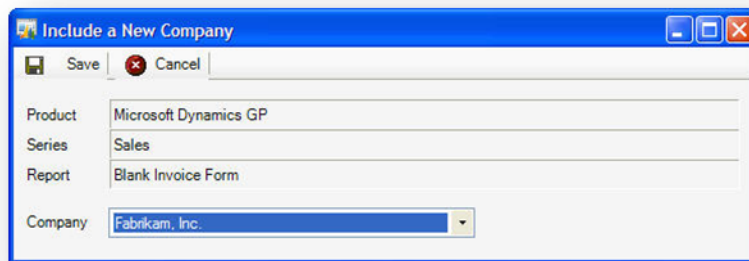
To add a Class ID Record, follow these steps:

NOTE: Only Class ID Records if you want DIFFERENT settings between Class IDs. If all Class ID Records will use the same report and settings, you do not need to add Class ID Record entries. If you have a Class ID and a customer In that Class ID defined in Setup, the Customer's settings will take precedence over the Class.

1. **Select a Company** in the Report / Company / Class ID / Master Record List.
2. Click the **New** button from the control area (or right click in the treeview).
3. Select **Include New Class ID Record for Selected Report and Company** from the menu.
4. From the Include a New Class ID window, select a **Class ID** by clicking on the Class ID Lookup.
5. This will open a lookup window where you can select a Class ID and return it to the Include a New Class ID window.
6. Click **Save**.

This screenshot of the Include a New Class ID window shows the selected report and Company to which the Class ID is being added.
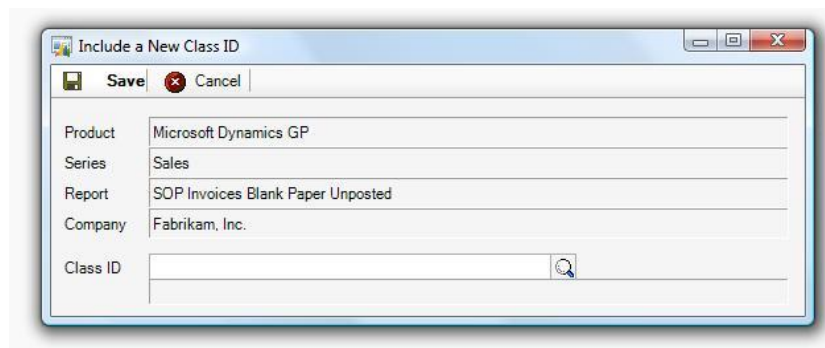
To add a Master Record, follow these steps:

NOTE: Only Add Master Records if you want DIFFERENT settings between Master Records. If all Master Records will use the same report and settings, you do not need to add Master Record entries. If you have a Class ID and a customer In that Class ID defined in Setup, the Customer's settings will take precedence over the Class.

7. **Select a Company** in the Report / Company / Class ID / Master Record List.
8. Click the **New** button from the control area (or right click in the treeview).

9. Select **Include New Master Record for Selected Report and Company** from the menu.
10. From the Include a New Master ID window, select a **Master ID** by clicking on the Master ID Lookup.
11. This will open a lookup window where you can select a Master ID and return it to the Include a New Master ID window.
12. Click **Save**.

This screenshot of the Include a New Master ID window shows the selected report and Company to which the Master ID is being added.

Record Entry Setup Page

For each of the records added to the Report / Company / Master Record list, the Record Entry Setup Page is used to determine the individual settings for report engine, report source, printing and Delivery.

NOTE: When adding a new entry to the Report / Company / Master Record list each record will, BY DEFAULT, be set to "To Printer' with number of Copies set to 1. Also note that all entries must have at least one Delivery Setting either "To File", "To Printer", or "To Mail".

Window Fields and Controls

Fields	Description
Report Tool	This dropdown list is used to select the Reporting engine desired for the selected Report / Company and / or Master Record.
Report Path	If using Crystal Reports this is filed and lookup are used to select the rpt file Forms Printer will use. When using SRS, this field and lookup are used to select the SRS Report, from the Select Report window of SRS reports.
To Disk File	Mark this checkbox to have the report exported to a file each time it is delivered, regardless of whether 'File' was selected as the destination on the Report Destination window.
File Format	The File Format selection determines the format for the exported document.
Save Folder	Determines the directory in which Forms Printer will create the exported file. This folder can be determined in one of two ways: 1. Using the **Export File Name** feature. For details on that functionality click the link to see the description below. 2. Using the Folder Browse Button. This is the path to the directory, and does not include the file name unless the **Export File Name feature** is used to create a file name. Otherwise, Forms Printer automatically names the file to ensure a unique file name is created. When printing single documents, the file is named with the convention: *Document Type Document Number System Date System Time.extension* For Example: Order ORD0001 06-25-01 8 30 27AM.PDF When printing batches or ranges of documents, the file is named with the convention: *Document Type First Document Number to Last*

	Document Number System Date System Time.extension For Example: Order ORD0001 to ORD0005 06-25-01 8 30 27AM.PDF The exception to this convention is Statements. Because Statements do not have a document number, the naming convention is: *Document Type Customer Number System Date System Time.extension* *Or* *Document Type First Customer Number to Last Customer Number System Date System Time.extension* **Note:** If the document being exported has any custom master record settings, for ANY master record, then Forms Printer will create individual files per document, even when printing batches or ranges.
Export File Name	**This window, opened from the Forms Printer Setup window, allows the building of the Export Directory and Export File Name when using the To Disk File feature of the Forms Printer Delivery System.**
To Printer	Selecting the 'To Printer' checkbox enables the Delivery System printer output. By default this option is checked. Marking this option will send a copy of the report to the printer whenever the delivery system is used. Left unmarked, the report will only print to the printer if the 'Print' option is selected on the Report Destination Window.
Print Using	Print Using determines where the document will be printed when used within Microsoft Dynamics™ GP. The valid choices are described below. **Printer Saved On Report – Crystal Reports ONLY** This setting will direct the Crystal report to the printer saved in the Crystal Report Designer Print Setup window when the report was designed or modified. If the report has no defined printer or the defined printer is not available from the workstation, the default system printer will be used. **Default System Printer** This setting instructs Forms Printer to print the selected Crystal report to the default printer defined on the user's workstation. **Ask Each Time Report Prints** This setting will allow you to select the printer at the time the report is printed. Using this setting will direct the report to the selection made during the printing process.
Copies To Print	Number of copies determines the quantity output to the printer when the report is printed. This quantity will override any quantity selected from the print dialog within the report print setup, or the system default print setup. If using 'Ask Each Time Report Prints', then the number of copies entered in

the properties window will be used.

Note: If the 'To Printer' checkbox is selected for a Report or Company, a copy of the document will be printed every time the Delivery System is used. To have the document print to the printer only when specified, mark the 'To Printer' checkbox, set the desired 'Print Using' and 'Number of Copies' options, then unmark the 'To Printer' checkbox. This will allow Forms Printer to use your printer settings, but only print to the printer when 'Printer or Delivery System' is selected from the Report Destination window, and Printer is selected from the Delivery System Dialog window. Note that this functionality DOES NOT apply to Master Records.

Number of copies can also be set using the optional Print Dialog window. When printing, Forms Printer reads the Microsoft Dynamics™ GP 'NoPrintDialogs' setting in the Dex.ini file. If NoPrintDialogs=FALSE, then the user will be presented with the Print Dialog window. This can be overridden for Forms Printer Reports only, by using the ASINoPrintDialogs=TRUE dex.ini setting. The Dialog window allows Number Of Copies and Collate options to be entered, as well as page ranges when used with Cyrstal 9 runtime, or displays a complete printer selection dialog with the Currently installed Crystal XI-R2 Runtime.

|	
To Mail	Selecting the 'To Mail' checkbox, allows delivery of the selected document by E Mail.
Use Outlook	Forms Printer will automatically detect whether Microsoft Outlook is installed, and enable or disable the Microsoft Outlook Radio button and some of the E Mail options accordingly. **Note: If using SRS as the Reporting Engine only Use Outlook is enabled.**

Use Crystal MAPI	If Outlook is **not** detected and the Reporting engine is Crystal Reports, then Forms Printer will use the Crystal Reports MAPI mailing functionality, and automatically mark the Crystal MAPI Radio button, disabling the option to use Microsoft Outlook. Even if Outlook is installed, you may still choose to use Crystal MAPI Mail by selecting the Crystal MAPI Radio button.
	Because of the limits of the Crystal API, certain functionality is unavailable when not using Outlook.
	The functional limits when using Crystal MAPI functionality are:
	1. You cannot specify an 'E Mail From' profile.
	    The default profile will be used as the 'From' address.
	2. You cannot name the attachment.
	    The attachment name will be the same as the Crystal Report used to create it.
	3. You cannot specify the Send Option.
	    The E Mail will be sent automatically to the recipient.

Multiple Documents per E-mail	When printing a batch or range of documents with Forms Printer the Multiple Documents per E-mail checkbox creates a single Email for each unique Mail To E-mail address with all documents for the associated contact added as attachments to that single Email.
Mail From	The 'E Mail From' dropdown list will be enabled if Microsoft Outlook is installed. This dropdown list is populated by default from the Outlook Global Address List. Here you have the option to use the default Outlook User, or specify a specific profile to use as the 'Send On Behalf Of' mail 'From'. If using a profile other than default user, the default user must have 'Delegate' permissions in Outlook. For more information about this topic, please see the Outlook help documentation regarding Delegates.
	Note: In order to use the 'To Mail' feature of the Forms Printer Delivery System, the client workstation must have a **M**essaging **A**pplication **P**rogramming **I**nterface (MAPI) compliant E Mail application loaded. The full version of Microsoft Outlook is currently the only supported MAPI client According to the Crystal /Business Objects/SAP web site.
	To have access to all of Forms Printer's E Mailing functionality, it is recommended to use Microsoft Outlook 2000 or Greater.
Mail To	The 'E Mail To' dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the E Mail To Address. This E Mail address is stored per Master Record, per Address, in the Internet Information window. The Master record is either the Customer or Vendor for which the document was created, depending on the document type being printed.
	Alternatively, the option Scripted Mail To List can be selected allowing the results of the Scripted Mail To Addresses list to control the Mail To address for the selected entry.
Send Option	The Send Option dropdown list allows you to select the destination for the created E Mail.
	The selections for Send Options are described below.
	• *Send Directly to E Mail Recipient:* Automatically sends the E Mail.
	• *Save To Outlook Drafts folder:* Creates the E Mail in the Drafts folder. E Mail must be sent manually.
	• *Save to Outlook Outbox:* Creates the E Mail and saves it to the Outbox. E Mail must be sent manually.
	• *Save to Outlook Outbox Delayed:* Creates the E Mail and saves it to the Outbox. E Mail will be sent automatically at the specified time selected by the Hours to Delay option.
	• *Display created E mail:* Creates the E Mail displays the E mail rather than sending or saving it. Once any required modifications are made, the E mail can be modified and then saved or sent manually.
Hours To Delay	The Hours to delay option is enabled when the Send Option dropdown list is set to 'Save to Outlook Outbox Delayed'. Setting this number adds the specified number of hours to the current system time, and uses that to set

|	
	the E Mail's delayed send property. For example, if the E Mail was created at 10:15 AM, and the Send option was set to Save To Outlook Outbox delayed, with an Hours To Delay setting of 12, the E Mail would be created in the Outbox, and would stay there until 10:15 PM, and then it would be E Mailed to the selected Recipients.
Additional Mail To Addresses	The Additional Addresses link opens the Additional Addresses Setup window. This window allows you to define addresses to mail to, other than the primary address selected in the 'E Mail To' dropdown list.
Scripted Mail to Addresses	The Scripted Mail To Addresses link opens the Scripted Email List window. This window allows you to manually add a SQL script which returns a custom list of Mail To, CC and / or Bcc Email Addresses for email delivery.
Attachment Format	The Attachment Format dropdown list allows you to specify the format for the E Mail attachment.
Attachment Name	The Attachment Name allows you to enter the text, as it will appear in the E Mail for the attachment name. To create a calculated Attachment Name, open the Subject and Attachment Name Editor window using the expansion button. When creating an attachment name, the following characters should be avoided, as they are invalid in the name of a file: \ / ? * : " < > | For help with using the Subject and Attachment Name Editor, see the Message Editor section below.
Body Text	This field displays the Message ID to be used when E Mailing the selected document type. *For more information, see the Message Editor section of this document.*
Message	This field displays the Message Description.
Subject Text	E Mail Subject sets the text, as it will appear in the E Mail Subject line. To create a calculated subject, open the Subject and Attachment Name Editor window using the expansion button. *For help with using the Subject and Attachment Name Editor, see the Message Editor section below.*

Window Example

Below is a screenshot example of the Forms Printer Setup window showing Customer and Class ID entries in the Report / Company /Class ID / Master Record list and Record Entry Setup Page.
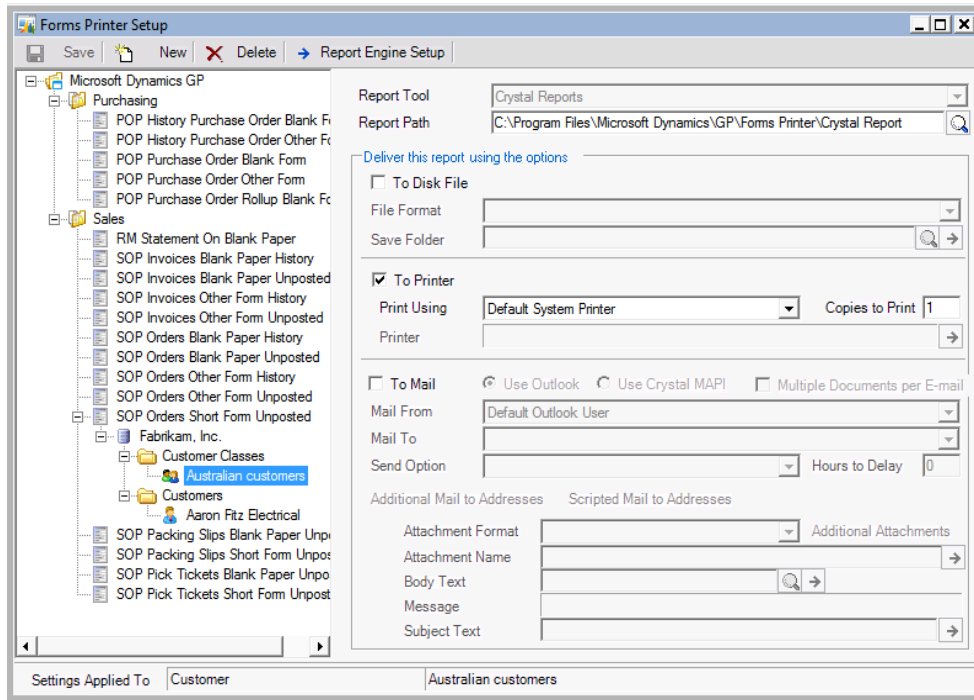
Export File Name

The Export File Name window is used to create a custom file path and or file name for use when exporting to file through the delivery system. This feature allows the folder and / or file name to be created at runtime based on data associated with the document. For example, rather than defaulting the file name to the Forms Printer naming convention of Document Type, number and date time, you could create a file that gets its file name from each Purchase Order's PO Number. In the screenshot below a file will be created for each Purchase Order as it is printed, and the name of the file will be the PO Number of the transaction. Note the parameter used to create the file name. All fields associated with the document are accessible for the parameterized name and are listed in the Select Form Fields list.
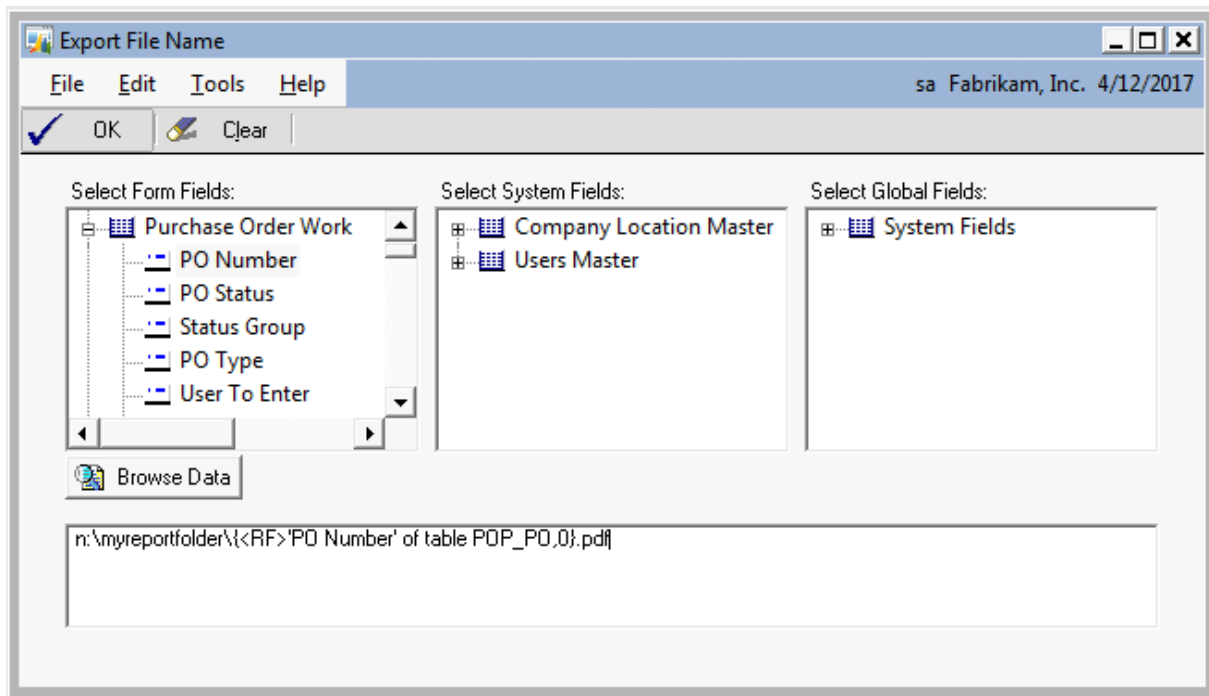
When creating the file path, there are several rules that Forms Printer will follow. Those are:

1. If the created file path and name do not contain a period "." After the last backslash "\", Forms Printer assumes you are trying to define only a file path and NOT a path and name. It will look for the path as defined and, if found, will create a file using the standard naming as detailed in the Save Folder description in the table above. For example, the folder path below would assume that no file name has been added because there is no period. Forms Printer would expect there to be a folder with the PO Number as its name.

    ONLY FOLDER DEFINED: n:\myreportfolder\{<RF>'PO Number' of table POP_PO,0}
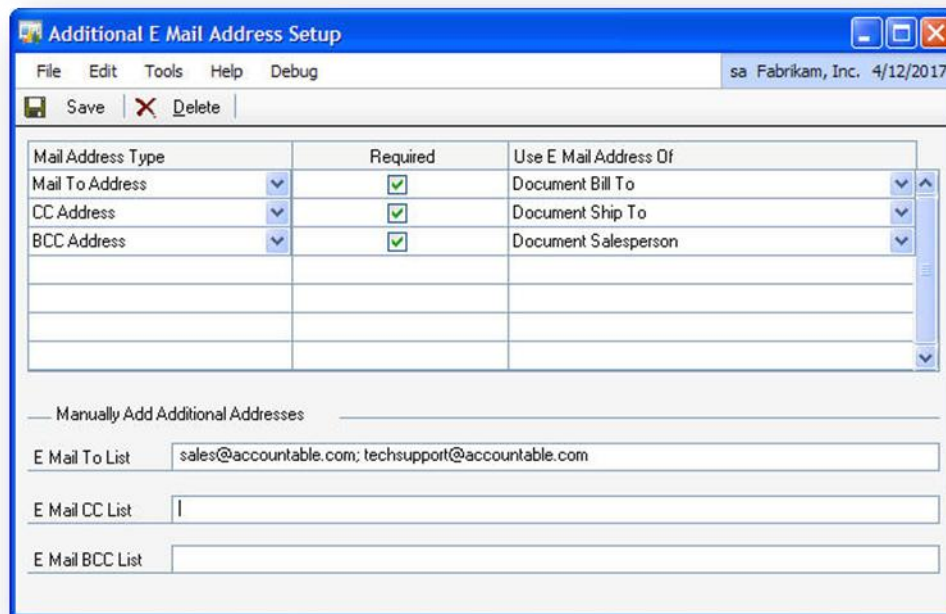
    In this example, the entire folder path and file name are defined:

    FOLDER AND FILE NAME: n:\myreportfolder\{<RF>'PO Number' of table POP_PO,0}.pdf

2. The defined folder path MUST exist and be a valid path from the printing workstation. Forms Printer will not try to create the folder path at runtime. If the folder does not exist, documents defined to go to that folder will fail and must be reprinted.

3. Any part of the file / folder name can be parameterized but when parameterizing the folder path, remember rule #2.

4. The file extension defined must match the extension selected in the File Format dropdown on the Forms Printer Setup window. If they do not match, the name of the file will be as specified here in the Export File Name window but that actual file format will be that of the File Format dropdown selection.

5. If a duplicate file name is created as a result of exporting to file, Forms Printer will overwrite the existing file WITHOUT WARNING.

Additional E Mail Addresses Setup

The Additional Addresses button opens the Additional Addresses Setup window. This button also provides a visual indicator as to whether or not additional addresses have been entered. If additional addresses exist for this document type, the button will be displayed in yellow. When no additional addresses exist, the button will be white. This window allows you to define addresses to mail to, other than the primary address selected in the 'E Mail To' dropdown list. The screenshot below shows this window.

Mail Address Type

Determines whether the selected address will be added to the Mail To, Cc, or Bcc list of the E Mail.

Required

Mark this checkbox to have the E Mail halted when the selected address is blank. If using Crystal MAPI for E Mailing, the E Mail will not be created if the Primary or any Required E Mail Address is blank. If using Outlook, the E Mail will be created, however the 'Send Option' will be ignored, and the E Mail will be saved as a Draft. In either case, the error will be reported on the Delivery System Error Log, which prints after an E Mailing error is encountered.

Use E Mail Address Of

The 'E Mail Address Of' dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the additional E Mail Address. This E Mail address is stored per Master Record, per Address, in the Internet Information window. The Master record is either the Customer or Vendor for which the document was created, depending on the document type being printed.

E Mail CC List

The E Mail CC List allows you to manually enter additional addresses to be Carbon Copied.

E Mail BCC List

The E Mail CC List allows you to manually enter additional addresses to be Carbon Copied.

Note: *E Mail Addresses in the CC and BCC lists must be separated with a Semi-Colon. If you enter a combination of manual addresses and dynamically selected addresses, Forms Printer will use both to create a complete Mail To, Cc and Bcc list.*

Scripted Email List

The Scripted Mail to Addresses button opens the Scripted Email List window. This window allows you to manually add a SQL script which returns a custom list of Mail To, CC and / or Bcc Email Addresses for email delivery.
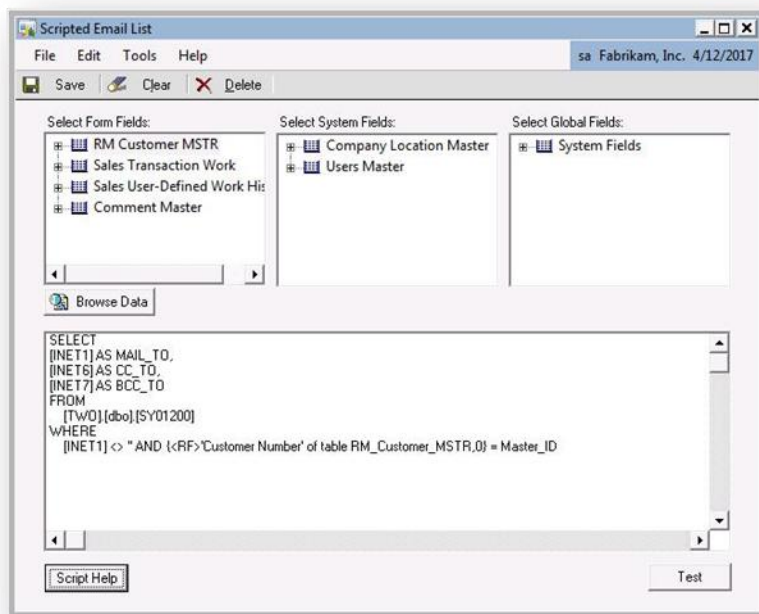
Select Form Fields

The Select Form Fields List displays the form tables and fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the script text.

Select System Fields

The Select System Fields List displays system tables and fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the script text.

Select Global Fields

The Select Global Fields List displays global fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the script text.

Browse Data

The Browse Data button displays a list of the first 5 unique values in the selected Form Table column. This is provided as an easy way to determine the contents of a given field.

Script Input

The Script Input field allows the user to enter a valid SQL script. Supported syntax includes SELECT AND EXEC statements for SQL Tables, SQL Views, SQL Functions and Stored Procedures.

Script Help

The Script Help button opens the Scripted Email Help window which displays a basic explanation on the use of the Scripted Email feature.

Test

The Test Button opens the Scripted Email Query Test window where the entered script can be tested for syntax and proper data return based on entered parameters.

Scripted Email Query Test

The Scripted Email Query Test window verifies the script entered on the Scripted Email List window. Any error in the Script's syntax, references or parameters will be displayed by a dialog box once the Run Query button is pressed.
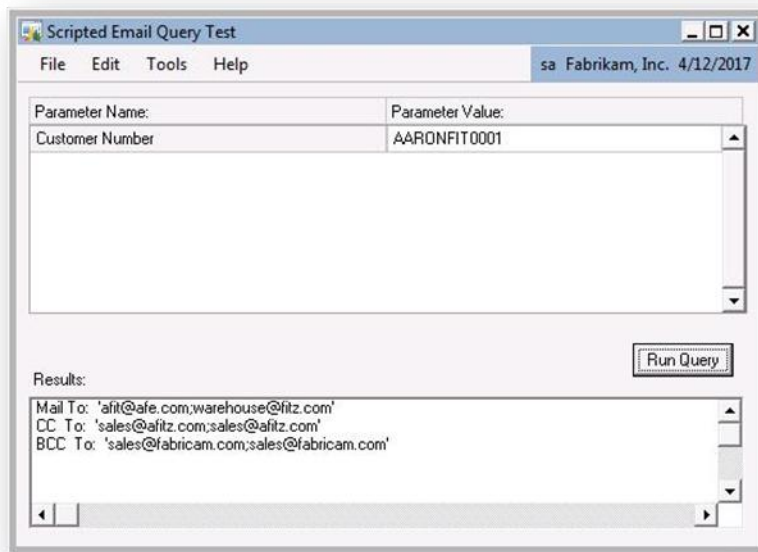
Parameter Name

The Parameter name list shows parameters created by the entered script.

Parameter Value

The Parameter Value list allows you to enter values for each of the Parameter in the script allow you to test the results for one or more records as needed.

Run Query

The Run Query Button executes the entered script passing to the script any entered parameters.

Results

The results pane shows the returned data from the execution of the query. The data is listed in the form of the returnable fields:

> **Mail To:**
> Displays a semicolon separated list of the Mail To Email addresses returned by the script.
>
> **CC To:**
> Displays a semicolon separated list of the CC To Email addresses returned by the script.
>
> **BCC To:**
> Displays a semicolon separated list of the BCC To Email addresses returned by the script.

Important Notes on Scripted Email Lists

1. The Scripted Email Lists can return **1 or more** email addresses for the Mail To, CC and BCC fields. When the script finds more than 1 record matching the selection formula, the records will be returned in a semicolon separated list.

    BE CAUTIOUS WHEN ENTERING YOUR SCRIPT. YOU ARE RESPOSIBLE FOR ENSURING THE PROPER SCRIPT AND SELECTION CRITERIA HAVE BEEN ENTERED. THE WRONG SCRIPT CAN SEND EMAILS TO INDIVIDUALS YOU DID NOT INTEND.

2. You can choose to use any or all of these 3 but the order is always fixed. In other words, the returned result will always be Mail To, then CC , then BCC lists. If you wish to skip one or more of the lists, return a blank column from the script by using empty quotes. For example, if we wanted to return the Mail To and BCC but not the CC we would enter

    ```
    SELECT Field1 AS MailTo, '' AS CC, Field3 AS BCC…
    ```

3. The context of the script execution is based on the current Dynamics GP company. If you need to execute the script in the context of a different database, you may add the database and owner descriptors. For example, to execute a script in the Dynamics database you would use the syntax:

    ```
    SELECT Field1 FROM DYNAMICS.dbo.TableX
    ```

4. The Scripted lists can be used exclusively or in conjunction with the Mail To functionality and Additional Mail To Addresses functionality available on the Forms Printer Setup Window.

    To have the scripted List completely control all of the Email addresses, select the **Scripted Mail to List** option from the **Mail To** dropdown list on the **Forms Printer Setup** window and leave the **Additional Mail to Addresses** blank.

Message Editor

The Message Editor Window is used to create the E Mail message or body for the document type to which it is assigned. This message can be manually entered text, or a combination of manually entered text and parameter fields added from specific report tables, system tables, and global fields. When the message is created and assigned to a particular document, Forms Printer will fill in any parameters using data associated with the document being E Mailed.

The screenshot below shows an example of a parameterized message for an unposted Sales Order Processing document.
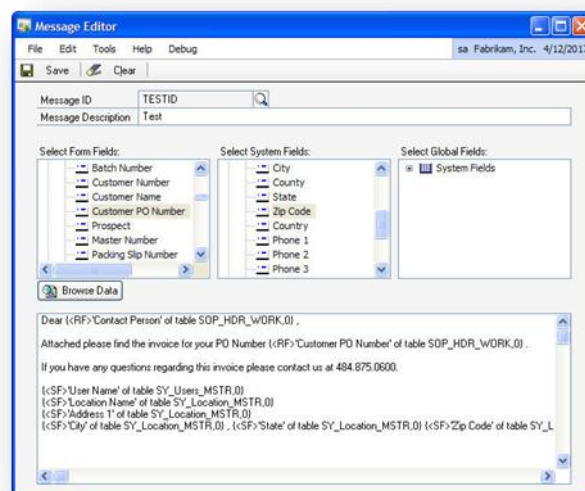
Note: **Parameters appear in the Message Editor Text field surrounded by {}. These brackets and all of the text that appears between them are required in order for Forms Printer to pull the correct information. The parameters shown in the message will be replaced with the actual value of the fields when the E Mail is created. These parameters should not be altered in any way.**

Select Form Fields
The Select Form Fields List displays the form tables and fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the message text.

Select System Fields
The Select System Fields List displays system tables and fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the message text.

Select Global Fields
The Select Global Fields List displays global fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the message text.

Browse Data

The Browse Data button displays a list of the first 5 unique values in the selected Form Table column. This is provided as an easy way to determine the contents of a given field.

Note: **Because Message parameters are based on document specific tables, the messages created are available to be used only by the document group for which they were created. A message created for a Statement can be used as the message when E Mailing statements. A message created for unposted Sales Transactions, however, can be used for all unposted Quotes, Orders, Invoice, Returns, and Backorders. A Message created for Historical Sales Documents may be used only for posted Quotes, Orders, Invoice, Returns, and Backorders. Messages for Purchase Orders may be used only for Purchase Order formats.**

Subject and Attachment Name Editor

The Subject and Attachment Name Editor Window is used to create the E Mail subject and attachment. This text can be manually entered text, or a combination of manually entered text and parameter fields added from specific report tables, system tables, and global fields. When the field is created and assigned to a particular document, Forms Printer will fill in any parameters using data associated with the document being E Mailed.

The screenshot below shows an example of a parameterized subject or attachment.
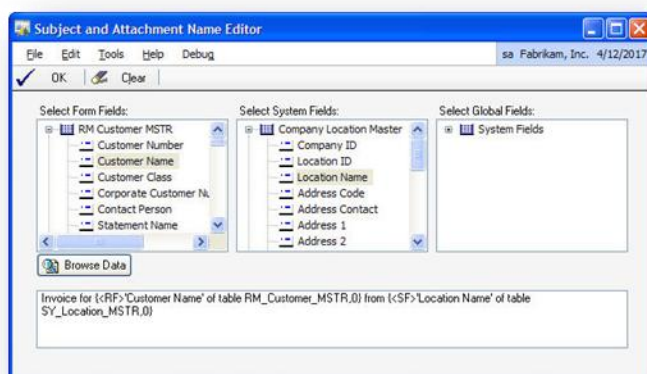
Window Navigation

To open the Forms Printer Setup window, use the following menu path in Dynamics GP:

Microsoft Dynamics GP > Tools > Setup > Company > Forms Printer

The screenshot below shows the menu path.
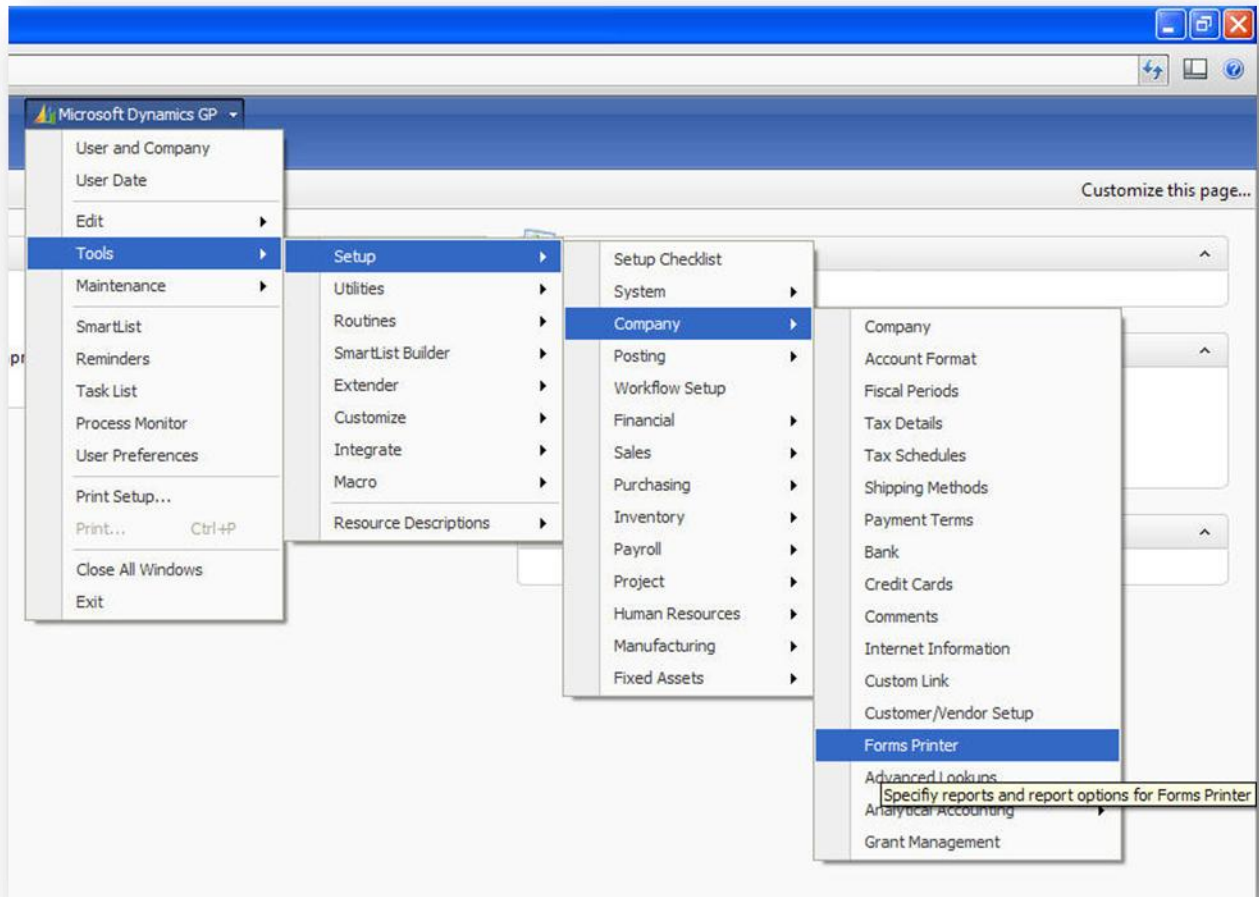
Printing Using the Delivery System

Once the Forms Printer Delivery System has been setup, you can print using the normal processes for each document type. When printing documents with Delivery System Options, you will be presented with the Report Destination window, with the destination choices of 'Screen', 'Printer or Delivery System', and 'File'.

Choosing **Screen** outputs the document to either the Crystal Reports or SRS Preview window.

Choosing **Printer or Delivery System** displays the Delivery System Dialog window. The Delivery System Dialog window allows you to select from 'Printer' or 'Delivery System'.

> Choosing **Printer** disregards the 'To File' and 'To Mail', as well as all of the Delivery System Master Record Setup options, and prints the report directly to the printer defined in the Delivery System Document Setup window.

> Choosing **Delivery System** allows Forms Printer to deliver each document to the destination defined in either the Delivery System Document Setup window.

Choosing **File** disregards the Delivery System Document Setup options, and exports the Report to the file and format selected in the Report Destination window. When choosing File, the Export Types dropdown list will display all of the available Report export types.

Crystal Reports Setup

The Crystal Reports provided with Forms Printer are samples, intended to be used as templates and are meant to be generic examples, rather than the solution to every printing situation. These reports will need to be modified in order to handle specific needs. Before modifying the sample reports, it is recommended that you have an understanding of Crystal reports. If you are unfamiliar with Crystal reports, the quick setup is the easiest way to get up and running with the sample reports. If your report modification includes adding tables to the sample reports, follow the instructions in the Modifying Sample Reports section pertaining to your database type.

Using Template Reports

The template reports installed with Forms Printer are "generic", that is: they are designed to work immediately after installation without the need for modification. Of course, you will at least want to make cosmetic changes to the logo and company name, etc. These changes can be made very simply without complex modification to the report.

However, if you are adding tables to the report, or making other more significant changes you must follow the report modification instructions in the Modifying Sample Reports section.

Installed Template Reports

The Forms Printer Crystal Reports templates are installed into the following folder:

> *[Dynamics GP Application Folder]*\Forms Printer\Crystal Report Templates

Within that subfolder are several subfolders for the supported Dynamics GP series.

Modifying Sample Reports

Step I

Make note of the settings for the DSN used by Microsoft Dynamics™ GP. (Start->Control Panel->Administrative Tools->Data Sources (ODBC)

Step II

Use similar settings to create a temporary named second DSN, using a unique name for the Data Source Name. For example, use ASIFPTemp. This temporary DSN may be set to use a Microsoft Dynamics™ GP company database (EX: TWO) as the default, but it is not required.

Step III
     a. Open the sample report using the Crystal Report Designer.
     b. From the toolbar, click Database.
     c. From the dropdown menu, select 'Set Datasource Location…'
     d. From the 'Replace with' list at the bottom of the window, expand 'Create New Connection'.

e. Expand 'ODBC (RDO)'.
f. From the ODBC (RDO) window, Select the ASIFPTemp DSN from the Data Source Name list, and then click 'Next'.
g. From 'Connection Information', enter a valid User ID and Password.
h. From the Database dropdown list, select your Company Database.
i. Click 'Finish'.
j. Back on the Set Datasource Location window, expand 'report' in the 'Current Data Source' list.
k. Highlight the DSN listed.
l. From the 'Replace with' list, highlight the ASIFPTemp DSN listed below 'ODBC (RDO).
m. When both DSNs have been highlighted, click 'Update'.
n. Click 'Close' when finished.

Step IV

Follow the Crystal Reports Application documentation for adding tables in the Crystal Report Designer using the ASIFPTemp DSN.

Step V

Save the Crystal Report in the directory used in the Forms Printer setup.

NOTE: Repeat Steps II through V for each Sample Report you need to modify.

Step VI

Once each of the reports you intend to modify have been corrected, delete the ASIFPTemp DSN created in Step I. This allows the generic report to be printed from multiple company databases using the DSN used to log into Microsoft Dynamics™ GP.

SQL Reporting Services Setup

Modifying Forms Printer SSRS Reports

The SQL Server Reporting Services (SSRS) reports that ship with Forms Printer are samples intended to be used as templates for designing reporting solutions. They will need to be modified before use with Forms Printer in a production environment.

The reports may be customized and deployed using the SQL Server Business Intelligence Development Studio application or the Visual Studio application.

Use the following steps to customize a Forms Printer SSRS report, and deploy it to your Report Server, for use by Forms Printer in Dynamics GP.

Installed Template Reports

The Forms Printer SQL Reporting Services templates are installed into the following folder:

> *[Dynamics GP Application Folder]*\Forms Printer\SRS Report Templates

Within that subfolder are several subfolders for the supported Dynamics GP series.

Steps for Customizing SRS Report Templates

1. Create New Report Server Project. Modification of an SSRS report first requires the creation of a new Report Server project in your application.
    a. Launch either Business Intelligence Development Studio or Visual Studio.
    b. Create a new Report Server project by using the Report Server template. The Report Server template can be found under Business Intelligence Projects in the New Project window.
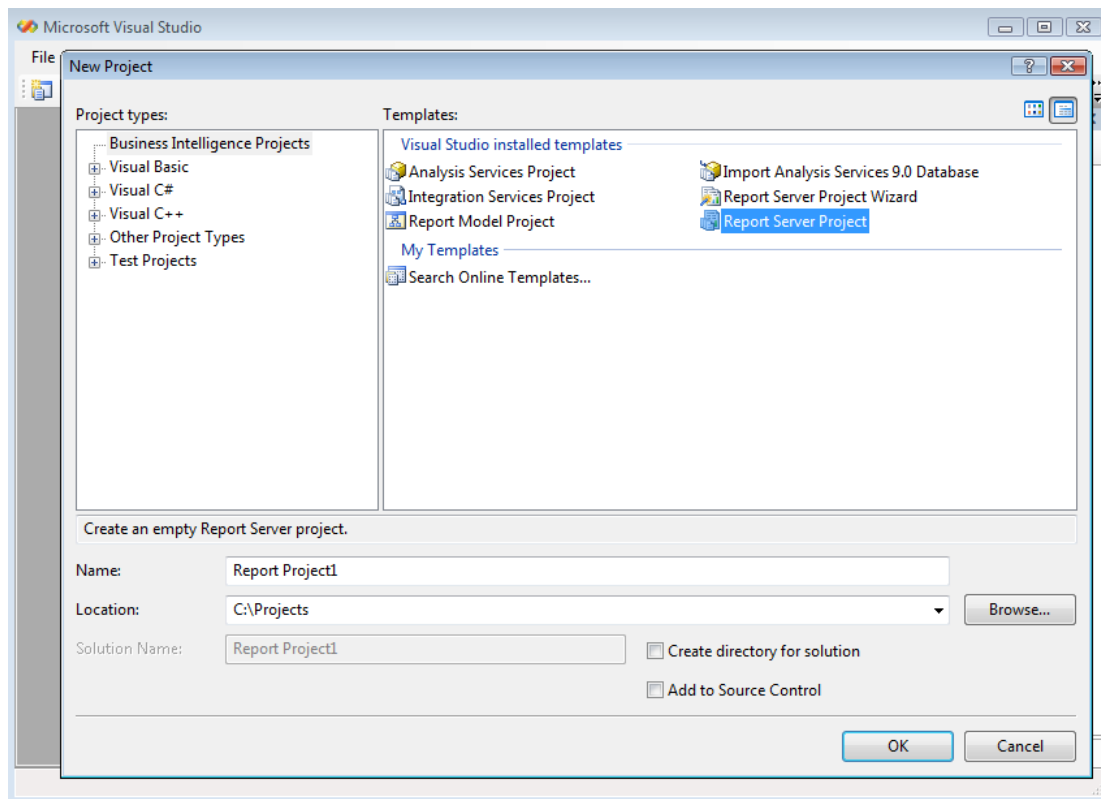
2. Create New Shared Data Source

All Forms Printer SSRS reports are configured to use a data source called **GPCompany** for data retrieval. You will need to create this data source in your project. The new data source should point to a Dynamics GP company database on your SQL Server. To create the data source, right click on the Shared Data Sources folder in the Solution Explorer window and select the context menu item to add a new data source. Name the data source **GPCompany** and set the connection string to point to a Dynamics GP company database in your SQL Server.
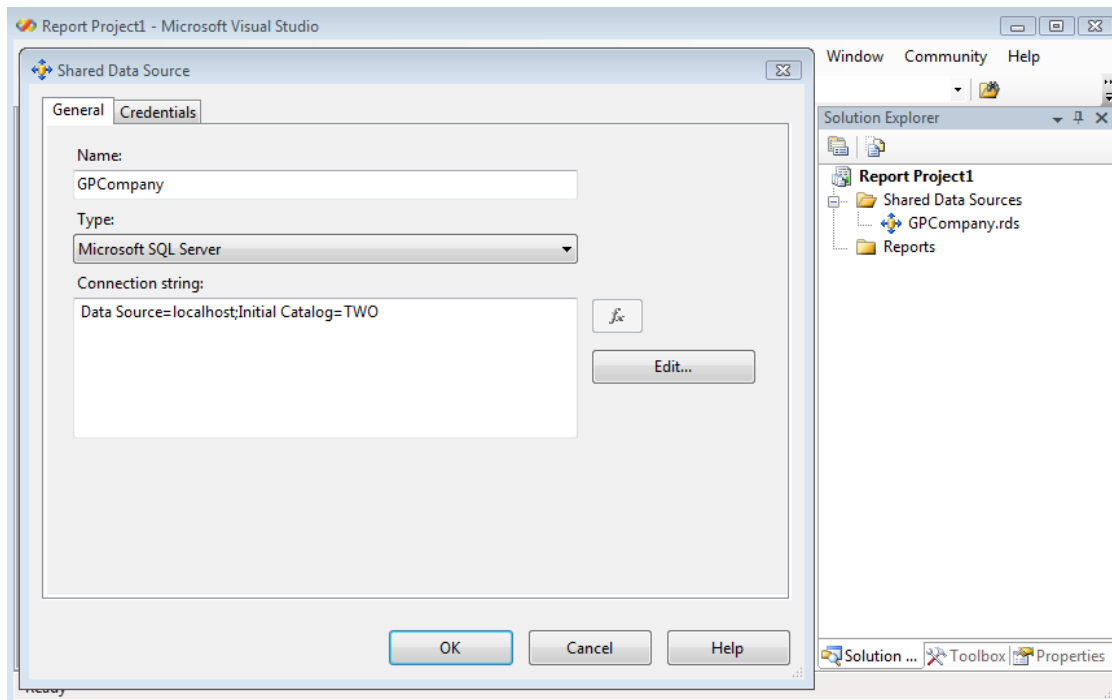
3. Add Forms Printer SSRS Report To Project

Next, you will need to add the SSRS report that you wish to modify into your project. In the **Solution Explorer** window, right click on the **Reports** folder and select **Add**, then **Existing Item**. Browse the file system to find the Dynamics GP install folder. The Forms Printer SSRS reports are located in Dynamics GP Series sub folders of the folder **SRS Report Templates**, a sub folder of the Dynamics GP client application folder.

Add the report(s) that you wish to modify. The report layout, and SQL query can then be modified as desired.
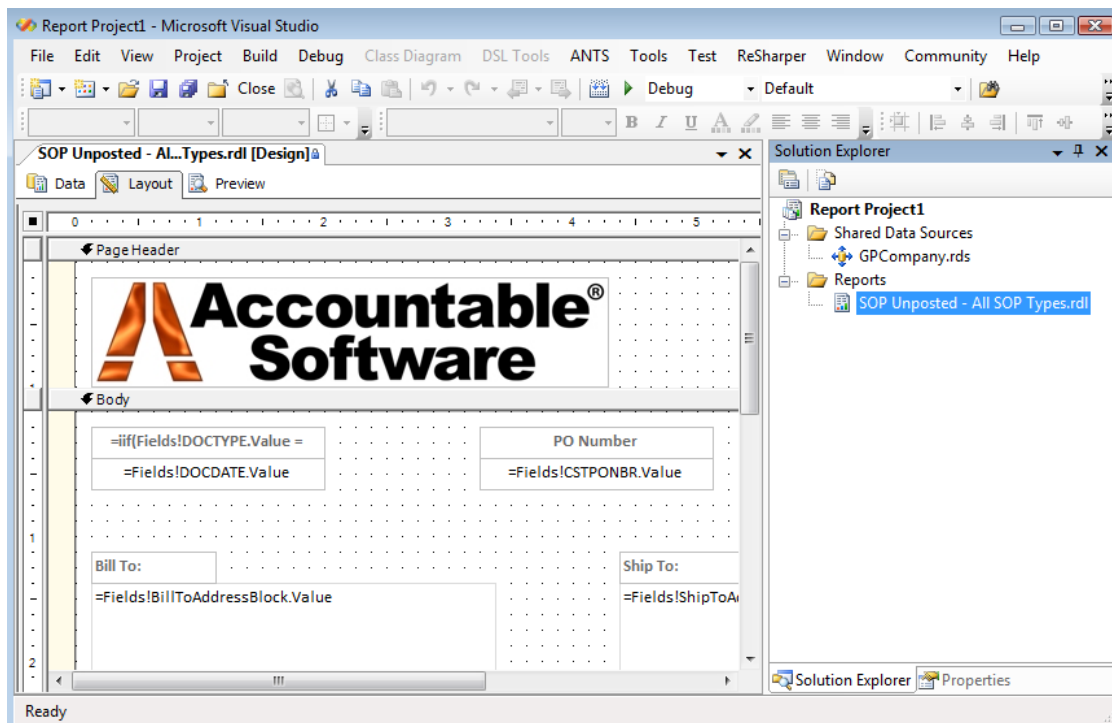
All parameters that are passed to each report by Forms Printer are already defined in the report. Note that the order and data type of the report parameters are important for proper execution of the report by Forms Printer.

4. Deploy Modified Report To Report Server

Once you have completed customizing the report, it can be deployed to your Report Server. Before deploying the report, configure the deployment properti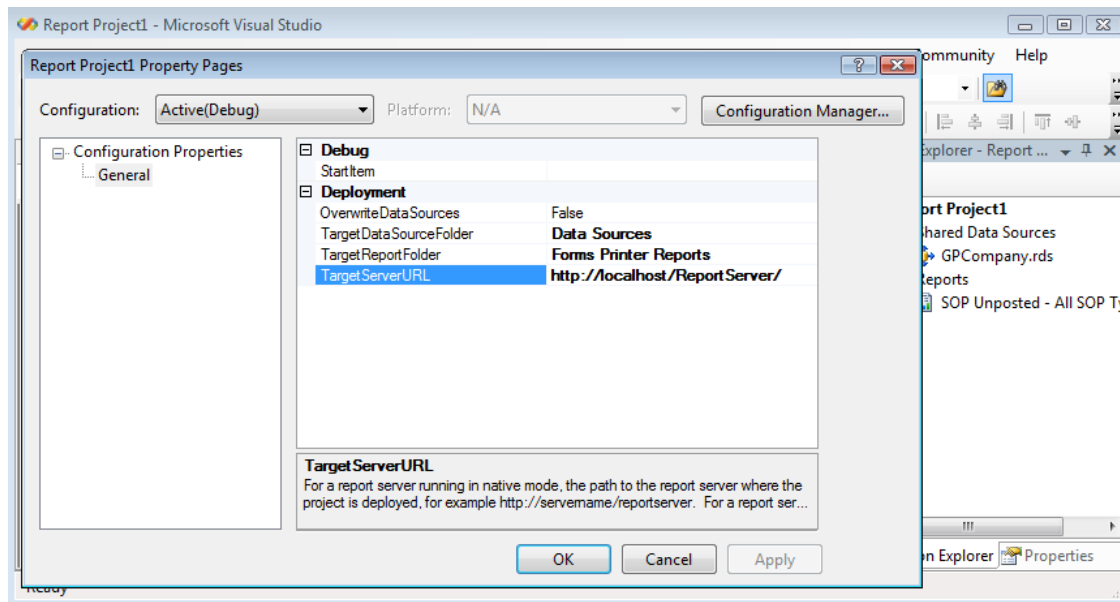es of the project in order to specify the location of the Report Server and the target folders on the Report Server for your report and data source. The deployment properties can be set by opening the project property page from the project menu or from the project folder context menu in the Solution Explorer window.

Once the deployment properties have been set, the report can be deployed to the Report Server by selecting Deploy from the Build menu or from the context menu of the report in the Solution Explorer window.

After the deployment has completed successfully, the report can be selected for use in the Forms Printer Setup window in Dynamics GP.

Deploying Unmodified Forms Printer SSRS Reports to a Report Server
There may be circumstances when you wish to deploy an unmodified Forms Printer SSRS report to your Reporting Services Report Server, for instance, when preparing a product demonstration. In such cases, the Reporting Services Report Manager web application can be used to perform the task. The Report Manager application allows report files to be uploaded to the Report Server database, which is equivalent to publishing the reports. Follow these steps to deploy a Forms Printer SSRS report to the Reporting Services Report Server, for later use by Forms Printer in Dynamics GP.

1. Upload Report File To Report Server

   Launch your web browser and navigate to the Reporting Services Report Manager web application. By default, the URL is **http://<servername>/Reports**. Click the **Upload File** link on the Contents tab of the Home page, or on any folder page. This will open the Upload File web page. Browse to the report file on your file system that you wish to upload and select it. The Forms Printer SSRS reports are located in the **Stub SRS Reports** folder beneath the Dynamics GP install folder.

   Press OK to upload the report file into the Report Server database.
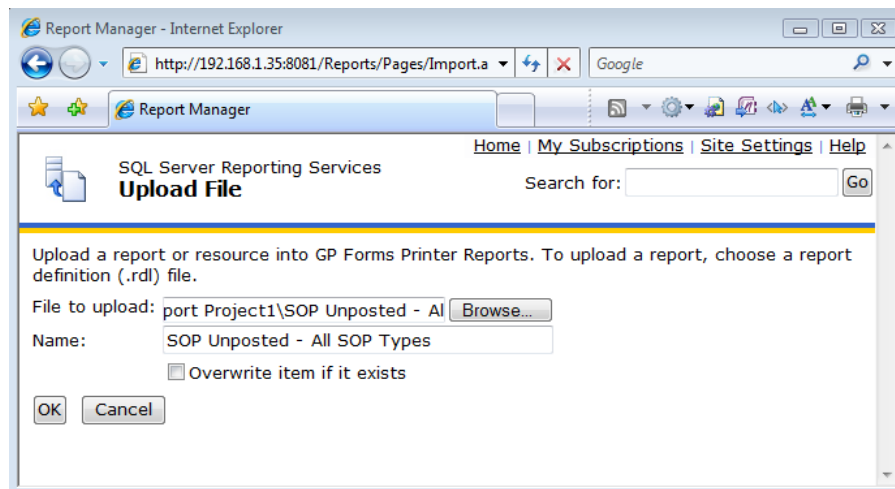
2. Configure Report Data Source

   Once a report has been published on the Report Server using the Report Manager, you will need to configure its data source. All Forms Printer SSRS reports are configured to use a data source called **GPCompany** for data retrieval. If this data source does not exist on your Report Server, then you can associate the report with any existing data source that points to a GP company database. To do this, click on the link for the report in Report Manager to open the report. Next click on the Properties tab at the top of the page, and then click on the Data Source tab at the side of the page. In the Data Sources page you can browse and select an existing GP company data source for your report.
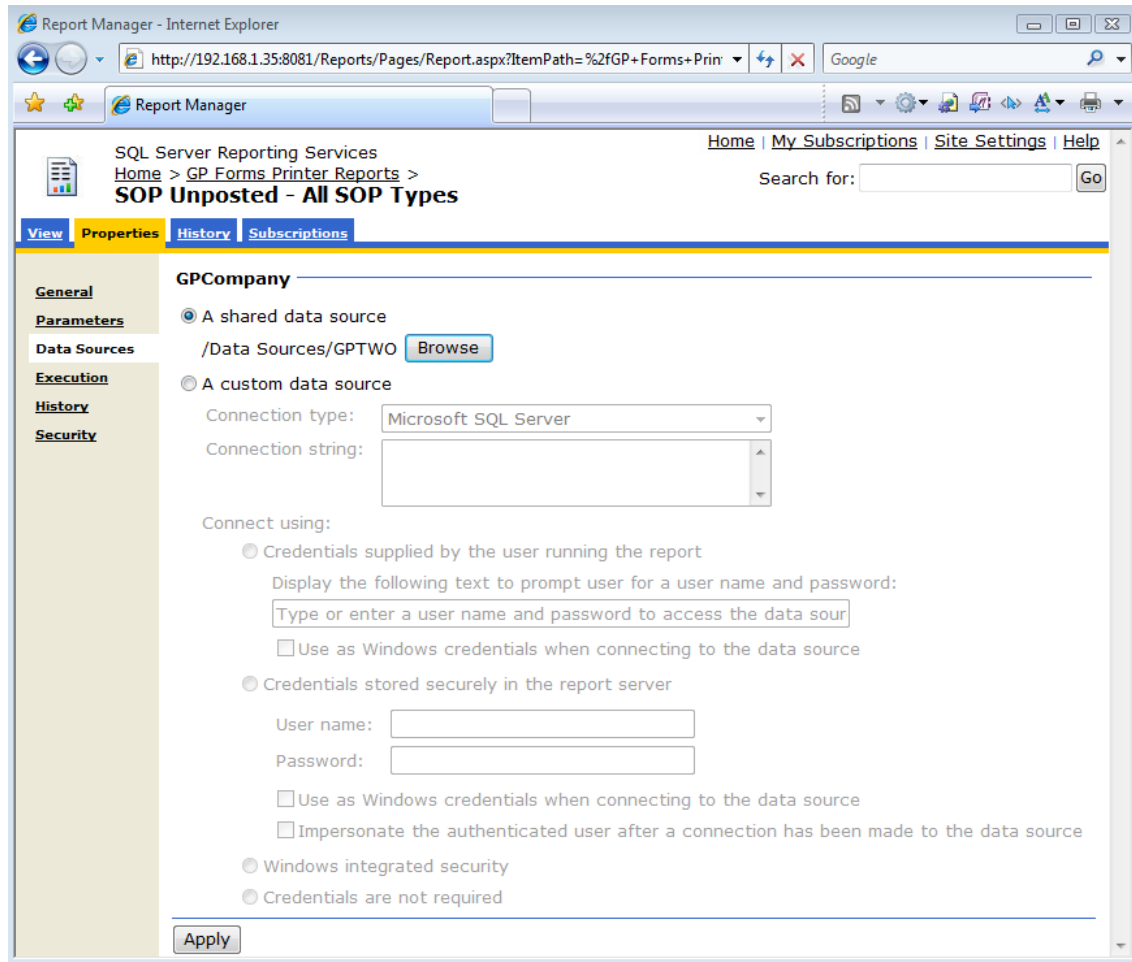
After you have applied the change to the data source of your report, the report is ready for use by Forms Printer. The report can be selected for use in the Forms Printer Setup window in Dynamics GP.

Multi Company SQL Server Reporting Services Reports
We recommend two techniques for configuring SSRS reports for use in a multi company environment.

1. Publish a Copy Of Each Report For Each Company
Using the Report Manager Web application, a report can be published to multiple folder locations on the Report Server, with each copy configured to use a different company specific data source.

2. Configure Each Report to Dynamically Select a Company at Run Time
Using the report designer application, the data source definition of the report can be modified to use the value of a report parameter, in order to specify the company database in which to execute the report query.

This will require changing the report from using a shared data source to using an embedded data source. The connection string of the embedded data source can be defined as an expression that dynamically

sets the company database from a report parameter value. Below is a screenshot of the Data source window using a dynamic connection string.
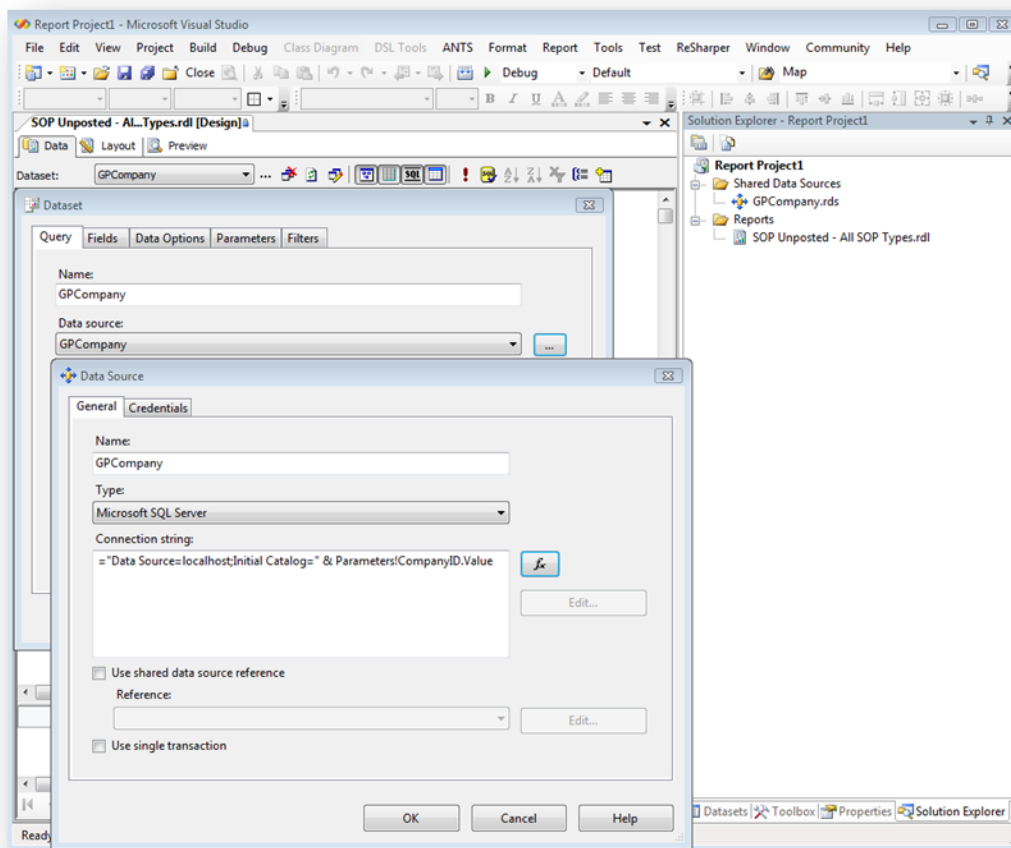
Use the following steps to configure a particular report to use a report parameter value for company selection:

1. Open the report in a Report Server project in Business Intelligence Development Studio or Visual Studio.
2. Select the Data tab of the report in the design surface.
3. Open the Dataset window for the **GPCompany** dataset, by clicking on the ellipsis button next to the Dataset drop down list in the Data tab.
4. Open the Data Source window for the dataset, by clicking on the Data Source ellipsis button in the Query tab of the Dataset window.
5. Uncheck the **Use shared data source reference** check box.
6. Set the data source type to Microsoft SQL Server.
7. Enter an expression for the connection string, setting the **Initial Catalog** to be the value of the report parameter that specifies the current company database in Dynamics GP:
8. **="Data Source=localhost;Initial Catalog=" & Parameters!CompanyID.Value**
9. Specify the credentials for the data source.
10. Save and publish the report to the Report Server.

Report Requirements and Considerations

The reports you choose to use when printing with Forms Printer can be simple modifications to the Crystal or SRS report templates shipped with Forms Printer or they can be created from scratch in your tool of choice.

In either case it is important to note that ALL Forms Printer reports have certain requirements and critical considerations regarding their design and content.

Report Requirements

The requirements for reports to be printed using Forms Printer are all based upon the report's parameters. Reports used in Forms Printer will error if the following parameter requirements are not met. The requirements are:

1. The Minimum Parameter Count - Your report may have more than the required parameters but may not have fewer than those indicated in the templates or errors will occur and the report will not print.
2. The Parameter Order
3. The Parameter's Data Type

Important Considerations

Along with Parameter Requirements, each report has important considerations which must be understood and in MOST cases, heeded so that the report can display as intended. These important considerations include:

1. Report Tables
2. Report Table Joins
3. Report Selection Criteria

While a report used in Forms Printer will not error without the suggested tables, joins and selection criteria, there is a VERY likely chance that the report will not display the correct data intended by the Dynamics GP printing process if any of these considerations are not followed.

Troubleshooting Guide

Initialization Error

The Add-In Initialization Error occurs when there is a mismatch between the Forms Printer Add In dlls and the Forms Printer dictionary (.dic) file versions. The most likely cause of this is error is that the Forms Printer FPD1230.dic and ASI1655.dic files were not removed from the Dynamics GP client directory after the installation process and prior to launching Dynamics GP.

The error dialog is shown
below:
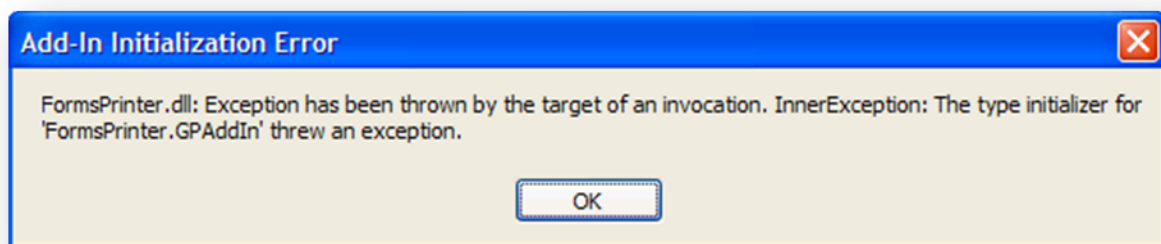
You can correct the error by removing, or renaming the FPD1230.dic and ASI1655.dic files and then launching Dynamics GP again.

Installation Errors

SQL Installation Errors

If you receive an unsuccessful message when installing on a SQL database, you may be able to determine what SQL Table or Stored procedure is causing the initialization to fail by using "Dexterity SQL Logging" on the workstation on which you are trying to initialize. This is done by editing the [General] section of the DEX.INI file to include the following lines:

- SQLLogPath=c:\
- SQLLogSQLStmt=TRUE
- SQLLogODBCMessages=TRUE

Then log into Microsoft Dynamics™ GP and attempt to Initialize Forms Printer- a log file named c:\dexsql.log will be created, and if you open it with notepad at the point of the error, you will see the SQL statement that caused the error: You may be able to delete the ASI123* table (if it contains no data) and its associated zDP_ASI123* stored procedures and then try again and see if you get past the issue.

If you can send that dexsql.log to us, we may be able to determine what is happening.

NOTE: After logging out of Microsoft Dynamics™ GP, be sure to remove the lines above from DEX.INI or set them to FALSE so as to not affect performance of your system or fill up your disk with the log file.

Registration Errors

When entering Registration keys, a failure to register warning typically occurs for 3 main reasons:

Cause	Resolution
Mistyped Registration Keys	Double check the keys entered and use cut and paste if possible.
Incorrect Site name	Double check the site name on the Registration Keys document provided by Accountable Software. If there is a discrepancy from your actual Site name, contact us to receive a new set of keys.
Incorrect User Count	Double check the number of licensed users enabled by the keys issued and compare to your number of System Manager users. If the keys enable fewer users you will need to contact Accountable for new keys.

Report Parameter Errors

The error **ASI_SetParameters** shown below occurs when the report being printed has fewer parameters than is expected by Forms Printer.

This error is followed by the dialog below which displays the **ParamNumber**, and the **ParamValue**.
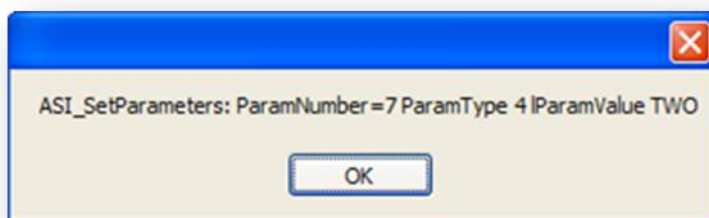
ParamNumber indicates which Parameter on the report has the issue. **ParamValue** indicates the value that was passed to that report parameter.

To correct report parameter issues, compare the parameters of the report being printed to the matching template report shipped with Forms Printer.

Email Setup Errors

In order to function properly, Forms Printer must find an Address list for possible mail source addresses. By default, it attempts to use Outlook and an Address List named "Global Address List", which exists by default in Microsoft Exchange environments. If Outlook or this address list is not found, errors will occur during Forms Printer Setup.

The symptom, possible cause and resolution are listed below:

Symptom	Cause	Resolution
	Outlook is not installed or in use on the Client machine.	If you are not using Outlook as your Mail Client, you may set the ASIFPUseOutlook Dex.ini setting to FALSE. This will disable the Outlook option completely, and Forms Printer will not try to connect to Outlook in any way.
Error "Can't get address list object with this name from Redemption object" or similar. Some functionality of Mail delivery is restricted similar to the restrictions for Crystal MAPI.	The client machine failed to retrieve the Exchange Server Global Address List	The cause of the dialog is that Forms Printer is unable to retrieve the Required Address List while communicating with Outlook. You can change which Address List Forms Printer attempts to use by changing the **ASIFPOutlookFolder** setting in the Dex.ini file. The list name entered in the Dex.ini must be a valid Outlook Address List. For Example, you could change the list to the Outlook 'Contacts' list by changing the Dex.ini setting to: **ASIFPOutlookFolder = Contacts** where by default it is **ASIFPOutlookFolder = Global Address List**. If your environment is such that you cannot create a Contacts or other common address list that would be available on each workstation, you can set the Address List to use to be "**ASIFPOutlookFolder=NONE** which will preserve most functionality, but only allow sending from "Default Outlook User". This option is useful when using Outlook Offline while testing or demoing Forms Printer.

Invalid TLV Record Error

When using Crystal Reports as the reporting engine, the "Invalid TLV Record" error is displayed for two known reasons:

Cause	Resolution
The Crystal Report rpt file was saved using a Crystal Reports application version that is not compatible with the version of Crystal Reports dlls registered on the workstation.	Re-run the Forms Printer install on the workstation, ensuring the correct Forms Printer and version of Crystal Reports is used. Or Open and save the report in a version of Crystal compatible with the version installed on the workstation. **NOTE:** Advanced users may wish to use the Registry Editor to check the registered version of the Crystal dlls. That version can be found in the key: HKEY_CLASSES_ROOT\CrystalRuntime.Application\CurVer
The Crystal Reports dlls registered on the workstation do not match those installed to the Dynamics GP folder and being used by Forms Printer. Note that this occurs when an installation discrepancy between Crystal Reports XI and Crystal Reports XI "R2" (release 2) exists.	Replace the dlls in the Dynamics GP folder with the version that matches the currently registered Crystal dlls. To replace these files first requires that the version registered is identified. To do this, advanced users can use the Registry and follow these steps: 1. Find the key: **HKEY_CLASSES_ROOT\CrystalRuntime.Application.11\CLSID** 2. Copy the listed GUID 3. Search for that GUID under the key: **HKEY_CLASSES_ROOT\CLSID** 4. When found, expand to see the folder **InprocServer32** 5. Click on the folder to see the results on the fight hand pane 6. Check the **Data** column value. Here will be displayed a path to the registered Crystal dlls. If the path is: *<drive>:\Program Files\Common Files\Business Objects\\3.0\\bin\craxdrt.dll* Then the registered version is **Crystal XI "r1"** If the path is: <drive>: *Program Files*Business Objects\Common\3.5\bin\craxdrt.dll Then the registered version is **Crystal XI "r2"** The resolution to this issue is to replace all dll files in the Dynamics GP client folder that begin "CRPE" with the correct version identified by the above procedure. The correct version of these files can be found at the paths listed above in blue. B sure to copy the matching version identified in the registry.
Blank Statement	

Frequently Asked Questions

Question: **What version of Crystal Reports does Forms Printer install and support?**

Answer: As of version 10.50 and greater, Forms Printer installs version XI (11) r2 of Crystal Reports. That installation means that Forms Printer is compatible with versions 9, 10 and 11 (r1 and r2) of Crystal reports. So, any reports designed in any of those versions can be run with Forms Printer version 11.00.

Question: **If we purchase Forms Printer do we also have to purchase Crystal Reports?**

Answer: Forms Printer installs all of the files required to run a Crystal Report on a client workstation that is running Dynamics GP. In order to modify or create Crystal Reports you would typically purchase at least one copy of Crystal Reports and install it on the report designer's workstation. No other Dynamics GP users would need a Crystal License.
Note: Crystal Reports licensing varies in the Terminal Server / Citrix environment. Please contact Business Objects for details on licensing compliance if using either of those environments.

Question: **Do we have to purchase Adobe Acrobat Writer to print to PDF with Forms Printer?**

Answer: No. Forms Printer installs the Crystal runtime components and SQL Reporting Services files needed to export to PDF. No additional license or product is needed.

Question: **I don't see the report I want to print when I go Into Forms Printer Setup, why not?**

Answer: Forms Printer prints a very specific list of reports. If the report is not listed in the Forms Printer setup window, it cannot be printed by Forms Printer. If this report is critical to your needs, please contact Accountable Software and we can discuss the possibility of adding it.

Question: **How do I know if I need new Registration Keys for Forms Printer?**

Answer: New registration keys are required whenever you are installing a newer major version release of Dynamics GP, whenever you are increasing your number of System Manager user licenses, and when your Registered Dynamics GP Site name is changed.

Question: **What version of SQL Server does Forms Printer support?**

Answer: When using the Crystal Reports Engine, SQL Server 2000 and higher are compatible with Forms Printer.
In order to use SQL Reporting Services as the Reporting Engine you must be using SQL 2005 or higher.

Question: **Can I email using a Mail Client other than Outlook?**

Answer: Forms Printer includes specific functionality to support Outlook and can only use Outlook when using the SQL Server Reporting Services Engine.

When using the Crystal Reports Engine and Crystal MAPI, any E Mail client supported by Crystal Reports can be used. Consult Business Objects' documentation for Email clients supported by Crystal Reports.

Question: **Why are there tables with names that begin with "ASI" in the report templates?**

Answer: In order to mimic the functionality of the Dynamics GP printing processes, Forms Printer must often create SQL Tables to store data that is generated during the Dynamics GP print process. When a template contains an "ASI" named table, it is typically required in order to properly print the report.

Question: **Can bar codes be used on Crystal Reports?**

Answer: Yes. In order to use a bar code, you need to have a barcode font installed on all workstations that will print using Forms Printer, and you must modify your report to use that bar code font for the field(s) to be bar coded. Typically, you would use a calculated field that displayed the correct start and stop characters for the desired bar code type.

Question: **Which Forms Printer Report Setup name maps to which Check Format?**

Answer: From the Print Payroll Checks window, you will see displayed the list of Check Formats. Below is a list of these formats with their corresponding Forms Printer Setup name:

Check Format	Forms Printer Setup Name
Stub on Top - Continuous	Employee Checks Stub on Top-D
Stub on Bottom - Continuous	Employee Checks Stub on Bottom-D
Stub on Top and Bottom – Single Feed	Employee Checks Stub on Bottom-L
Other - Continuous	Employee Checks Other -D
Other - Single Feed	Employee Checks Other -L

Question: **Which Forms Printer Report template maps to which Project Accounting Report?**

Answer: A list at the end of this document includes all of the Forms Printer Template file names and their corresponding Project Accounting Report.

Question: **Can Crystal Reports print a MICR bar code?**

Answer: Yes. In order to use the MICR Font for check printing, you must purchase and install a version of the MICR font then set the MICR field on the Crystal Report to use this Font Type. When printing MICR Checks, it is also necessary to have a MICR toner cartridge installed in the printer. You may also want to purchase special Non-duplicatable paper for your check stock.

Sources for MICR and barcode fonts:
http://www.bizfonts.com
http://www.micrfonts.com
http://www.adobe.com/type/main.html
These sources are provided for information only. Accountable Software does not endorse or support specific products from these companies.

Contacting Technical Support

Accountable Software Technical Support is available Monday through Friday from 9:00 am to 5:00 pm EST. Technical Support can be reached in the following ways:

610.983.3100 (voice)

610.983.3120 (fax)

TechSupport@accountable.com

http://www.accountable.com

When you call, fax, or Email Accountable Software for support, please include the following information:

- Your name
- Your company name and phone number
- The name of the product you are working with and the version you are running (from the registration window)
- A brief description of the problem.

In addition, have this manual available when you are connected with Customer Support. You may be directed to various pages in the manual as you receive assistance.

Please also be aware that all technical support issues are chargeable unless the issue you are calling about is a result of a defect in an Accountable Software product or accompanying documentation. Customers without pre-paid support incidents, will be required to provide credit card information prior to opening an incident, but will not be charged if the call is non-billable.

 For the latest Accountable Software Support Policies, see the "Support" section of the Accountable Software Web site at www.accountable.com.

Project Accounting Report Mapping

Below is the list of Sample reports and the Project Accounting report these samples are designed to support. It is important during Forms Printer setup, that the correct sample report be used when creating these mappings. These reports are **not** interchangeable, you must use the correct report or you will receive no data, incorrect data or an error.

Billing Format Name	Forms Printer Setup / Report Writer Name	Forms Printer Template Report Name
T&M Summary A	PA Billing Summary A Report Format	PA Billing Summary A.rpt
T&M Summary B	PA Billing Summary B Report Format	PA Billing Summary B.rpt
T&M Summary C	PA Billing Summary C Report Format	PA Billing Summary C.rpt
T&M Detailed A	PA Billing Detailed A Report Format	PA Billing Detailed A.rpt
T&M Detailed B	PA Billing Detailed B Report Format	PA Billing Detailed B.rpt
T&M Detailed C	PA Billing Detailed C Report Format	PA Billing Detailed C.rpt
T&M Consulting Project	PA Billing Invoice Format - Invoice Format 1	PA Billing Invoice Format 1,2,5,6.rpt
T&M Consulting Project With Tax Detail	PA Billing Invoice Format - Invoice Format 2	PA Billing Invoice Format 1,2,5,6.rpt
T&M Consulting Contract	PA Billing Invoice Format - Invoice Format 3	PA Billing Invoice Format 3,4,7,8.rpt
T&M Consulting Contract With Tax Detail	PA Billing Invoice Format - Invoice Format 4	PA Billing Invoice Format 3,4,7,8.rpt
T&M Detailed Project	PA Billing Invoice Format - Invoice Format 5	PA Billing Invoice Format 1,2,5,6.rpt
T&M Detailed Project With Tax Detail	PA Billing Invoice Format - Invoice Format 6	PA Billing Invoice Format 1,2,5,6.rpt
T&M Detailed Contract	PA Billing Invoice Format - Invoice Format 7	PA Billing Invoice Format 3,4,7,8.rpt
T&M Detailed Contract with Tax Detail	PA Billing Invoice Format - Invoice Format 8	PA Billing Invoice Format 3,4,7,8.rpt
T&M Pre-Billing Worksheet	PA Billing Invoice Format - Invoice Format 9	PA Billing Invoice Format 9-14.rpt
T&M Basic	PA Billing Invoice Format - Invoice Format 10	PA Billing Invoice Format 9-14.rpt
T&M Invoice 1	PA Billing Invoice Format - Invoice Format 11	PA Billing Invoice Format 9-14.rpt
T&M Invoice 2	PA Billing Invoice Format - Invoice Format 12	PA Billing Invoice Format 9-14.rpt
T&M Invoice 3	PA Billing Invoice Format - Invoice Format 13	PA Billing Invoice Format 9-14.rpt
T&M Invoice 4	PA Billing Invoice Format - Invoice Format 14	PA Billing Invoice Format 9-14.rpt
CP/FP Document Level Invoice	PA Invoice Format CP/FP Document Level Invoice	PA Invoice Frmt CP-FP.rpt
CP/FP Contract Level Invoice	PA Invoice Format CP/FP Contract Level Invoice	PA Invoice Frmt CP-FP.rpt
CP/FP Project Level Invoice	PA Invoice Format CP/FP Project Level Invoice	PA Invoice Frmt CP-FP.rpt
CP/FP Contract/Project Level Invoice		PA Invoice Frmt CP-FP.rpt

Billing Format Name	Forms Printer Setup / Report Writer Name	Forms Printer Template Report Name
CP/FP Pre-Billing Worksheet	PA Invoice Format CP/FP Pre Billing Worksheet	PA Invoice Frmt CP-FP.rpt
CP/FP Basic	PA Invoice Format CP/FP Basic	PA Invoice Frmt CP-FP.rpt
CP/FP Invoice 1	PA Invoice Format CP/FP Invoice 1	PA Invoice Frmt CP-FP.rpt
CP/FP Invoice 2	PA Invoice Format CP/FP Invoice 2	PA Invoice Frmt CP-FP.rpt
Fee Document Level Invoice	PA Invoice Format Fee Document Level Invoice	PA Invoice Frmt Fee Document Level.rpt
Fee Contract Level Invoice	PA Invoice Format Fee Contract Level Invoice	PA Invoice Frmt Fee Contract Level.rpt
Fee Project Level Invoice	PA Invoice Format Fee Project Level Invoice	PA Invoice Frmt Fee Project Level.rpt
Fee Contract/Project Level Invoice	PA Invoice Format Fee Contract/Project Level Invoice	PA Invoice Frmt Fee Contract - Project Level.rpt
Detail Page - Document Level Invoice	PA Invoice Format Document Detail Page 1	PA Invoice Doc, Con, Proj, Con-Proj Detail.rpt
Detail Page - Contract Level Invoice	PA Invoice Format Contract Detail Page 1	PA Invoice Doc, Con, Proj, Con-Proj Detail.rpt
Detail Page - Project Level Invoice	PA Invoice Format Project Detail Page 1	PA Invoice Doc, Con, Proj, Con-Proj Detail.rpt
Detail Page - Contract/Project Invoice	PA Invoice Format Contract/Project Detail Page 1	PA Invoice Doc, Con, Proj, Con-Proj Detail.rpt
Summary Page - Document Level Invoice 1	PA Invoice Format Document Summary Page 1	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Document Level Invoice 2	PA Invoice Format Document Summary Page 2	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Document Level Invoice 3	PA Invoice Format Document Summary Page 3	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Document Level Invoice 4	PA Invoice Format Document Summary Page 4	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Document Level Invoice 5	PA Invoice Format Document Summary Page 5	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Contract Level Invoice 1	PA Invoice Format Contract Summary Page 1	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Contract Level Invoice 2	PA Invoice Format Contract Summary Page 2	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Contract Level Invoice 3	PA Invoice Format Contract Summary Page 3	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Contract Level Invoice 4	PA Invoice Format Contract Summary Page 4	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Contract Level Invoice 5	PA Invoice Format Contract Summary Page 5	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Project Level Invoice 1	PA Invoice Format Project Summary Page 1	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Project Level Invoice 2	PA Invoice Format Project Summary Page 2	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Project Level Invoice 3	PA Invoice Format Project Summary Page 3	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Project Level Invoice 4	PA Invoice Format Project Summary Page 4	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
Summary Page - Project Level Invoice 5	PA Invoice Format Project Summary Page 5	PA Invoice Frmt Doc, Con, Proj Sum Pg1-5.rpt
IV Document Level Invoice	PA Invoice Format IV Document Level Invoice	PA Inv Frmt IV Document Level.rpt
IV Contract Level Invoice	PA Invoice Format IV Contract Level Invoice	PA Inv Frmt IV Contract Level.rpt
IV Project Level Invoice	PA Invoice Format IV Project Level Invoice	PA Inv Frmt IV Project Level.rpt
IV Contract/Project Level Invoice	PA Invoice Format IV Contract/Project Level Invoice	PA Inv Frmt IV Cont-Proj Level.rpt

Billing Format Name	Forms Printer Setup / Report Writer Name	Forms Printer Template Report Name
GST PA Billing Blank Invoice Form	GST PA Billing Blank Invoice Form	PA Billing GST Invoice.rpt
GST PA Billing Blank Return Form	GST PA Billing Blank Return Form	PA Billing GST Invoice.rpt
GST PA Billing Blank History Invoice Form	GST PA Billing Blank History Invoice Form	PA Billing GST Invoice.rpt
GST PA Billing Blank History Return Form	GST PA Billing Blank History Return Form	PA Billing GST Invoice.rpt
PO Format A (Project Accounting Only)	PO Format A	PA PO Format 1-3.rpt
PO Format B (Project Accounting Only)	PO Format B	PA PO Format 1-3.rpt
PO Format C (Project Accounting Only))	PO Format C	PA PO Format 1-3.rpt