

Forms Printer User Guide

for Dynamics GP 2013

Forms Printer Build

Version: 12.00.149

System Requirements

Microsoft Dynamics GP 2013
(desktop client, web client)

Microsoft SQL Server 2005 or Higher

Reporting Services 2005 or Higher with
Report Manager for SQL Reporting Services
functionality
or
Crystal Reports Version 9.0 or Higher

Contact Us

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A Guide for the Administration, Installation & Implementation of Forms Printer Forms Printer Plus And Forms Printer for Web Client

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Understanding Forms Printer Modules

This document refers to Forms Printer and to its three separately licensed modules that are included within the installation of Forms Printer. Those modules are:

Forms Printer Base System

The Base System allows you to control delivery of very specific documents in the main Dynamics GP product. This integration is very seamless and allows for processing of these documents by batch, range and in every GP window that supports that document type. The list of supported documents includes: SOP, POP, RM Transactions, RM Statements, Invoicing Module Invoices, and Payroll and Payables Checks.

Forms Printer Base System DOES NOT include the functionality of Forms Printer Plus or Forms Printer for Project.

Form Printer Plus

Forms Printer Plus allows printing of documents not integrated to by Forms Printer Base System or Forms Printer for Project, allowing you to define the window and button that will launch the report. This can include windows from Add-On modules, 3rd party products and customizations.

The Forms Printer Plus module includes the functionality of the Forms Printer Base System but DOES NOT include the functionality of Forms Printer for Project.

Forms Printer for Project Accounting

Forms Printer for Project Accounting allows a tight integration to the Project Invoice and PO printing processes and offers delivery of these documents just as the Base System offers.

Forms Printer for Project DOES NOT include the functionality of Forms Printer Base System or Forms Printer Plus.

Forms Printer for Web Client

Forms Printer for Web Client allows a LIMITED set of Forms Printer features to be available in the Dynamics GP Web Client. A license for the Forms Printer for Web Client is available for each license of Forms Printer Base, Project or Plus that is installed.

It is important to understand the integration of the Forms Printer Base System and Forms Printer for Project and how those integrations relate to the printing of their respective documents as well as understanding the capabilities and limitations of Forms Printer for Web Client. Please contact our sales and / or support teams with any questions on which module will be most productive for your needs.

Any reference to Forms Printer without a module qualification is intended to indicate that the information applies to all of the modules.

Installation of Forms Printer

The installation process detailed below applies to all of Forms Printer whether you will be using Forms Printer Base System, Forms Printer for Project Accounting, Forms Printer Plus or Forms Printer for Web Client.

The initial installation of Forms Printer is performed in several steps, which are:

1. First is the installation of the initial Forms Printer client application.
2. Included Forms Printer client code in the Microsoft Dynamics™ GP client application set.
3. Initiate the installation of SQL Server objects and data.
4. The Forms Printer Registration keys are entered to enable the application.
5. Finish the installs and setup. Once Forms Printer is registered, the next three setup steps can be completed in whatever order you wish. These steps are:
 - Install additional workstations with the client application
 - Enter Roles and Tasks in the new Dynamics GP security models
 - Add Report Engine Setup information.

Installation Checklist

Step	Description	X
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.	Launch Dynamics GP using an Administrative user	☐
5.	Include new code	☐
6.	Install and Initialize tables in first Company	☐
7.	Enter registration keys	☐
8.	Install and Initialize tables in additional Companies	☐
9.	Add Dynamics GP Roles and Tasks	☐
10.	Enter Report Engine Setup Information	☐
11.	Enter Email From Choice	☐
12.	Enter Forms Printer Setup Information	☐
13.	Add Reports to Forms Printer	☐

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>.

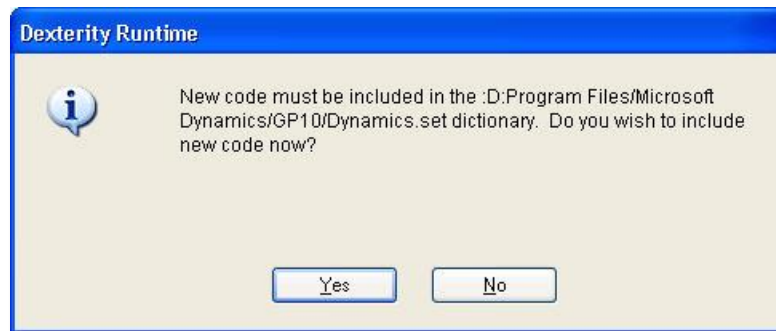
- g. The installation complete window is displayed.

When ready, click Close.

Include Forms Printer in the Dynamics GP Installation

1. Launch Microsoft Dynamics™ GP as Administrator (or user with administrative privileges)
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 in companies other than the Lesson Company. 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**. 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.
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. Be sure to install the same version on all 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 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.

Include Forms Printer in the Dynamics GP Installation

1. Launch Microsoft Dynamics™ GP as Administrator (or a user with administrative privileges).
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 Programs and Features 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

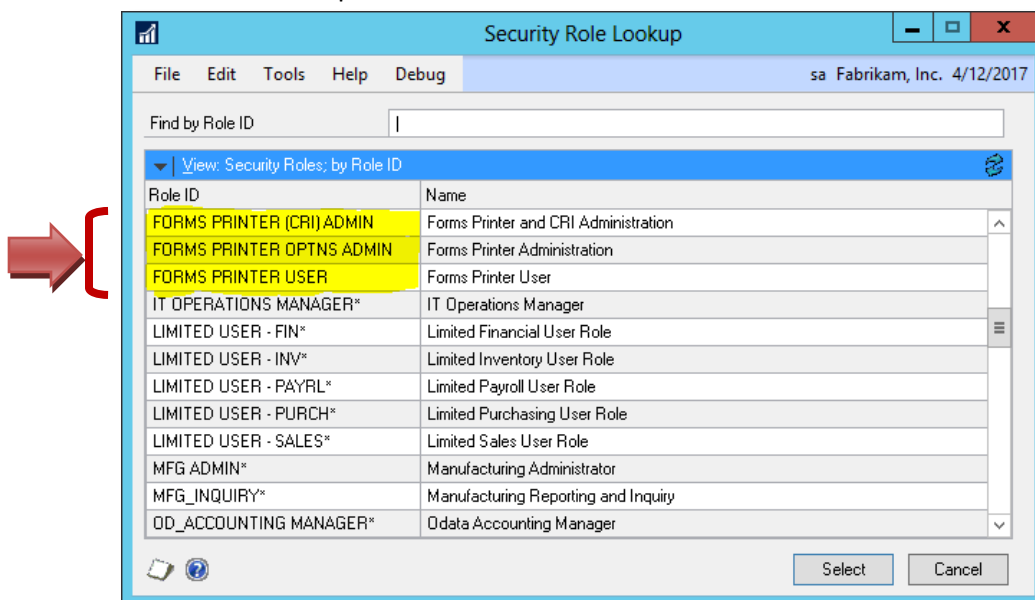
This role allows administration of the “Custom Report Integration” (CRI) settings that Forms Printer uses to connect the Crystal Reports Reporting Engine to the SQL database.

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.

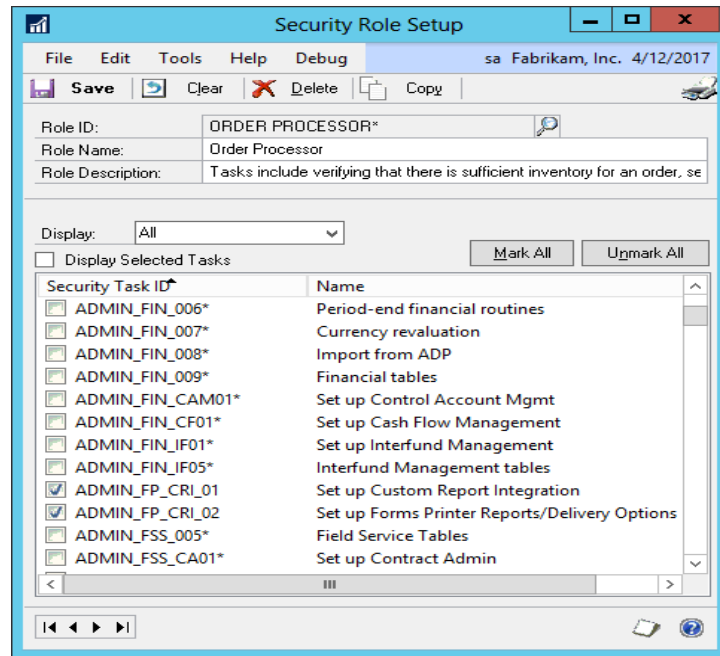
FORMS PRINTER USER

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.



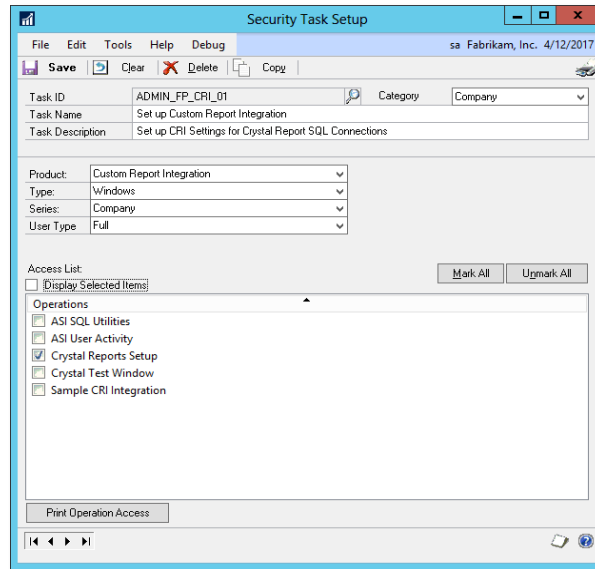
All GP users who need to use Forms Printer should have at least the FORMS PRINTER USER Role added to their user security role list. If all users need access to Forms Printer printing, one can add the Forms Printer Security Tasks directly to a broadly applicable role which many users already have been 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:

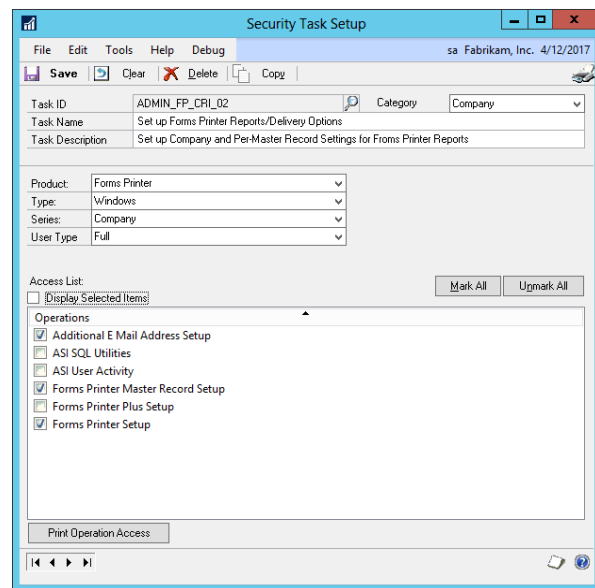


Tasks

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 the user 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 or the Forms Printer Plus 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.

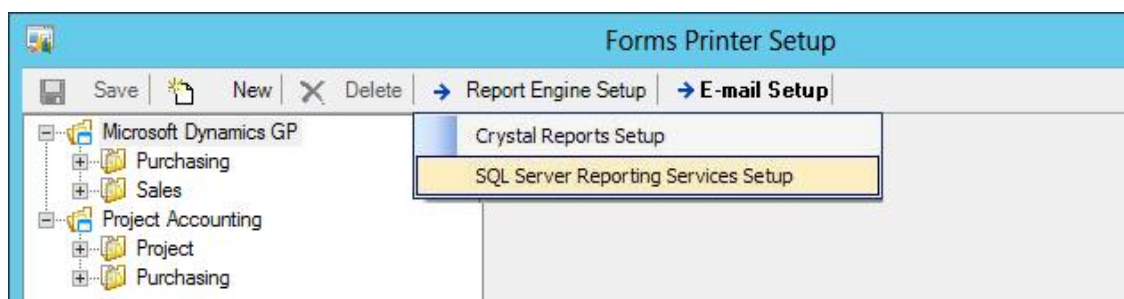
Note: You may use both the Crystal and SRS Reporting Engines with different reports setup to use either engine.

Window Navigation

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

On the 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 Crystal Reports Setup Window include:

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

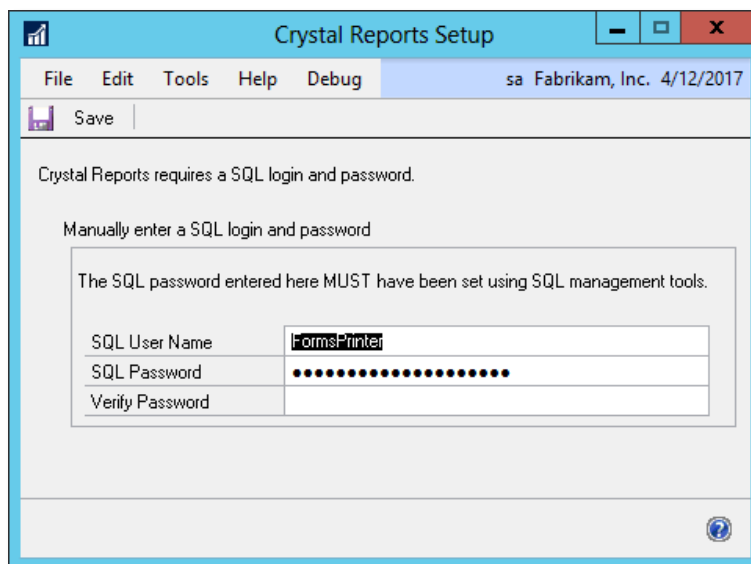
Window Fields

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 “FormsPrinter”.



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:

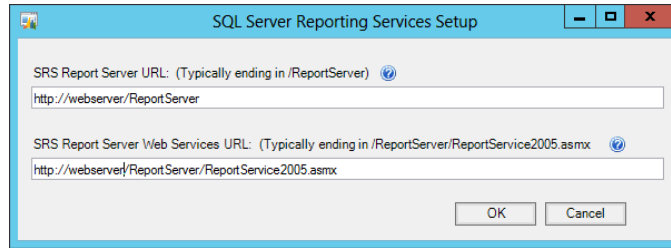
Buttons	Description
OK	Saves the current entry values and closes the Window.
Cancel	Closes the window without saving any changes to the current entry values.

Window Fields

Fields	Description
SSRS Report Server URL	This editable text field is used to enter the path to the Report Server Web Application.
SSRS 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 “webserver”.



Note: The SRS Report Server Web Services URL typically would begin with the same value as the SRS Report Server URL and it must end with either “ReportService2005.aspx” no matter which version of SSRS you are using unless you have a SharePoint integrated version, in which case it should end with “ReportService2006.aspx”.

Enter E-mail Setup Information

Before you can setup Forms Printer's Email delivery, you must complete the Email From Setup. That is, the list of potential Email addresses your Emails would come from. For example, you might want the Email to always come from the sending user, you might want to retrieve a list of possible from Email addresses from your Exchange Server, or you may wish to have a small, controlled list of from addresses in the case where you want Emails to come from "Sales" or "Customer Service" rather than an individual user.

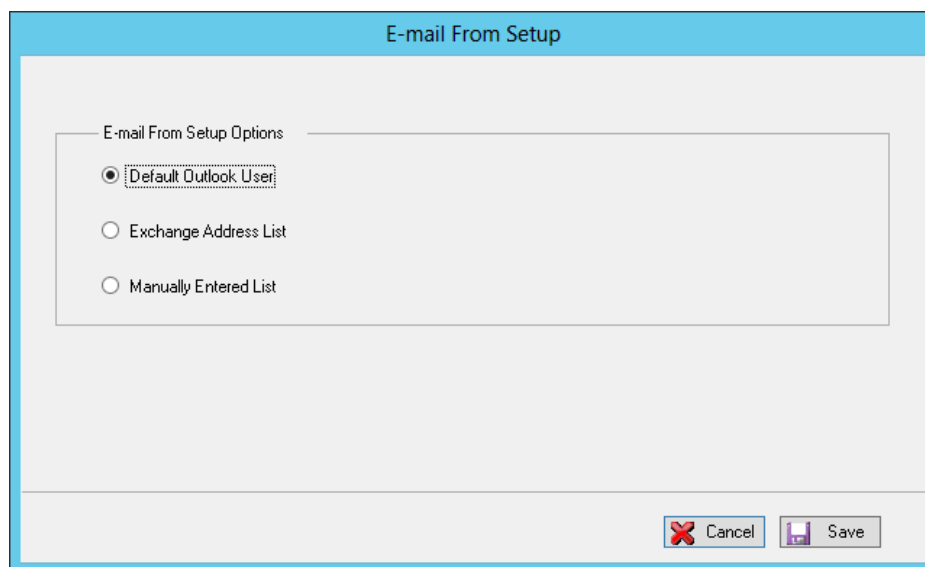
From the Forms Printer Setup window or the Forms Printer Plus Setup window, the E-mail Setup menu option opens the **E-mail From Setup** window. Use this window to determine the list of "From" addresses available in the Email From dropdown list during setup.

Note: This step is only necessary if you plan to use Forms Printer to deliver forms and reports by E-Mail.

Window Navigation

To open the **E-mail From Setup** window, you must first Open the **Forms Printer Setup** window or the **Forms Printer Plus Setup** window using the menu navigation: Microsoft Dynamics GP > Tools > Setup > Company > Forms Printer. Or Microsoft Dynamics GP > Tools > Setup > Company > Forms Printer Plus.

This screenshot shows the **E-mail From Setup** window.



Email “From” Setup Options

On the window, select the “From” choice for the source of your Email From List. The options are:

Default Outlook User

With this option selected, the Email From dropdown list will display “Default Outlook User” as the only choice and all Emails will be sent from the current user’s Outlook Profile, if set up.

Exchange Address List

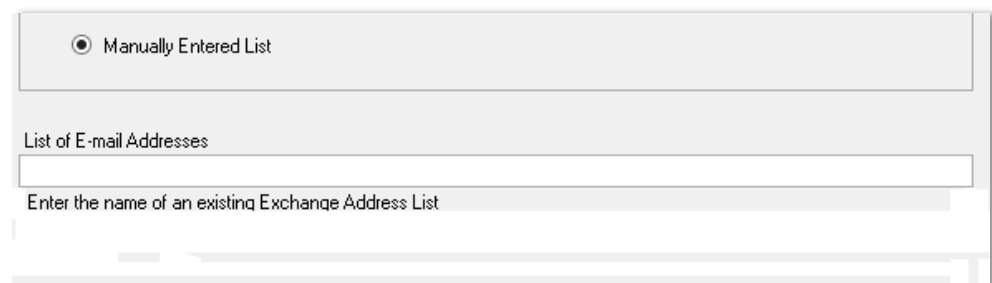
With this option selected, the Exchange Address List text box will be displayed. There you can enter an existing Address List from Exchange, such as the ‘Global Address List’ as shown below:



The screenshot shows a window with two radio button options. The first option, "Exchange Address List", is selected with a filled circle. The second option, "Manually Entered List", is unselected with an empty circle. Below the options is a text box labeled "Exchange Address List". Underneath the text box is a smaller, lighter-colored box containing the placeholder text "Type in a comma separated list of the E-mail address".

Manually Entered List

With this option selected, the List of E-Mail Addresses text box will be displayed. There you can enter a comma separated list of literal Email Address values which will be displayed as the ‘From’ Email choices during Email Delivery Setup. An example list is shown below:



The screenshot shows a window with two radio button options. The second option, "Manually Entered List", is selected with a filled circle. Below the options is a text box labeled "List of E-mail Addresses". Underneath the text box is a smaller, lighter-colored box containing the placeholder text "Enter the name of an existing Exchange Address List".

Window Buttons

The buttons on the Window include:

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

Window Fields

Fields	Description
Forms Printer Email "From" Choices	Radio Group displaying radio button options
Default Outlook User Radio Button	Always use the current Outlook profile as the Email From address.
Exchange Address List Radio Button	Retrieve a list of Email Addresses using an existing Address List in Exchange.
Exchange Address List Textbox	This field is displayed when the Exchange Address List radio button is selected. Here you would enter the name of the address list from which you will select your From addresses.
List Of E-Mail Addresses, comma separated Radio Button	Use a manually entered list of Email Addresses as the From List.
List Of E-Mail Addresses Textbox	This field is displayed when the List Of E-Mail Addresses radio button is selected. Here you would enter a comma separated list of literal Email values from which you will select your From addresses.

Forms Printer Base and Project Setup

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 Base System and / or Forms Printer Plus.

Getting Started with Base System and Project

Once the installation of Forms Printer is complete, the next step is to decide which Dynamics GP reports you want to replace with a Crystal or SSRS report printed by Forms Printer Base System or Project. Following the steps in this guide you will define the report and all of the options to control the delivery of the report to file, printer and Email.

Setting Up Base System and Project

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.

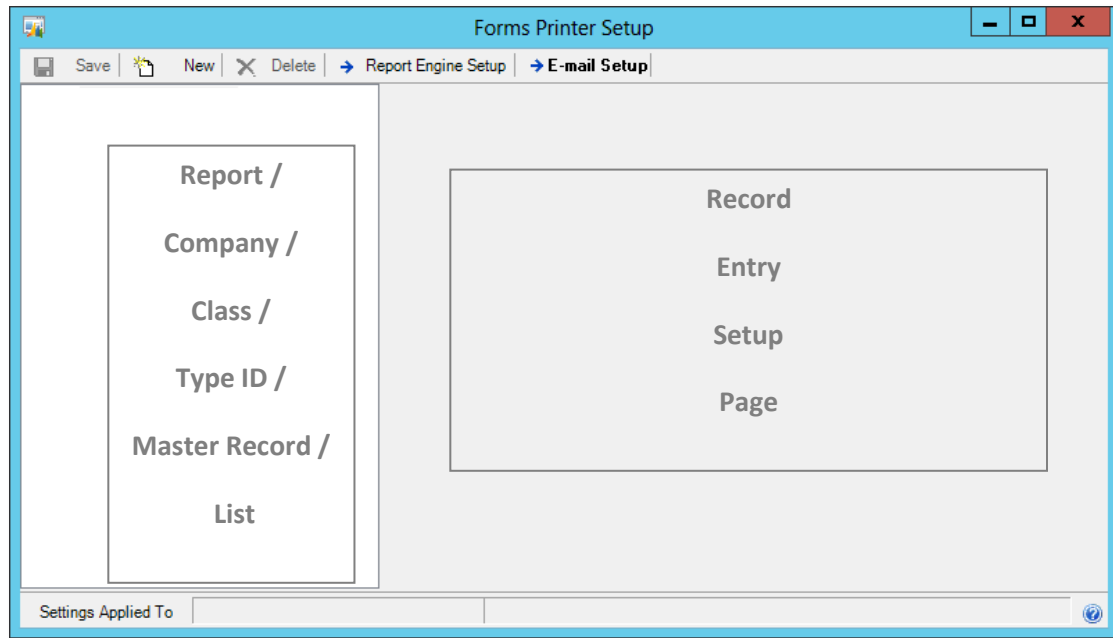
Window Fields

Fields	Description
Report / Company / SOP Document Type ID / Class ID / Master Record List	This treeview list is used to display and modify the list of reports, Companies, SOP Document Type ID, 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 / SOP Document Type ID / Class ID / Master Record List

The list of reports, Companies, SOP Document Type IDs, 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.

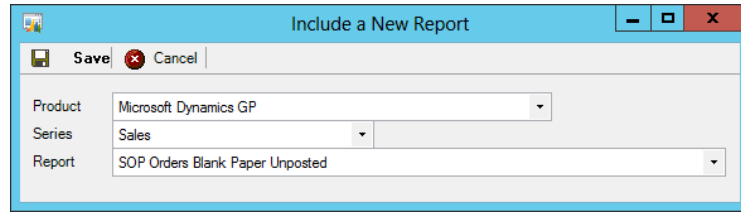
Once you've added a report for printing with Forms Printer, you can then add one or more Companies beneath the report entry if different settings per company are desired.

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

Adding a New Report Setup

Adding Reports

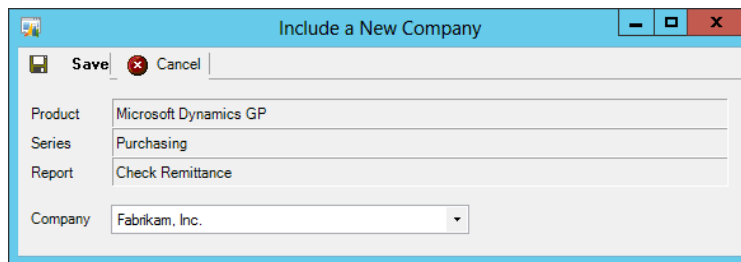
1. Click the **New** button from the control area.
2. Select **Include New Report** from the dropdown menu.
3. From the Include New Report window, select a **Product**.
4. The Product is the Dynamics GP module or 3rd party containing the report to be added.
5. Select the **Series**.
6. The Series is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



Add a Company

NOTE: Only Add Companies if you want DIFFERENT settings between companies, SOP Document Type IDs, Class IDs or Master Records. If all Companies, SOP Document Type IDs, 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**.
6. 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.

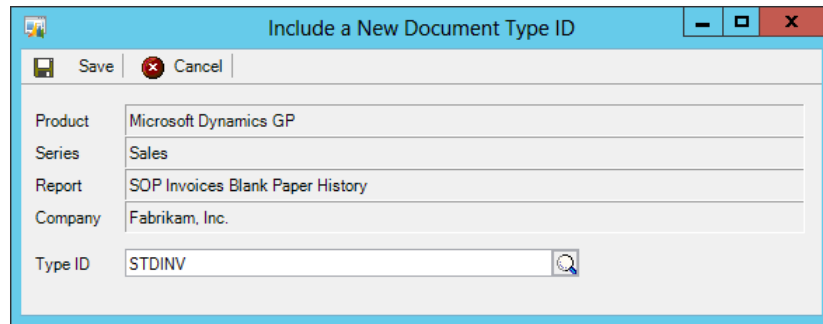


Add a SOP Document Type ID Record

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

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

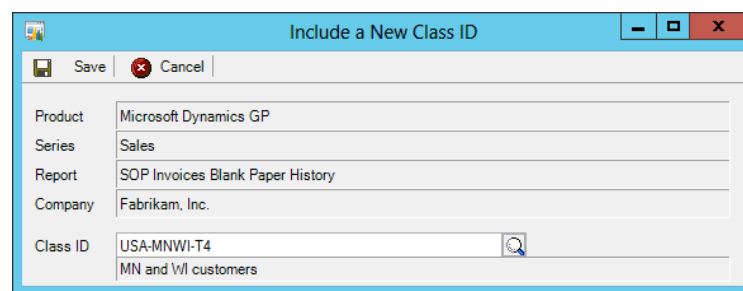
7. This screenshot of the Include a New Document Type ID window shows the selected report and Company to which the Type ID is being added.



Add a Class ID Record

NOTE: Only Add 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 SOP Document Type ID and/or Class ID and a customer in that Class ID defined in Setup, the Customer's settings will take precedence over the Class and the SOP Document Type ID.

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



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 SOP Document Type ID and/or Class ID and a customer in that Class ID defined in Setup, the Customer's settings will take precedence over the Class and the Type ID.

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 Master Record for Selected Report and Company** from the menu.
4. From the Include a New Master ID window, select a **Master ID** by clicking on the Master ID Lookup.
5. This will open a lookup window where you can select a Master ID and return it to the Include a New Master ID window.
6. Click **Save**.
7. 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 / SOP Document Type ID / Class ID / 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 / SOP Document Type ID / Class ID / 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 E-mail".

Window Fields and Controls

Fields	Description
Report Tool See the Report Tool Details section below for important information on Report Tool behavior.	This dropdown list is used to select the Reporting engine desired for the selected Report or Company. Note that when choosing Report Writer, Forms Printer will direct the report to the specified printer. If you do not want Forms Printer to control the printing, delete the report from Setup. Choosing Report Writer enables ONLY the "To Printer" delivery.
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 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. See the Report Export Formats section for details.
Save Folder	Determines the directory in which Forms Printer will create the exported file. This folder can be determined in one of two ways: Using the Export File Name feature. For details on that functionality click the link to see the description below. 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: <i>Document Type Document Number System Date System Time.extension</i> 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: <i>Document Type First Document Number to Last Document Number System Date System Time.extension</i> 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: <i>Document Type Customer Number System Date System Time.extension</i>

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

See the [To Printer Details](#) section below for important information on To Print behavior.

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.

To Printer Selection

This selection 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.

Specific Printer

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.

Printer	This read only field displays the printer selected when Specific Printer is used.
---------	---

Print Setup Button	This button opens the Print window where a printer and its properties can be chosen.
--------------------	--

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 Crystal 9 runtime, or displays a complete printer selection dialog with the Currently installed Crystal XI-R2 Runtime.

To E-mail	Selecting the 'To E-mail' checkbox, allows delivery of the selected document by E-mail.
Using 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 SSRS as the Reporting Engine only Use Outlook is enabled.
Using 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: You cannot specify an 'Email From' profile. The default profile will be used as the 'From' address. You cannot name the attachment. The attachment name will be the same as the Crystal Report used to create it. You cannot specify the Send Option. The Email will be sent automatically to the recipient.
E-mail From	The 'Email 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 E-mail' feature of the Forms Printer Delivery System, the client workstation must have a Messaging Application Programming Interface (MAPI) compliant Email 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 Emailing functionality, it is recommended to use Microsoft Outlook 2000 or Greater.

E-mail To Source

The ‘Email To’ dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the Email To Address.

Internet Information User Defined E-mail Field

This selection is the legacy setting from Forms Printer and uses the Internet Information window’s “E-mail” field value. This E-mail address is stored per Master Record, per Address, in the **original Internet Information E-mail** field of 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

Internet Information E-mail Addresses (To, CC and BCC)

This selection uses the newer E-mail To, CC and BCC fields from the Internet Addresses window. This E-mail address is stored per Master Record, per Address. The Master record is either the Customer or Vendor for which the document was created, depending on the document type being printed

Dynamics GP Setup

This selection uses the options for E-mail source from the Dynamics GP E-mail setup. For more information on that setup, see the Dynamics GP help.

E-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. Used in conjunction with the E-mail To Source selection, the E-mail To list either shows the available options, or if using the “Dynamics GP Setup” option, is disabled.

Alternatively, the option Scripted Mail To List can be selected allowing the results of the Scripted Mail To Addresses list to control the Email To address for the selected entry.

Additional E-mail To Addresses

The Additional E-mail To Addresses link opens the Additional E-mail Addresses Setup window. This window allows you to define addresses to mail to, other than the primary address selected in the ‘Email To’ dropdown list.

	The link will be displayed in red when additional E-mail addresses have been added.
Scripted E-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. The link will be displayed in red when a script has been entered.
Replies Sent To	This text field allows for the entry of an E-mail address that will receive the E-mail if the recipient replies to the E-mail. NOTE that for the Reply To functionality to work properly, the Email must be sent to an Email address outside of the Exchange domain sending the Email.
Send Option	The Send Option dropdown list allows you to select the destination for the created Email. The selections for Send Options are described below. <i>Send Directly to Email Recipient:</i> Automatically sends the Email. <i>Save To Outlook Drafts folder:</i> Creates the Email in the Drafts folder. Email must be sent manually. <i>Save to Outlook Outbox:</i> Creates the Email and saves it to the Outbox. Email must be sent manually. <i>Save to Outlook Outbox Delayed:</i> Creates the Email and saves it to the Outbox. Email will be sent automatically at the specified time selected by the Hours to Delay option. <i>Display created Email:</i> Creates the Email displays the Email rather than sending or saving it. Once any required modifications are made, the Email 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 Email's delayed send property. For example, if the Email 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 Email would be created in the Outbox, and would stay there until 10:15 PM, and then it would be Emailed to the selected Recipients.

If No Email Address	This dropdown allows you to define the default behavior to follow when the Master Record does not have a defined Email address in the field(s) defined by the Email To setup. The choices are either to generate the Email and save the created Email without an Email Mil To address in the Outlook Drafts Folder or to print the Document.
Printer	The Printer selection is used when the If No Email Address selection is set to Specific Printer.
Multiple Documents per E-mail	When printing a batch or range of SOP, POP, or RM 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. This feature is NOT available for Project Accounting Invoices.
Additional Attachments	The Additional Attachments Link opens the Include Additional Attachments window where files, including those attached in the GP Attachments Setup, can be chosen as attachments to the Email in addition to the Dynamics GP transaction. The link will be displayed in red when attachments have been added. Click for help with using the Additional Attachments window.
Attachment Format	The Attachment Format dropdown list allows you to specify the format for the Email attachment.
Attachment Name	The Attachment Name allows you to enter the text, as it will appear in the Email 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.
Message & Subject	The Message & Subject radio group allows for the selection of source used to setup the E-mail Subject and E-mail message body. The choices are: From Forms Printer This selection allows for the selection and setup of the E-mail message and Subject using the options from the Forms Printer Setup window.

From Dynamics GP

This selection disables the Message ID and Subject fields and allows instead, the selection of message and Subject as defined and setup within the standard Dynamics GP windows.

Message ID

This field displays the Message ID to be used when Emailing the selected document type. *For more information, see the Message Editor section of this document.*

Message Description

This field displays the Message Description.

Subject

Email Subject sets the text, as it will appear in the Email 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.*

Report Tool Details

Once a report is added to Forms Printer Setup, the Report Tool dropdown allows the user to choose between Report Writer, Crystal Reports and SQL Reporting Services. There are some specific behaviors that it is important to understand when selecting the Report Writer Report Tool.

When the Report Tool is Report Writer . . .

1. ... Forms Printer's 'To File' and 'To E-mail' functionality is disabled. Only Crystal Reports and SSRS reports can be E-mailed or sent to file by Forms Printer.
2. ... the Report setup can be saved with no Delivery Options selected and the Printer Selection will be cleared when 'To Printer' is unchecked.
3. ... and no Delivery option is selected, Forms Printer will not attempt to control the report for the selected Report Level.
4. ... and the 'To Printer' Delivery option is checked, Forms Printer will send the printing of that Report to Report Writer, and you will not be able to use the Word Template option for that report.
5. ... You can still define other levels beneath the report and select Crystal or SSRS as the Report Tool so that Forms Printer can be used for 'To File' and 'To E-mail' delivery.

To Printer Details

When a report is added to Forms Printer and the Report Tool is set to Crystal or SQL Reporting Services, the 'To Printer', Printer Selection Dropdown and Printer name fields have specific control of the report when printing to printer that is important to understand. Some things to note about the 'To Printer' settings are:

1. If the 'To Printer' checkbox is checked, and the user chooses to Deliver, Forms Printer will always send the report using the option selected.
2. If the 'To Printer' checkbox is not selected the Printer Selection value chosen is still used as the default printer when selecting Print from the Print or Deliver Dialog of Forms Printer.

1. Window Example

Below is a screenshot example of the Forms Printer Setup window showing SOP Document Type ID, Customer and Class ID entries in the Report / Company / SOP Document Type ID / Class ID / Master Record list and Record Entry Setup Page.

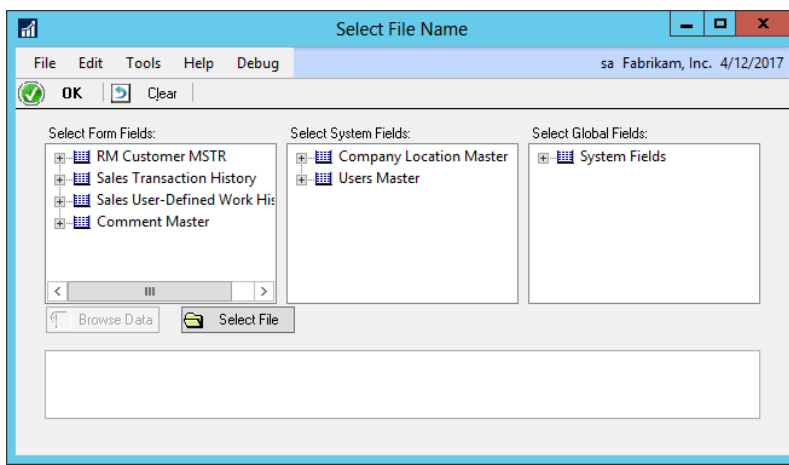
The screenshot shows the 'Forms Printer Setup' window with the following configuration:

- Report Tool:** Crystal Reports
- Report Path:** C:\Program Files (x86)\Microsoft Dynamics\GP2016\Forms Printer\Crystal
- Deliver This Report Using The Options:**
 - ☐ To File
 - ☐ To Printer (Default System Printer, Copies To Print: 1)
 - ☒ To E-mail
 - ☒ Using Outlook (Selected)
 - ☐ Using Crystal MAPI
- E-mail Settings:**
 - E-mail From:** Default Outlook User
 - E-mail To Source:** Internet Information User Defined E-mail Field
 - E-mail To:** Document Bill To
 - Replies Sent To:** sales@accountable.com
 - Send Option:** Send Directly
 - If No Email Address:** Save to Drafts Folder
 - Hours To Delay:** 0
- Attachments:**
 - ☒ Multiple Document Attachments Per E-mail
 - Attachment Format:** Adobe PDF
 - Attachment Name:** invoice
- Message & Subject:**
 - ☒ From Forms Printer (Selected)
 - ☐ From Dynamics GP
 - Message ID:** INVOICE
 - Message Description:** Invoice
 - Subject:** Your Invoice {<RF>'SOP Number' of table SOP_HDR_HIST,0}

The left pane shows a tree view of the Microsoft Dynamics GP structure, with the 'SOP Document Type ID' folder selected under 'Sales'.

Select File Name

The Select 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:

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

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.

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

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 Select File Name window but that actual file format will be that of the File Format dropdown selection.

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

Report Export Formats

When using Forms Printer to export reports to file or Email reports as an attachment, you must select the file type for the exported file or attachment. The file type options vary depending upon whether Crystal Reports or SQL Server Reporting Services is used to generate the report. Below is a list of the formats available for each tool.

Crystal Reports File Formats	SQL Server Reporting Services Rendering Extensions
Adobe PDF	Adobe PDF
Microsoft Office Excel Worksheet	XML Document
HTML Document	Image
Microsoft Office Word Document	HMTL 4.0 Document
Rich Text Format	HTML 3.2 Document
Crystal Report	MHTML Document
Comma Separated Text File	Microsoft Office Excel Worksheet
Tab Delimited Text File	Comma Separated Text File
Text Document	Microsoft Office Word Document

For details regarding these extensions, see the documentation provided for Crystal Reports or SSRS.

Additional Email 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 'Email To' dropdown list. The screenshot below shows this window.

Mail Address Type	Required	Use E Mail Address Of
Mail To Address	☒	Document Bill To
CC Address	☒	Document Ship To
BCC Address	☒	Document Salesperson

Manually Add Additional Addresses

E Mail To List: sales@accountable.com

E Mail CC List:

E Mail BCC List:

Mail Address Type

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

Required

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

Use Email Address Of

The 'Email Address Of' dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the additional Email Address. This Email 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.

Email CC List

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

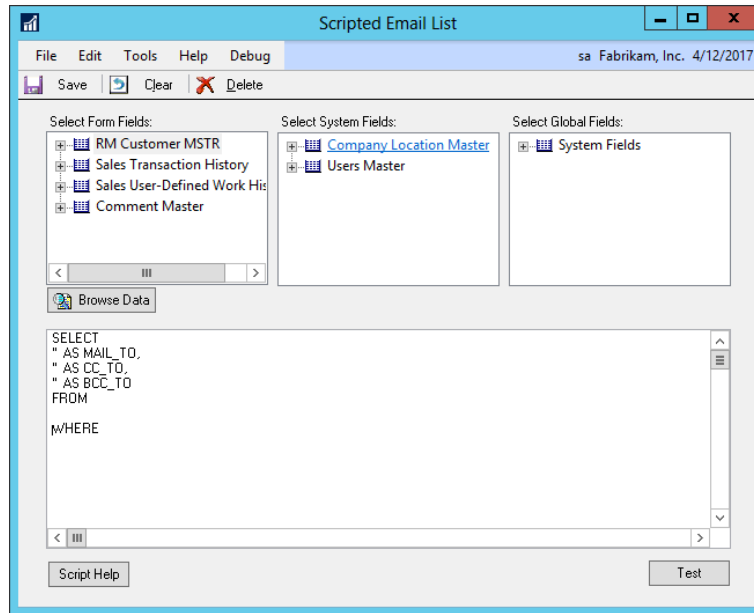
Email BCC List

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

Note: Email 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 Email 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

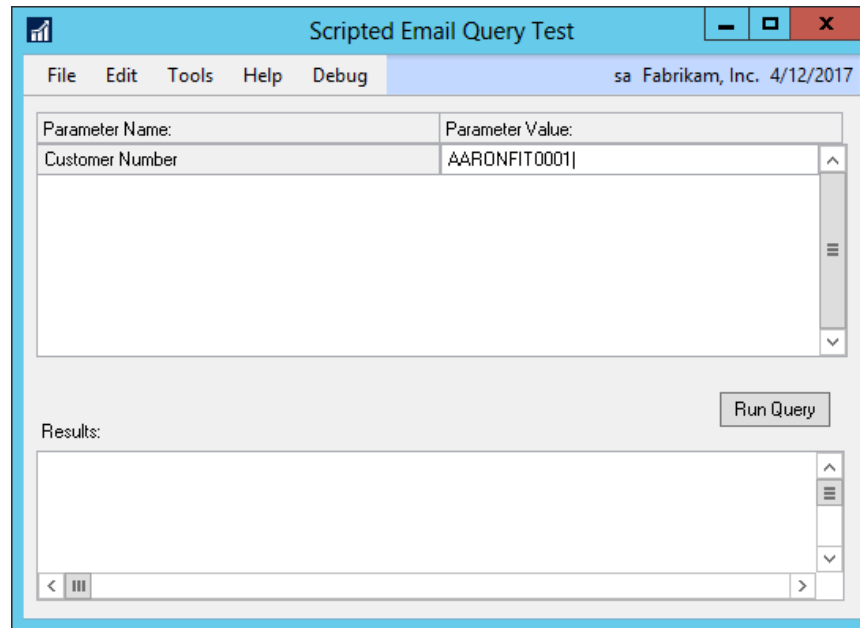
The Script Help button opens the Scripted Email Help window which displays a basic explanation on the use of the Scripted Email feature.

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 Email 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

The Scripted Email Lists can return **1 or more** email addresses for the Email 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 RESPONSIBLE FOR ENSURING THE PROPER SCRIPT AND SELECTION CRITERIA HAVE BEEN ENTERED. THE WRONG SCRIPT CAN SEND EMAILS TO INDIVIDUALS YOU DID NOT INTEND.

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 Email 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 Email To and BCC but not the CC we would enter

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

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
```

The Scripted lists can be used exclusively or in conjunction with the Email 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 Email **To** dropdown list on the **Forms Printer Setup** window and leave the **Additional Mail to Addresses** blank.

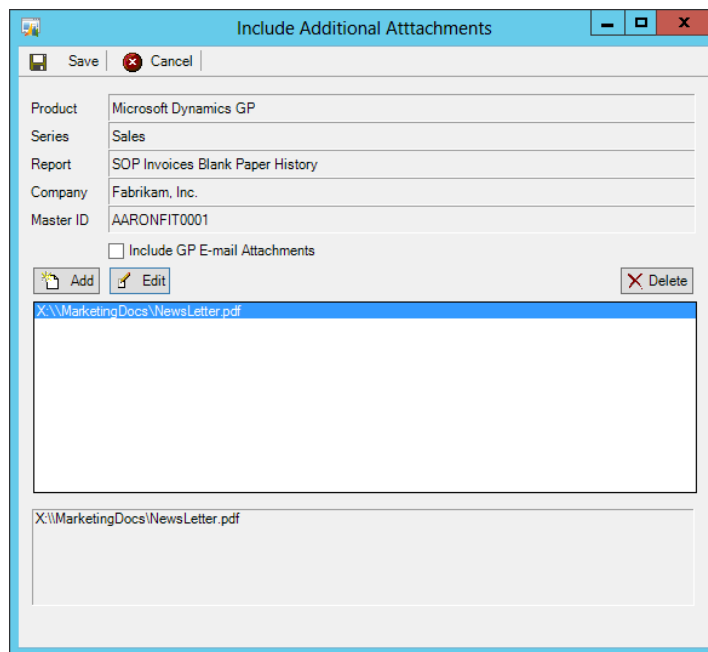
Additional Attachments

The Additional Attachments window allows files to be selected for attachment to the Email when a Dynamics GP document is being delivered To Mail. These files can be selected by name or they can be included using hardcoded text and parameter fields from specific tables, system tables, and global fields. When the Email is created Forms Printer will fill in any parameters using data associated with the document being Emailed, retrieve the file from the file system and attach it to the email along with the Dynamic GP document before completing the defined delivery.

Note: If the defined document(s) does not exist at the time the email is generated, Forms Printer WILL STILL CONTINUE WITH DELIVERY. Failure to retrieve a defined file DOES NOT STOP the Email. To stop the email and display an error, set the Dex.ini entry ASIFP_ERRORONMISSINGATTACHMENT = TRUE.

The screenshot below shows an example of a list of files to be added as attachments to the delivered Email.

Include Additional Attachments



Include GP E-mail Attachments

This checkbox instructs Forms Printer to examine the GP Attachment setup for attachments rolled down or added to Sales and Purchasing transactions, and are marked to be included in E-mails in the **Select Attachments to Send in Email** window. See the Dynamics GP Attachments documentation for more on how the GP attachment functionality is setup and used.

Add

The **Add** button opens the Attachment Path and File Name window where files can be selected and paths containing report fields can be built.

Edit

The **Edit** button opens the Attachment Path and File Name window, displaying the file and path highlighted on the Include Additional Attachments window. From there you can make changes to the file name and path by making manual changes or by selecting a new file.

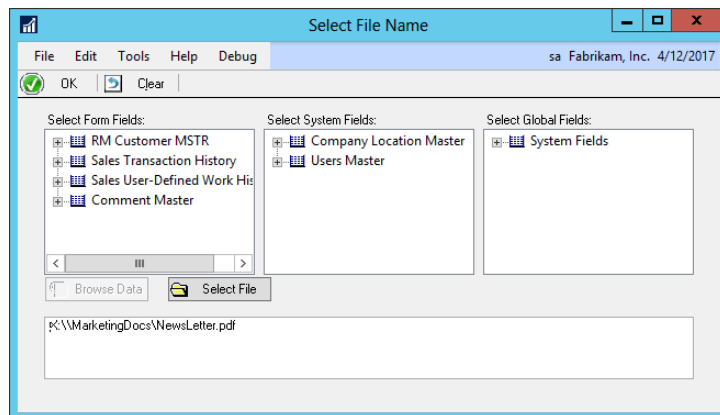
Delete

The Delete button removes the highlighted file from the list of attached documents.

Select File Name

The Select File Name window allows you to type in, select or build a path and file name for the file(s) to be attached. When building the path or name using parameter fields, any part of the file name or path can be replaced with the parameter.

The screenshot below shows an example of the Select File Name window.



Select File

The Select File button opens the Select a File window where you can browse local files, network folder and UNC paths to find and select a file to be added as an attachment to your Email.

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 file path and / or name.

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 file path and / or name.

Select Global Fields

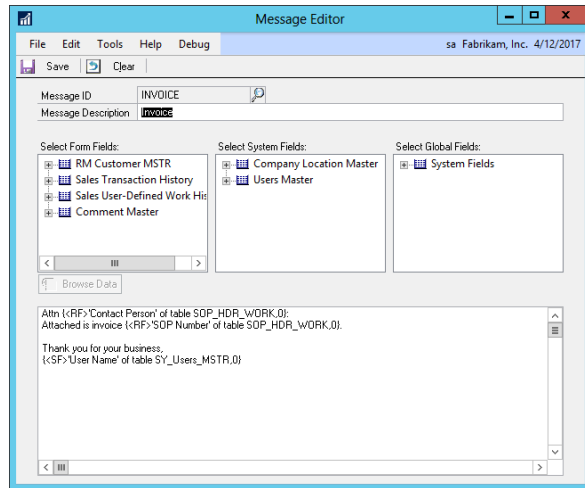
The Select Global Fields List displays global fields available to be used as parameters for the selected document type. Double clicking on a field adds that field to the file path and / or name.

Note: Parameters appear in the Path and File Name 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 path will be replaced with the actual value of the fields when the Email is created. These parameters should not be altered in any way.

Message Editor

The Message Editor Window is used to create the Email 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 emailed.

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 Email 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

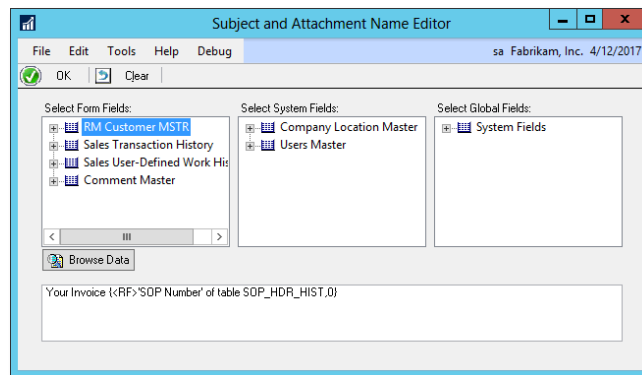
The Browse Data button displays a list of the first 5 unique values in the selected Form Table column. This is provided as an easy way to determine the contents of a given field.

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 emailing 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 Email 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 emailed.

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

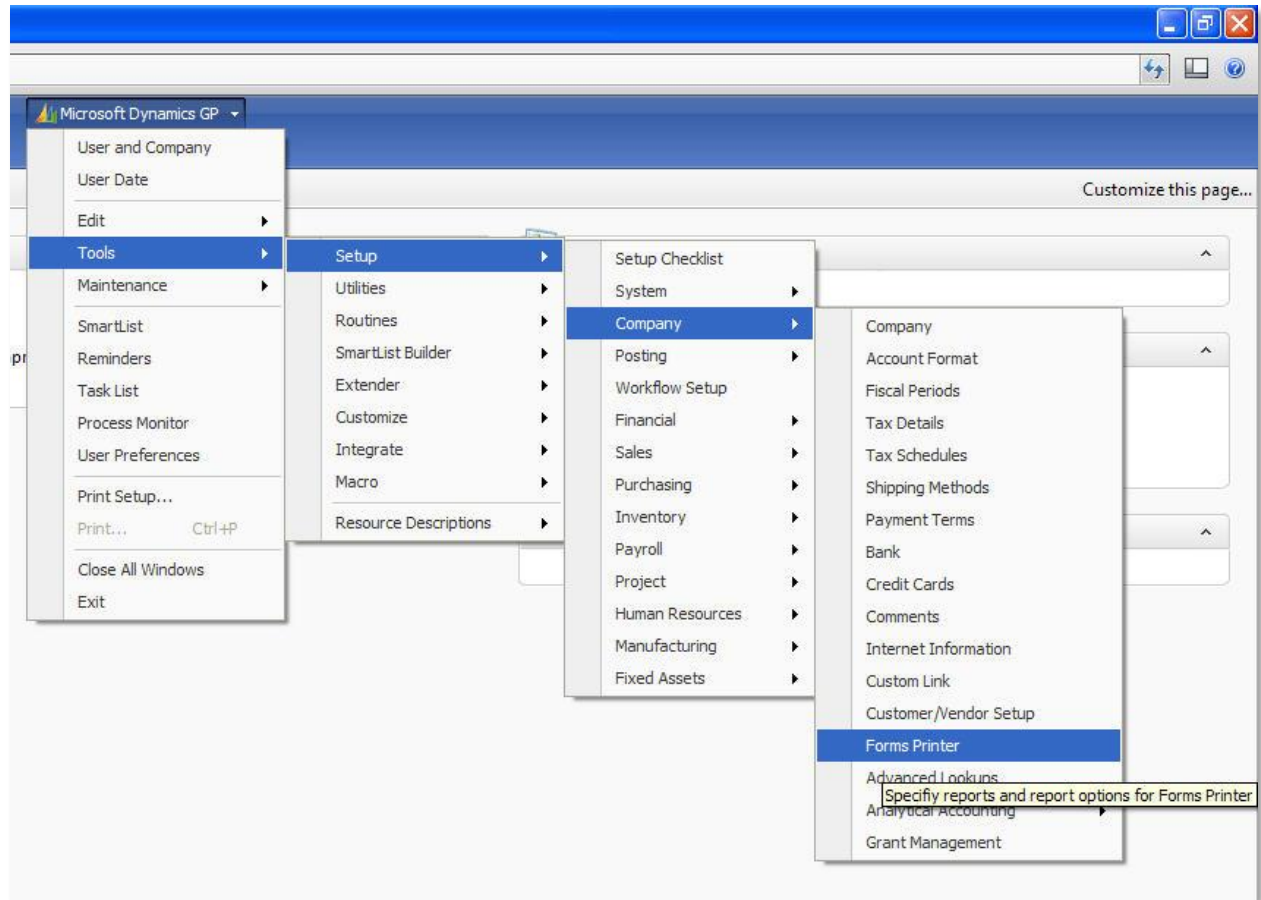


Window Navigation

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 with Base System and Project

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.

Forms Printer Plus Setup

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 add Forms Printer Plus reports.

Note: Crystal Reports added through Forms Printer Plus follow the same “generic” data connection rules as those used in Forms Printer Base. See the [Crystal Report Setup](#) section for details.

Getting Started with Forms Printer Plus

After following the installation steps for Forms Printer Plus, the next step is to begin deciding on which window in Dynamics GP you would like to run a report, choosing how the report should be launched, selecting the report to be run, mapping fields from the window to the report, and deciding on delivery to file, printer and Email.

To begin this process, launch the Forms Printer Plus Setup Wizard by clicking on the **New** button on the Forms Printer Plus Setup window.

Once you have created a report setup, it will appear in the Forms Printer Plus Setup treeview and you will be able to edit its various options directly in each tab of Forms Printer Plus Setup. For details on the Forms Printer Plus Setup window tabs, see the section below detailing the Forms Printer Plus Setup Wizard.

Setting Up Forms Printer Plus

The Forms Printer Plus Setup window is used to view and modify previously defined report setups as well as to launch the Forms Printer Plus Setup Wizard where new reports can be defined.

To access the setup information, use the Menu item:

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

or add the Forms Printer Plus Setup window to your work button or Shortcut Bar.

Window Buttons

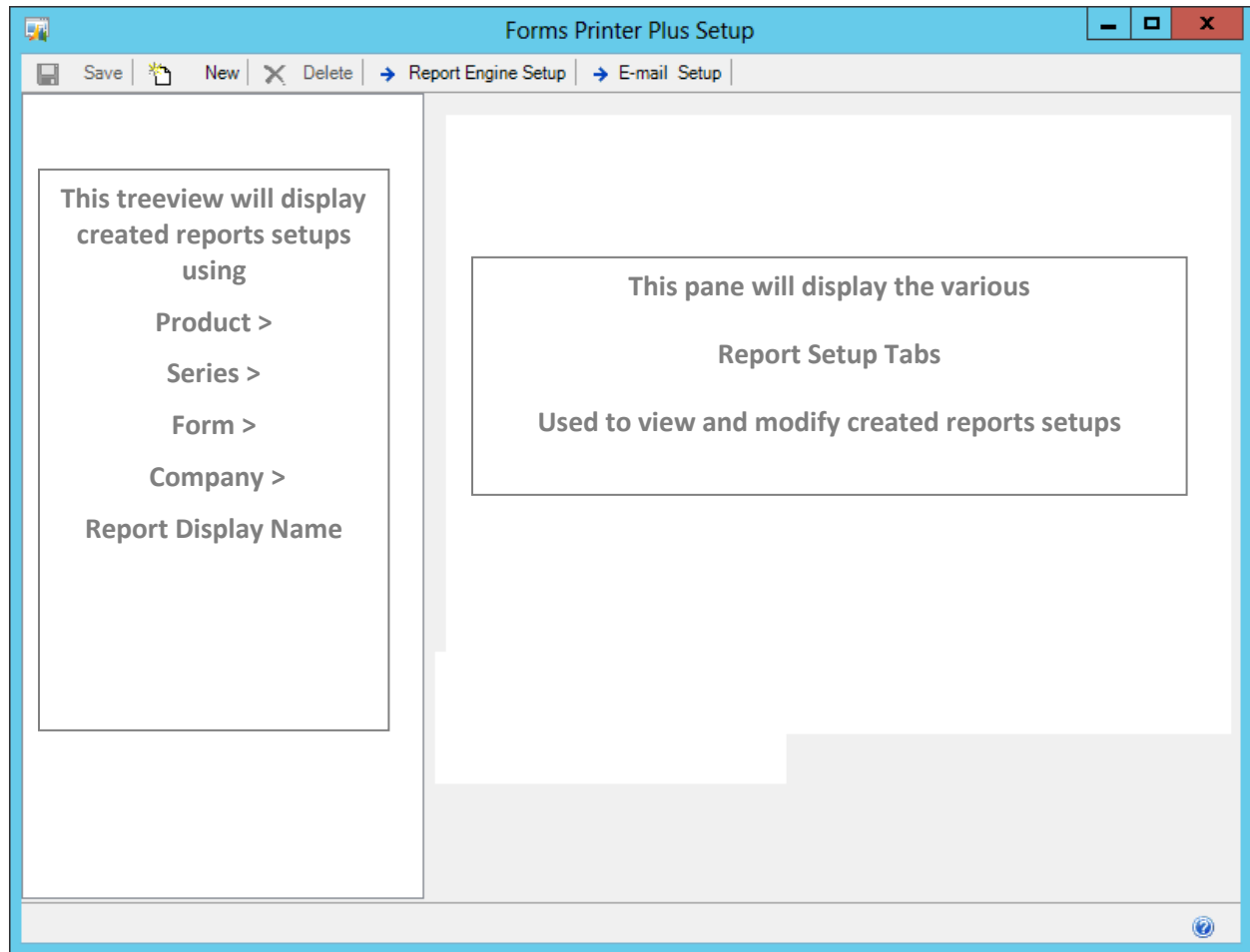
Buttons	Description
Save	Saves any changes made to window values.
New	This button opens the Forms Printer Plus Setup Wizard where a new report setup can be defined.
Delete	Deletes the currently selected report from the tree view.
Report Engine Setup	Displays the Report Engine Setup menu options for setup of the available reporting tools. Note that this window is shared with Forms Printer and Plus. If using both products, setup only needs to be done once.

Window Fields

Fields	Description
Tree view	This treeview list is used to display and modify the list of reports that are setup in Forms Printer Plus. The tree view lists defined reports using the hierarchy of Product, Series, Form, Company, and Report display name.
Record Entry Setup Page	This editable page shows the tabs used to modify the various settings for the record selected in the treeview.

Window Example

This screenshot shows the Forms Printer Plus Setup window as it will appear before adding report records.



Forms Printer Plus Setup Wizard

The Forms Printer Plus Wizard is used to create new report setups. After launching the wizard from Forms Printer Plus Setup, you will navigate through each tab, defining the required information on that tab. Once complete, click the Next button to be taken to the next tab in the sequence.

Each tab includes a brief explanation of the tab's functionality as well as the same set of basic navigation buttons defined below.

Wizard Buttons

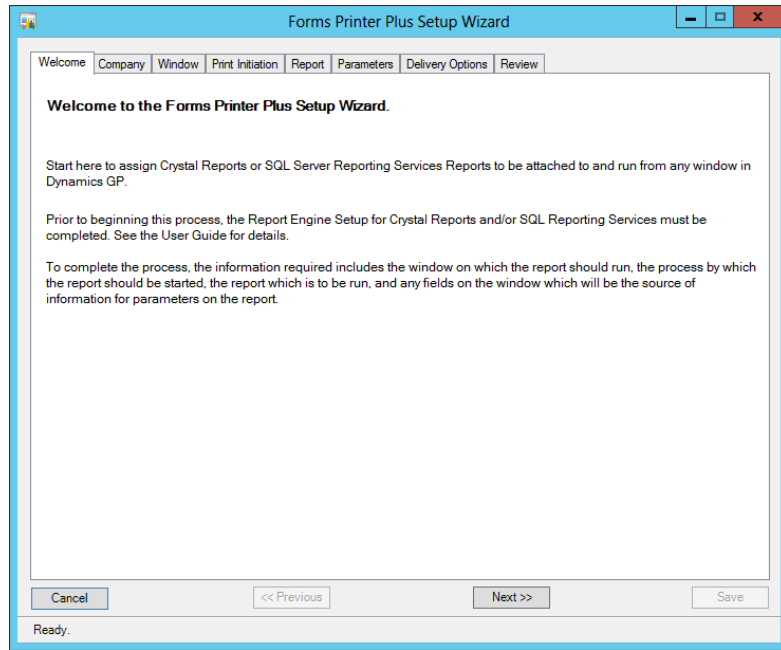
Button	Description
Cancel	Closes the Setup wizard without saving the report setup.
Previous	Navigates back one tab in the setup process.
Next	Navigates to the next tab in the setup process.
Save	After entering all required setup information, this button closes the wizard and creates the new report setup, displayed in the Forms Printer Plus Setup window.

Wizard Tabs

Welcome Tab

The Welcome tab displays a brief description of the steps that will be performed in the Setup Wizard.

Window Example - Welcome



Company Tab

The Company tab is used to define in which company(s) the defined report should be run.

Tab Buttons

Button	Description
Companies	This radio group is used to determine whether the report setup will be available in All Companies or within a Specific Company . By default, the setup will be available in all companies. To define the setup for an individual company, mark the Specific Company radio option then use the Specific Company list to choose the company in which the setup will be available.

Tab Fields

Field	Description
Select Company	This list box, enabled when the Specific Company radio button is selected, displays the available companies within Dynamics GP. If the report setup being created is intended to be available in a single company, use this list to choose the company in which the report will be available.

Window Example - Company

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Company Selection' tab. The window has a title bar with standard Windows controls and a tabbed interface with tabs for 'Welcome', 'Company', 'Window', 'Print Initiation', 'Report', 'Parameters', 'Delivery Options', and 'Review'. The 'Company' tab is active. The main content area is titled 'Company Selection' and contains the following text: 'Define which companies should run the report.' and 'Additional company and report combinations can be defined by going back through the wizard setup.' Below this text is a section labeled 'Companies' containing two radio buttons: 'All Companies' (unselected) and 'Specific Company' (selected). Under the 'Specific Company' radio button is a list box labeled 'Specific Company' which contains two entries: 'Fabrikam, Inc.' (highlighted) and 'Three Company 2016'. At the bottom of the window are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'. A status bar at the very bottom indicates 'Ready.'

Note: Once a report setup is created and saved using the “All Companies” selection, you will NOT be able to define a report setup using the Specific Company selection using the same Window and Button as a setup using the ‘All Companies’ selection. You can define multiple reports for the same window using the Additional menu or other buttons.

Window Tab

The Window tab is used to select the window to which the Forms Printer Plus report should be attached.

Tab Buttons

Button	Description
Help Me Choose	This button puts the wizard into a “Picker” mode that assists the user in selecting the window on which the report will be available. See the Help Me Choose Window Picker for details.
Window Lookup	This button opens the Window Lookup window allowing the user to manually select the window on which the report will be available. See the Window Lookup Window for details.

Tab Fields

Field	Description
Product	This display only text fields shows the product in which the window returned by either the Help Me Choose process or the Window Lookup exists.
Series	This display only text fields shows the series of the window returned by either the Help Me Choose process or the Window Lookup.
Form	This display only text fields shows the Form of the window returned by either the Help Me Choose process or the Window Lookup.
Window	This display only text fields shows the window returned by either the Help Me Choose process or the Window Lookup.

Window Example – Forms Printer Plus Setup Wizard Window

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Window Selection' tab. The window has a title bar with standard Windows controls and a tabbed interface with tabs for 'Welcome', 'Company', 'Window', 'Print Initiation', 'Report', 'Parameters', 'Delivery Options', and 'Review'. The 'Window' tab is active, displaying the 'Window Selection' section. Below the title, there is a brief instruction: 'Define which Window the report should run from. Selecting the window includes choosing the product and form in which the window exists.' The main area contains four text input fields: 'Product' (with 'Microsoft Dynamics GP' entered), 'Series' (with 'Financial' entered), 'Form' (with 'GL_Inquiry_Current_Summary' entered), and 'Window' (with 'Summary Inquiry' entered). To the right of these fields are two buttons: 'Help Me Choose' and 'Window Lookup'. Below the 'Window Lookup' button is a small text box explaining its function: 'To select the Product, Series, Form and Window from lists, click Window Lookup.' At the bottom of the window are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'. The status bar at the very bottom indicates 'Ready.'

Window Lookup Window

The Window Lookup window, aside from having an awkward name, is used to select the window on which a Forms Printer Plus report will be available. The selection of the window is made manually on this window by choosing the source product, series, and form.

Note: If unsure of the Product, Series, Form or window, the Help Me Choose option provides a 'point and click' selector that will identify these elements automatically.

Tab Buttons

Button	Description
Select	This button closes the Window Lookup window and returns the selected information to the wizard.
Cancel	This button closes the Window Lookup window without returning information to the wizard.

Tab Fields

Field	Description
Product	This dropdown list displays a list of products included in the current Dynamics GP system. Use it to select the product in which the intended window exists.
Series	Once the Product is selected, this dropdown lists the series that exist in that product. Use it to select the series in which the intended.
Forms	Once the Series is chosen, this list shows the available forms within the selected series and product. Use it to select the form on which the intended window exists.
Window	Once the Form is selected, this list displays the windows available on the selected form. Use it to choose the window on which the report should be available.

Window Example - Window Lookup window.

The screenshot shows the 'Window Lookup' window with the following details:

- Product:** Microsoft Dynamics GP
- Series:** Financial
- Forms:** A list of forms including GL_Account_Entry, GL_Account_Maintenance, GL_Account_Segment_Restrictions, GL_Account_Summary, GL_Account_Summary_History, GL_Batch_Entry, GL_Budget_Journal_Hist_Lookup, and GL_Budget_Journal_Lookup. The 'GL_Account_Summary' form is selected.
- Windows:** A list of windows including GL_Account_Summary, which is selected.
- Buttons:** Select and Cancel buttons at the bottom right.

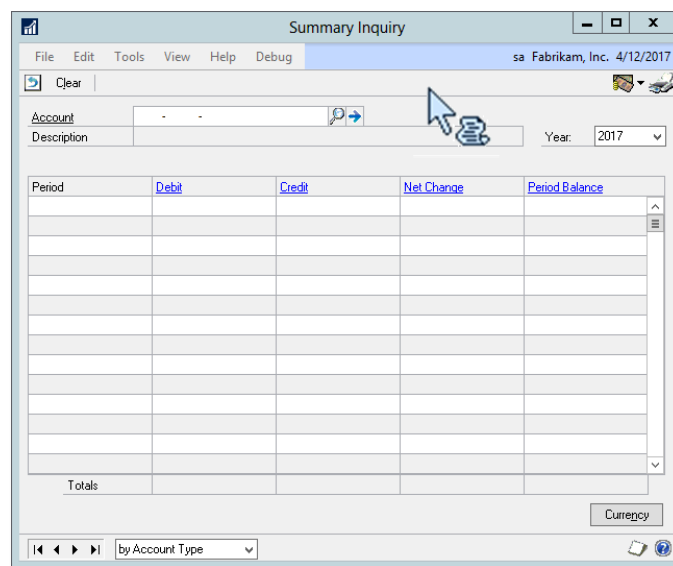
Help Me Choose - Window Picker

The **Help Me Choose** button puts the wizard into a “Picker mode”. When opened from the **Window** tab, this mode is used to click on the window on which the Forms Printer Plus report is to be available. To choose the GP window using the picker, first click on the **Help Me Choose** button from the **Window** tab. Dynamics GP will be brought to the foreground and Picker mode is indicated by a change in the cursor to the image shown below:



While in Picker Mode, navigate Dynamics GP through the normal menu selection or other navigation methods and open the window on which the report is to be attached. Once open, click on the window to select it and return the window information back to the Forms Printer Plus **Window** tab.

Below is an example of a Dynamics GP window about to be selected in Picker mode.



Note: You may find that not all fields on the window are selectable with the Picker. If this is the case, use the Field Lookup window to manually select from a list of available fields.

While in Picker mode, you can cancel and return to the wizard by clicking the Cancel Picker button on the Window tab.

Print Initiation Tab

The Print Initiation tab is used to determine the process by which the report will be run. The choice is made to have the report run from the Additional menu or from a button on the window selected on the **Window** tab.

Tab Buttons

Button	Description
Help Me Choose	This button puts the wizard into a “Picker” mode that assists the user in selecting the button to be used in launching the report. See the Help Me Choose Field Picker for details.
Field Lookup	This button opens the Field Lookup window allowing the user to manually select button to be used in launching the report. See the Field Lookup Window for details.

Tab Fields

Field	Description
Product	This displays the product containing the selected window.
Window	This displays the selected window.
Print From	This radio group determines whether the report will be run from the Additional menu or from a button on the window.
Additional Menu	This radio button option is the default. When selected, the report will be available from the window from the Additional menu on the selected window.
Menu Name	Enabled when the Additional Menu radio button is selected, this field is used to enter text as it should appear on the menu when selecting the report to run.
Window Button	This radio button option is selected when the report is to be run by clicking on a button on the selected window.
Window Button	Displayed and enabled when the Window Button radio button is selected, this field displays the name of the window button chosen by either the Lookup of Picker process.

Note: When set to Window Button for the Print From setting, Forms Printer Plus will run the report defined after the other normal processing defined for the selected button.

Window Example – Print Initiation

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Print Initiation Selection' tab. The window has a title bar with standard Windows controls and a tabbed interface with tabs for Welcome, Company, Window, Print Initiation (selected), Report, Parameters, Delivery Options, and Review. The main content area is titled 'Print Initiation Selection' and contains the following elements:

- Instructions: 'Define the method for launching the report. The report can be launched from the Additional menu, or from a window button.'
- Product field: A text box containing 'Microsoft Dynamics GP'.
- Window field: A text box containing 'Summary Inquiry'.
- Print From section: A group box containing two radio buttons: 'Additional Menu' (selected) and 'Window Button'.
- Menu Name field: A text box containing 'My Custom Summary Report'.
- Help Me Choose button: A button with the text 'Help Me Choose'.
- Field Lookup button: A button with the text 'Field Lookup'.
- Help text: Two paragraphs of instructional text. The first paragraph explains the 'Help Me Choose' button's function. The second paragraph explains the 'Field Lookup' button's function.
- Navigation buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'.
- Status bar: A label 'Ready.'

Field Lookup Window

The Field Lookup window, when opened from the Print Initiation tab is used to select the button from which the Forms Printer Plus report will be run. The selection of the button is made manually on this window by choosing from the list of buttons available on the window chosen on the **Window** tab.

Note: If unsure of the button, the Help Me Choose option provides a 'point and click' selector that will identify the button by clicking on it.

Picker mode can be canceled at any time by returning to the Forms Printer Plus Setup or Wizard and clicking the Cancel Picker button shown in place of the Help Me Choose button.

Window Buttons

Button	Description
Select	This button closes the Field Lookup window and returns the selected information to the wizard.
Cancel	This button closes the Field Lookup window without returning information to the wizard.

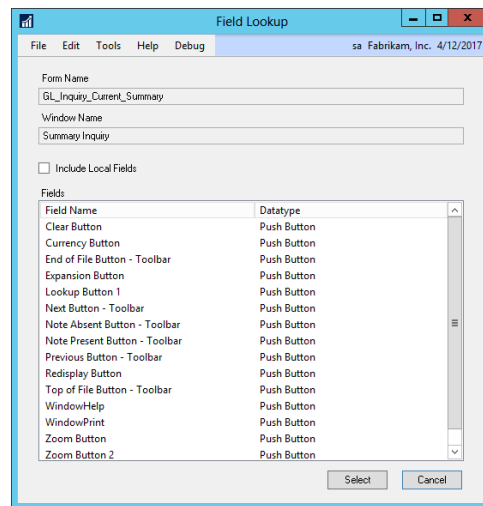
Window Fields

Field	Description
Form	Displays the form name of the selected window.
Window	Displays the name of the selected window on which the report will be run.
Include Local Fields	This checkbox changes which fields are shown in the Fields list. With the box checked, all fields created as part of the current form will be shown along with table fields and window controls, such as buttons, dropdown lists, etc.

Fields

This list displays all of the buttons available on the selected window. Choose the desired button and then click the Select button to close the Field Lookup window and return the selection to the wizard.

Window Example – Field Lookup



Help Me Choose - Button Picker

The **Help Me Choose** button puts the wizard into a “Picker mode”. When opened from the **Print Initiation** tab, this mode is used to click on the button from which the Forms Printer Plus report is to be run. To choose the button using the picker, first click on the **Help Me Choose** button from the **Print Initiation** tab. Dynamics GP will be brought to the foreground. If the window chosen from the Window tab was not closed, it should be the focused window. If it isn't, navigate Dynamics GP through the normal menu selection or other navigation methods and open the window chosen on the **Window** tab.

Once the window is open, Picker mode will be indicated by a change in the cursor to the image shown below:



Click on the desired window button to select it and return the button information back to the Forms Printer Plus **Print Initiation** tab.

Note: In Dynamics GP 2015 R2, a new window ribbon bar was implemented. The Forms Printer Plus Button Picker WILL NOT recognize buttons on this ribbon. You will need to use the Field Lookup window and select the print button manually if using the R2 ribbon bar.

Because the window has already been selected in the Window tab, Picker Mode will not allow any button except those on the selected window to be returned to the wizard.

Picker mode can be canceled at any by returning to the Forms Printer Plus Setup or Wizard and clicking the Cancel Picker button shown in place of the Help Me Choose button.

You may find that not all fields on the window are selectable with the Picker. If this is the case, use the Field Lookup window to manually select from a list of available fields. Report Tab

The Report tab is used to determine whether the Forms Printer Plus report will be a Crystal or SSRS report. With that determination made, the path to the Crystal Report or the selection of the published SSRS report is made.

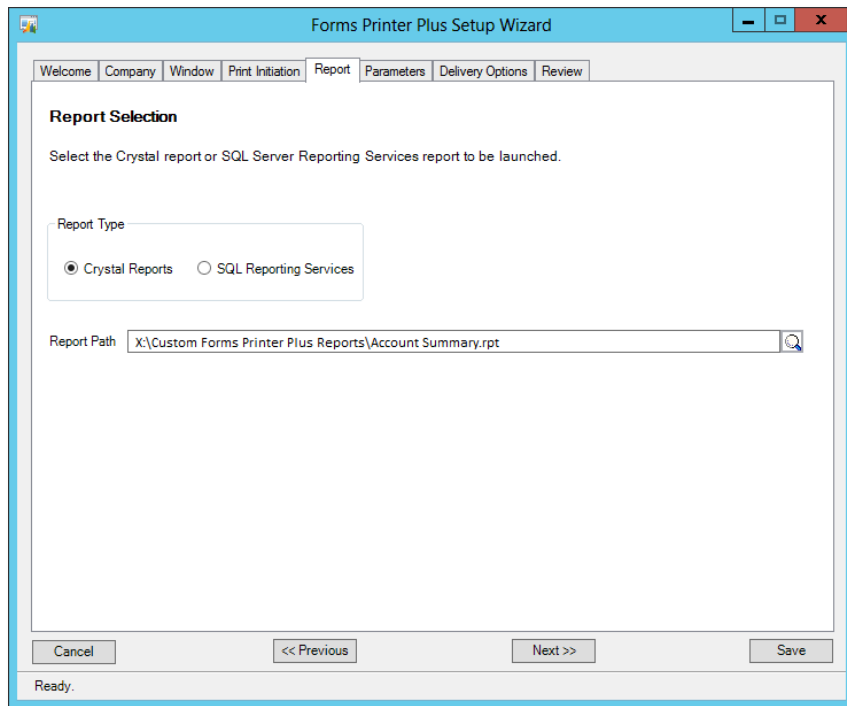
Tab Buttons

Button	Description
Report Lookup	This button opens either the Open window to select the physical Crystal report file or the SSRS report list to select the published SSRS report depending upon the selection made in the Report Type radio group.

Tab Fields

Field	Description
Report Type	This radio group is used to select between the available report types: Crystal Reports or SQL Reporting Services reports.
Crystal Report	This default radio option enables the Report Path Lookup button to browse the file system for the physical Crystal Report .rpt file.
SQL Reporting Services	This option enables the Report Path Lookup button to open the Select Report window listing the published SSRS reports.
Report Path	This text field displays the path / url and name of the report selected by the Report Lookup button.

Window Example - Report



The image shows a screenshot of the 'Forms Printer Plus Setup Wizard' window, specifically the 'Report Selection' step. The window has a blue title bar and a tabbed interface with tabs for 'Welcome', 'Company', 'Window', 'Print Initiation', 'Report', 'Parameters', 'Delivery Options', and 'Review'. The 'Report' tab is currently selected. Below the tabs, the title 'Report Selection' is displayed. A message states: 'Select the Crystal report or SQL Server Reporting Services report to be launched.' Below this, there is a 'Report Type' section with two radio buttons: 'Crystal Reports' (which is selected) and 'SQL Reporting Services'. Below the radio buttons, there is a 'Report Path' text box containing the path 'X:\Custom Forms Printer Plus Reports\Account Summary.rpt'. At the bottom of the window, there are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'. The status bar at the very bottom indicates 'Ready.'.

Forms Printer Plus Setup Wizard

Welcome Company Window Print Initiation **Report** Parameters Delivery Options Review

Report Selection

Select the Crystal report or SQL Server Reporting Services report to be launched.

Report Type

☒ Crystal Reports ☐ SQL Reporting Services

Report Path X:\Custom Forms Printer Plus Reports\Account Summary.rpt

Cancel << Previous Next >> Save

Ready.

Parameters Tab

The Parameters tab is used to display the parameters on the selected report and choose how the values for those parameters will be supplied. The value passed to the report's parameters can come from manually entered values entered by the user at the time the report prints, manually entered input when the report setup is defined, or from field values on the selected window.

Tab Buttons

Button	Description
Help Me Choose	This button puts the wizard into a "Picker" mode that assists the user in selecting the button to be used in launching the report. See the Help Me Choose Field Picker for details.
Field Lookup	This button opens the Field Lookup window allowing the user to manually select button to be used in launching the report. See the Field Lookup Window for details.

Tab Fields

Field	Description
Parameters	This field lists each of the parameters found on the report selected on the Report tab.
How parameter values are obtained	This radio group determines how the parameter selected in the Parameters list will be populated at the time the report runs.
Data Type	This read only field shows the data type of the parameter as defined in the report.
Prompt for value using the following text	This radio button option and text box enable the selected parameter value to be supplied by the end user manually. The text entered into the text field will be presented to the user in a dialog box where they must type a value to be passed to the selected parameter.
Use the following value	This radio button option enables a text box where a value for the parameter can be defined and saved during setup.
Get the value from the following window field	This radio button option and text box enable the selected parameter value to be supplied from a field value on the window selected on the Window tab. The field to be used can be selected manually using the Field Lookup Parameter window or by point and click with the Help Me Choose Parameter Field Picker.
Use Default value from the report	This radio button is enabled if the selected report parameter has a predefined default value. This selection allows Forms Printer Plus to 'ignore' the selected parameter and not try to pass a value to it.
Current User ID	This radio button allows you to pass the User ID of the currently logged in user to a parameter on the report.
Current Company ID	This radio button allows the Company ID string to be passed to a report parameter. This enables the company to be referenced for Datasource access in printing SSRS reports. In SSRS and Crystal Reports it provides a way to programmatically access company specific information or control formatting based on company.

Note: If the selected report has more than one parameter, you will need to select each parameter individually in the parameters list by clicking on it to highlight it. Then, define the manner in which its value is to be obtained by selecting the desired radio button option and supplying the required value.

Window Example - Parameters

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Parameters' tab. The window has a title bar with standard Windows controls and a tabbed interface with tabs for 'Welcome', 'Company', 'Window', 'Print Initiation', 'Report', 'Parameters', 'Delivery Options', and 'Review'. The 'Parameters' tab is active, displaying the 'Parameter Setup' section. Below the title, instructions state: 'Specify how the report parameter values are obtained. Select a parameter from the list to specify the source of the parameter value.' A list box on the left, titled 'Parameters', contains one item, 'Account Index', which is highlighted. To the right of the list box, the 'Parameter Data Type' is set to 'Currency'. Below this, a section titled 'How parameter value is obtained' contains four radio button options: 'Prompt for value using the following text:' (with a text input field containing 'Enter Account Index:'), 'Use the following value:' (with a text input field), 'Get the value from the following window field:' (selected, with a text input field containing 'Account Index' and 'Help Me Choose' and 'Field Lookup' buttons), and 'Use default value from the report' (with sub-options 'Current User ID' and 'Current Company ID'). At the bottom of the window are 'Cancel', '<< Previous', 'Next >>', and 'Save' buttons. The status bar at the very bottom indicates 'Ready.'

Field Lookup – Parameter Window

The Parameter Field Lookup window, when opened from the Print Initiation tab is used to select the button from which the Forms Printer Plus report will be run. The selection of the button is made manually on this window by choosing from the list of buttons available on the window chosen on the **Window** tab.

Note: If unsure of the button, the **Help Me Choose** option provides a ‘point and click’ selector that will identify the button by clicking on it.

Picker mode can be canceled at any time by returning to the Forms Printer Plus Setup or Wizard and clicking the **Cancel Picker** button shown in place of the **Help Me Choose** button.

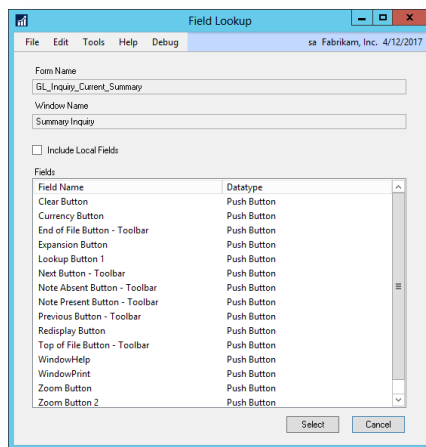
Window Buttons

Button	Description
Select	This button closes the Field Lookup window and returns the selected information to the wizard.
Cancel	This button closes the Field Lookup window without returning information to the wizard.

Window Fields

Field	Description
Form	Displays the form name of the selected window.
Window	Displays the name of the selected window on which the report will be run.
Include Local Fields	This checkbox changes which fields are shown in the Fields list. With the box checked, all fields created as part of the current form will be shown along with table fields and window controls, such as buttons, dropdown lists, etc.
Fields	This list displays all of the fields available from the selected window which can be chosen to supply the parameter value. Choose the desired field and then click the Select button to close the Field Lookup window and return the selection to the wizard.

Window Example – Field Lookup



Help Me Choose – Parameter Field Picker

The **Help Me Choose** button puts the wizard into a “Picker mode”. When opened from the **Parameter** tab, this mode is used to map parameters on the select report with fields on the window that can supply that value to the parameter. To choose the field using the picker, first click on the **Help Me Choose** button from the **Parameter** tab. Dynamics GP will be brought to the foreground. If the window chosen from the Window tab was not closed, it should be the focused window. If it isn’t, navigate Dynamics GP through the normal menu selection or other navigation methods and open the window chosen on the **Window** tab.

Once the window is open, Picker mode will be indicated by a change in the cursor to the image shown below:



Click on the desired Field to select it and return the field information back to the Forms Printer Plus **Parameter** tab.

Note: Only fields visible on the window can be selected while in Picker mode. Many other hidden fields are available with valid data and may be desired as the source of a parameter’s value. To select any of these hidden fields, you must use the Field Lookup where the entire list of fields on the window are displayed.

Because the window has already been selected in the Window tab, Picker Mode will not allow any field except those on the selected window to be returned to the wizard.

Picker mode can be canceled at any time by returning to the Forms Printer Plus Setup or Wizard and clicking the Cancel Picker button shown in place of the Help Me Choose button.

Delivery Options Tab

The Delivery Options tab is used to define default options relating to report dissemination. When printing a Forms Printer Plus report, the end user will be presented with a Report Options window where Preview, Print, and To File options will be available. In addition, the option to **Deliver** will also be available from the Print Options menu. The settings for this selection are determined on the **Delivery Options** tab. All settings determined in this setup become the default when **Deliver** is selected from the Report Options window and all delivery options apply automatically without the need for end user intervention or selection.

Window Example – Delivery Options

Window Fields and Controls

Fields	Description
To 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 Plus will create the exported file. This is the path to the directory, and does not include the file name. This folder can be determined in one of two ways: Using the Folder Browse Button. Forms Printer Plus automatically names the file to ensure a unique file name is created. The file is named with the convention: <i>Report Name System Date System Time.format</i> Where Report Name is the Report Setup Name entered on the Review tab. For Example: My Plus Report 06 25 01 8 30 27AM.PDF

	2. Using the editor window to build the folder path using manually entered text and / or tags from window field values. <i>NOTE: Whether manually selected, entered, or built through tags, the folder must exist. Forms Printer Plus will not create the folder.</i>
Folder Path	This button opens the Folder Path window which allows the building of the Export Directory when using the To File feature of Forms Printer Plus. See the Folder Path section for more detail.
To Printer	Selecting the 'To Printer' checkbox enables the Forms Printer Plus printer output. Marking this option will send a copy of the report to the printer whenever the Deliver option 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 Plus to print the selected 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. Specific Printer The specific Printer option enables the Printer selection button where a Print window can be opened and used to define the printer and its default settings.
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.
To Mail	Selecting the 'To Mail' checkbox, allows delivery of the selected document by Email.
Use Outlook	Forms Printer Plus will automatically detect whether Microsoft Outlook is installed, and enable or disable the Microsoft Outlook Radio button and some of the Email options accordingly.
Note: If using SSRS 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 Plus 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 'Email 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 Email will be sent automatically to the recipient.
Mail From	The 'Email 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 Plus Delivery, the client workstation must have a Messaging Application Programming Interface (MAPI) compliant Email 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 Plus's Emailing functionality, it is recommended to use Microsoft Outlook 2000 or Greater. Additional help with Email issues can be found in the Troubleshooting Email Errors section of this document.
Mail To	The Email To radio group allows a selection of either Prompt For Email or Manually Entered. To have the printing user enter an Email address at the time the Email is created, leave the default of 'Prompt'. To enter a hardcoded Email at the time of setup, mark the Manually entered option and enter a valid Email Address or semi colon separated list of addresses.
Send Option	The Send Option dropdown list allows you to select the destination for the created Email. The selections for Send Options are described below. • <i>Send Directly to Email Recipient:</i> Automatically sends the Email. • <i>Save To Outlook Drafts folder:</i> Creates the Email in the Drafts folder. Email must be sent manually. • <i>Save to Outlook Outbox:</i> Creates the Email and saves it to the Outbox. Email must be sent manually.

	• <i>Save to Outlook Outbox Delayed:</i> Creates the Email and saves it to the Outbox. Email will be sent automatically at the specified time selected by the Hours to Delay option. • <i>Display created Email:</i> Creates the Email displays the Email rather than sending or saving it. Once any required modifications are made, the Email 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 Email's delayed send property. For example, if the Email 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 Email would be created in the Outbox, and would stay there until 10:15 PM, and then it would be Emailed to the selected Recipients.
Attachment Format	The Attachment Format dropdown list allows you to specify the format for the Email attachment.
Attachment Name	The Attachment Name allows you to enter the text, as it will appear in the Email 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: \ / ? * : " < > See the Editor Window for specifics on creating a parameterized Attachment Name.
Subject	Email Subject sets the text, as it will appear in the Email Subject line. To create a calculated subject, open the Email Subject Editor window using the expansion button. See the Editor Window for specifics on creating a parameterized Subject.
Message	This field displays the Message as it will appear in the Email body. To create a calculated Message, open the Email Message Editor window using the expansion button. See the Editor Window for specifics on creating a parameterized Message.

Review Tab

The review tab provides includes a field for naming the report setup as well as a summary of the options selected across all of the setup tabs in the wizard. Use it as an opportunity to check that the setup is as expected.

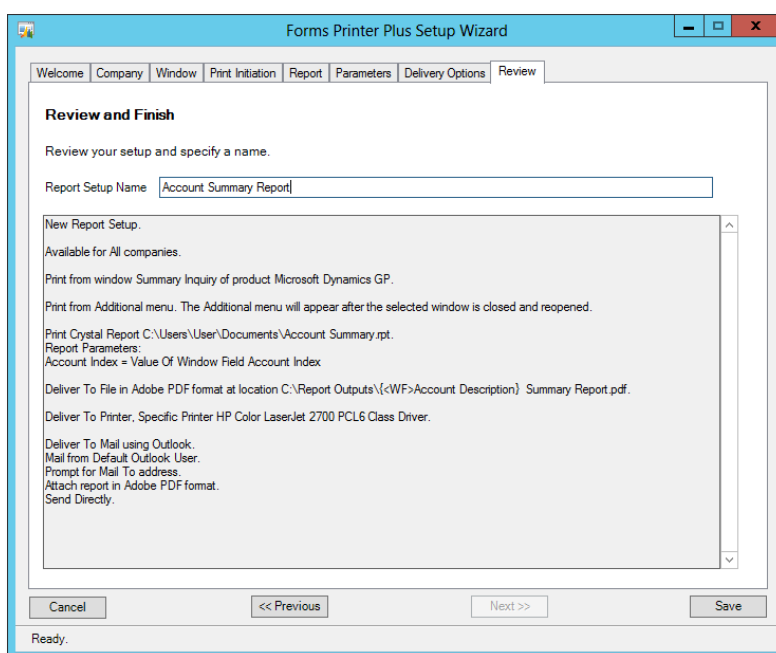
*At this point you can move back and forth between the various setup tabs as needed to correct or adjust settings.

Once completed, clicking the **Save** button will create the setup and return to the Forms Printer Plus Setup window. If there are any issues, a dialog box identifying information that might be missing or incorrect is displayed.

Window Fields

Field	Description
Report Setup Name	This field is used to enter the display name of the report setup.
Review pane	The review pane shows the selections made on the various windows.

Window Example



Note: *Be aware that a change on one tab can have affects across all of the other tabs in the setup. A change to the selected window or report for example can greatly change the setup thereby facilitating the need to redo most if not all of the setup.

Printing with Forms Printer Plus

Once setup has been completed, the report and its delivery will be available for printing using the defined button or menu item.

Note: After setting up your report, to ensure that the printing works as expected, be sure to close and reopen the window selected in the Window tab before printing your report.

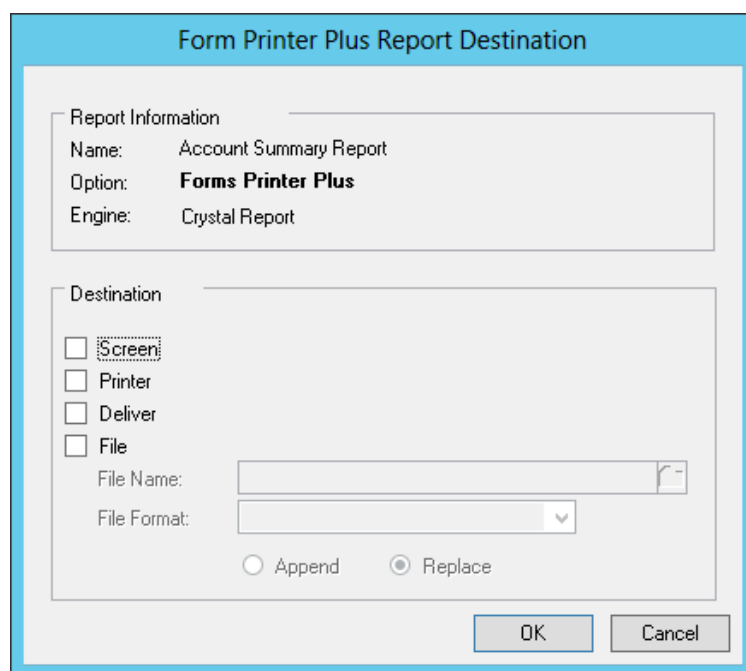
To print the report, close and reopen the window on which you've added the report. Fill the window with the intended record and then click the defined button or select the created menu option from the Additional menu. Forms Printer Plus will begin the printing process and present the Forms Printer Plus Report Destination window where options can be selected for processing the report.

Report Destination Window

The Report Destination window in Forms Printer Plus is similar to that which is found in Dynamics GP with the exception of the added **Deliver** option and the available file formats for export which vary depending upon whether the report was created in Crystal or SSRS.

Choosing the **Deliver** option means that Forms Printer Plus will use those options defined in the **Deliver** tab of the setup and will send to file, printer and / or Email as defined.

Window Example – Forms Printer Plus Report Destination



The screenshot shows the 'Form Printer Plus Report Destination' dialog box. It has a light blue title bar and a white background. The dialog is divided into two main sections: 'Report Information' and 'Destination'. In the 'Report Information' section, there are three labels: 'Name:' with the value 'Account Summary Report', 'Option:' with the value 'Forms Printer Plus' (bolded), and 'Engine:' with the value 'Crystal Report'. The 'Destination' section contains four radio buttons: 'Screen' (selected), 'Printer', 'Deliver', and 'File'. Below these are two text boxes: 'File Name:' and 'File Format:'. At the bottom of the 'Destination' section are two radio buttons: 'Append' and 'Replace' (selected). At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Forms Printer for Web Client

Forms Printer for Web Client allows for a limited set of Forms Printer Base, Project and Plus capabilities to be available in the Dynamics GP Web Client. With Forms Printer for Web Client, the user can:

Print to Screen

When printing to screen, the document is saved to user's temp folder on server as a PDF. The PDF is then transferred to the user's selected client temporary folder, and is then opened on client with the client's default PDF reader.

Note that Print to Screen works only when the Silverlight application has been trusted. If Silverlight has not been trusted, the pdf document created will be saved to the client temporary folder.

Print to Printer

When printing to a printer, the document is saved to user's temp folder on server as a PDF. The PDF is transferred to the user's selected client temporary folder, and is then printed on the client machine with the user's default printer.

Print to File

When printing to file, the document is saved to user's temporary folder on server in selected format. Then, the document is transferred to user's selected client temporary folder.

When choosing to print to file from the Web Client using Forms Printer, the file path on the Report Destination window is disabled and will be set to the user's client temporary folder. The file format must be selected from the File Format dropdown list which is populated using the [Report Export formats](#) for the report engine in use. The file naming convention follows the Forms Printer standards for single documents, batches and ranges as defined here: [File Export](#).

Report Destination

Report Information

Name: Invoice

Option: ☐ Ask Each Time

Destination

Report Type: Standard

☐ Screen

☐ Printer

☒ File

File Name: Selected Client Folder\Report Name

File Format: Adobe PDF (selected), XML Document, Image, HTML 4.0 Document, HTML 3.2 Document, MHTML Document

Cancel

Web Client Functional Differences

It is important to understand the differences between Forms Printer and Forms Printer for Web Client functionality.

Forms Printer Setup

The Forms Printer Setup windows are not supported on the Web Client. All setup must be performed on a local client machine.

Forms Printer Delivery System

In the Web Client, the Forms Printer Delivery setup does not apply. Forms Printer will replace the Report Writer report with the report selected in Forms Printer Setup, including all levels from document through Master Record setup.

Any predefined To File, To Printer, or To E-mail settings will be ignored in the Web Client. Only the user selected Print to Screen, Printer or File options affect the report output.

Check Printing

The Forms Printer functionality for printing Payroll and Payables checks has been disabled in the Web Client.

Parameter Prompting Reports

Reports designed to have more parameters than expected by Forms Printer Base reports or reports with Prompt as the parameter option for Forms Printer Plus will not function properly in the Web Client as there is no way for Forms Printer to present the parameter dialog.

Controlling Forms Printer on the Web Client

Forms Printer allows for some control of the Web Client functionality through the use of Dex.ini settings. If you are unfamiliar with the Dex.ini or how to use / edit the file, please contact an internal, partner or Accountable technical resource for assistance.

Dex.ini Settings

The following Dex.ini settings can be used to control the Forms Printer for Web Client behavior.

ASIFPENABLEONWEBCLIENT

This dex.ini setting can be added and set to FALSE to disable Forms Printer on the Web Client.

IsWebClient

This dex.ini setting can be added or set to TRUE to emulate Forms Printer for Web Client behavior on a desktop installation.

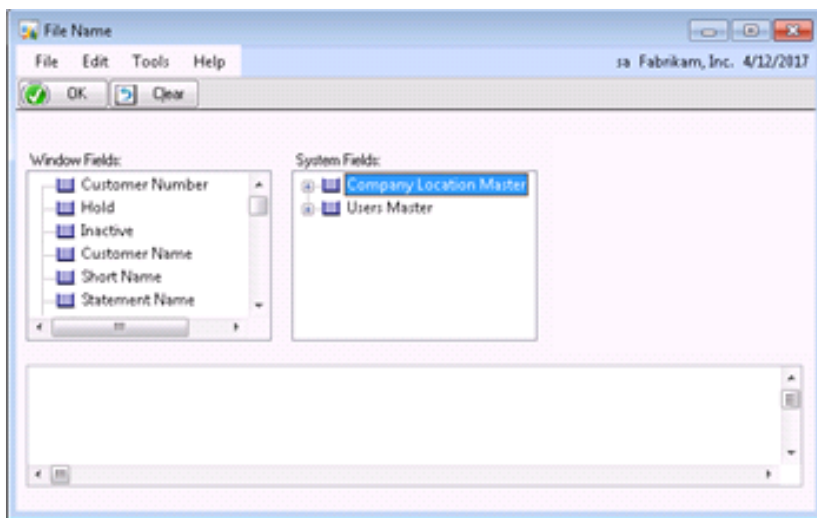
NOTE: Not all Forms Printer functionality is available in the Forms Printer for Web Client module due to limitations in the Dynamics GP Web Client's support for third party add-ons and functionality.

Secondary Setup Windows

Several windows in Forms Printer and Forms Printer Plus are accessed from multiple buttons on the setup windows for the purpose of selecting or entering various values. Those windows are described in this section.

Folder Path Window

The Folder Path window is used to create a custom file path for use when exporting to file through the delivery system. This feature allows the folder to be created at runtime based on data associated with the selected window. All fields associated with the window are accessible for the parameterized folder path and are listed in the Window Fields list.



When creating the folder path, there are several rules that Forms Printer Plus will follow. Those are:

1. The folder path must not contain any characters that are invalid in a Windows folder path.
2. Forms Printer Plus will look for the path as defined and, if found, will create a file using the text provided as the Report Name in setup. For example, the folder path below would expect there to be a folder with the Customer Number as its name that exists as a subfolder named "myreportfolder" on the "n" drive.

ONLY FOLDER DEFINED: n:\myreportfolder\{<WF>Customer Number}

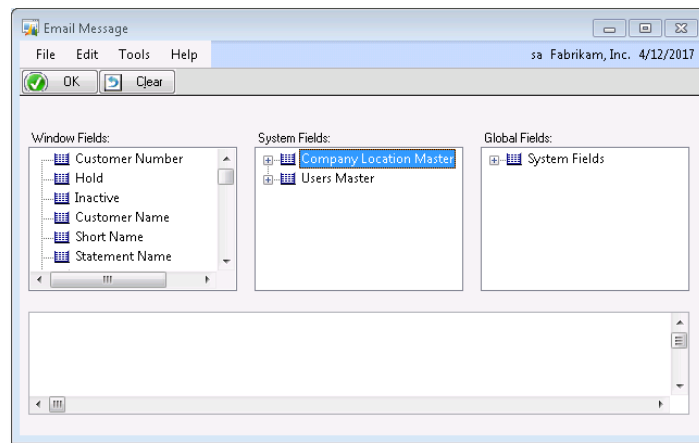
3. The defined folder path **MUST** exist and be a valid path from the printing workstation. Forms Printer Plus will not try to create the folder path at runtime. If the folder does not exist, reports defined to go to that folder will fail and must be reprinted.
4. Any part of the folder name can be parameterized but when parameterizing the folder path, remember rule #2.

5. If a duplicate file name is created as a result of exporting to file, Forms Printer Plus will overwrite the Results

Editor Windows

The Editor Windows (Message, Subject and Attachment) are used to create the various elements of the Email. These elements can be manually entered text, or a combination of manually entered text and parameter fields added from specific window fields, system fields, and global fields. When the Email element is created and assigned to a particular report setup, Forms Printer Plus will fill in any parameters using data from the record displayed in the selected window at the time the report is being Emailed.

Window Example



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 Plus to pull the correct information. The parameters shown in the message will be replaced with the actual value of the fields when the Email is created. These parameters should not be altered in any way.

Window Fields

The Window Fields List displays the fields available to be used as parameters from the selected window. Double clicking on a field adds that field to the text box.

System Fields

The System Fields List displays system fields available to be used as parameters. Double clicking on a field adds that field to the text box.

Global Fields

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

Forms Printer Sample Reports

The installation of Forms Printer includes sample reports for Forms Printer Base and Forms Printer for Project. These reports are found in the Forms Printer subfolder of the Dynamics GP directory on any machine where Forms Printer has been installed.

There you will see subfolders for Crystal and SSRS Reports and within those folders, a directory with reports organized by Series.

For more information on using and modifying the sample reports, see the reporting tool specific sections for:

[Modifying Sample Crystal Reports](#)

[Modifying Sample SSRS Reports](#)

Note that the sample reports are provided as a reference only so that you have a quick and easy way to evaluate or demo the product. Changes to, and support of, these reports is subject to normal support incident policy and Accountable Software makes no claim as the accuracy or supportability of the report content.

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 Crystal Reports

Step 1. Note Current DSN

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

Step 2. Create a Temporary DSN

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 3. Set Datasource on Report

- 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 4. Add SQL Objects, as Needed

If additional Tables, Views or Stored Procedures are needed, follow the Crystal Reports Application documentation for adding tables in the Crystal Report Designer using the ASIFPTemp DSN.

Step 5. Save the Report

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 6. Remove the Temporary DSN

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 Sample 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.

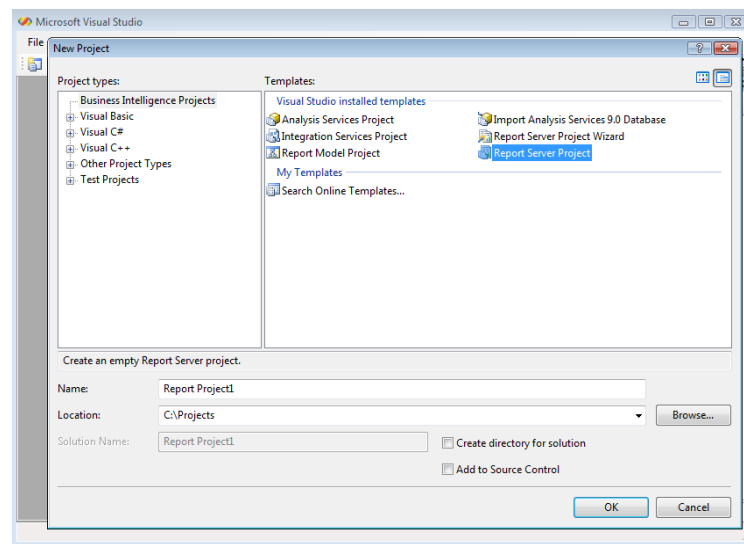
Steps for Customizing SSRS Report Templates

Step 1. Create New Report Server Project.

Modification of an SSRS report first requires the creation of a new Report Server project in your application.

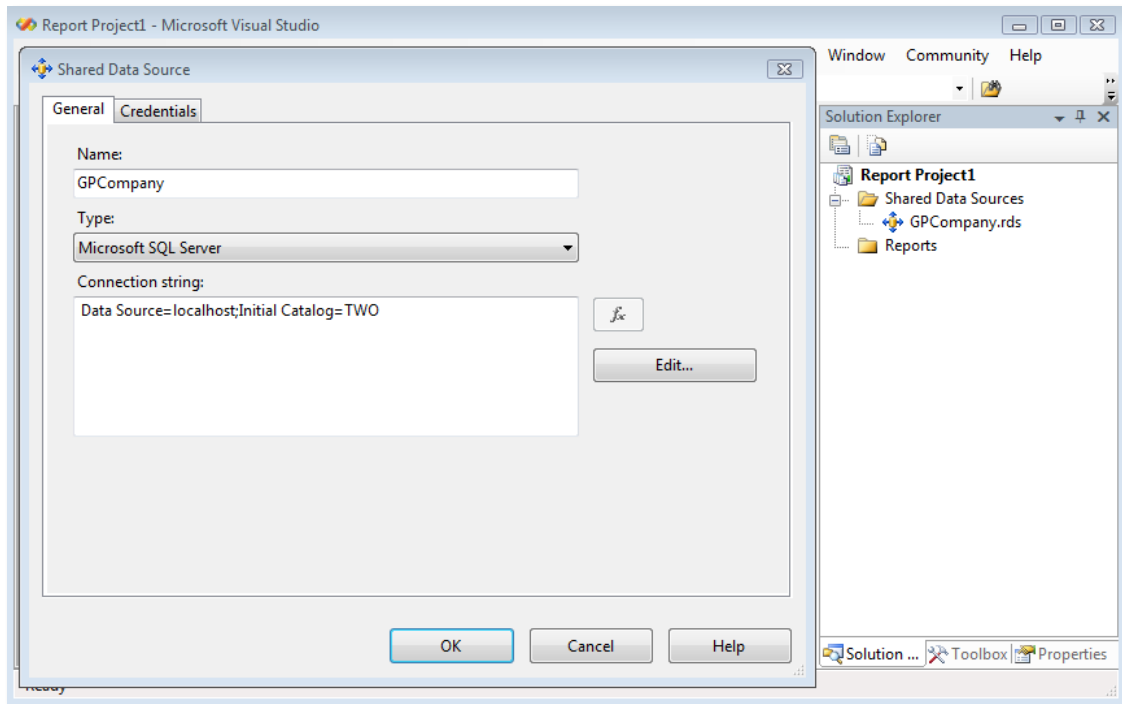
Launch either Business Intelligence Development Studio or Visual Studio.

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.



Step 2. Create New Shared Data Source

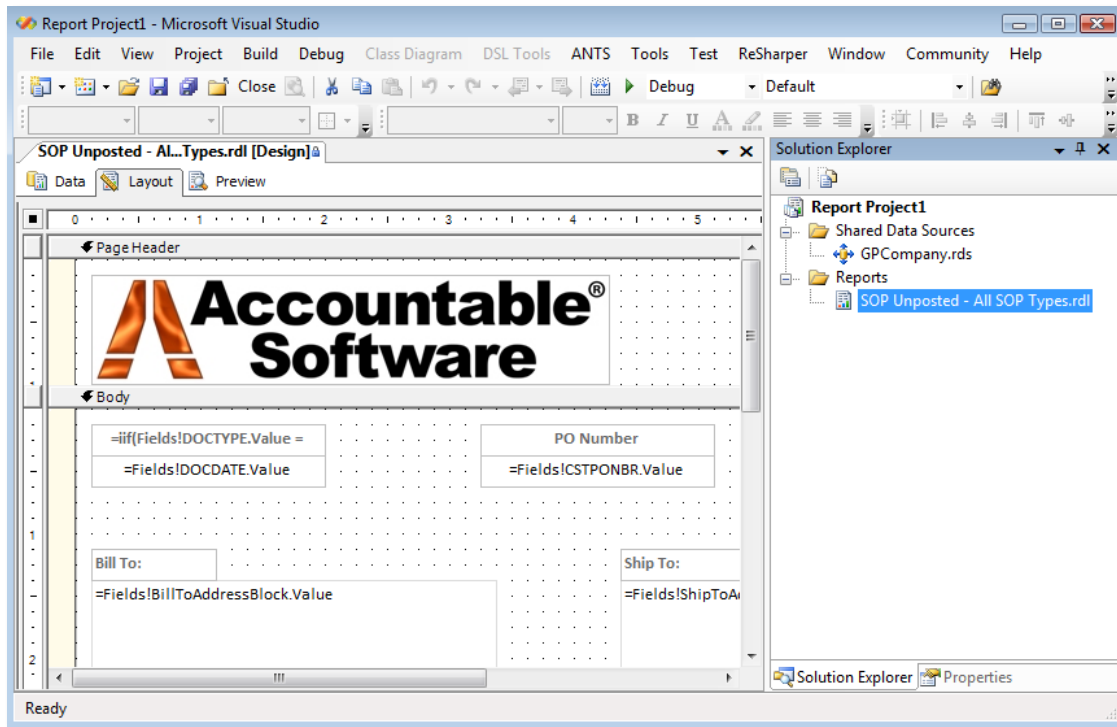
All Forms Printer SSRS reports are configured to use a data source called **GPCompany** for data retrieval. You will need to create this data source in your project. The new data source should point to a Dynamics GP company database on your SQL Server. To create the data source, right click on the Shared 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.



Step 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 **SSRS Report Templates**, a sub folder of the Dynamics GP client application folder.

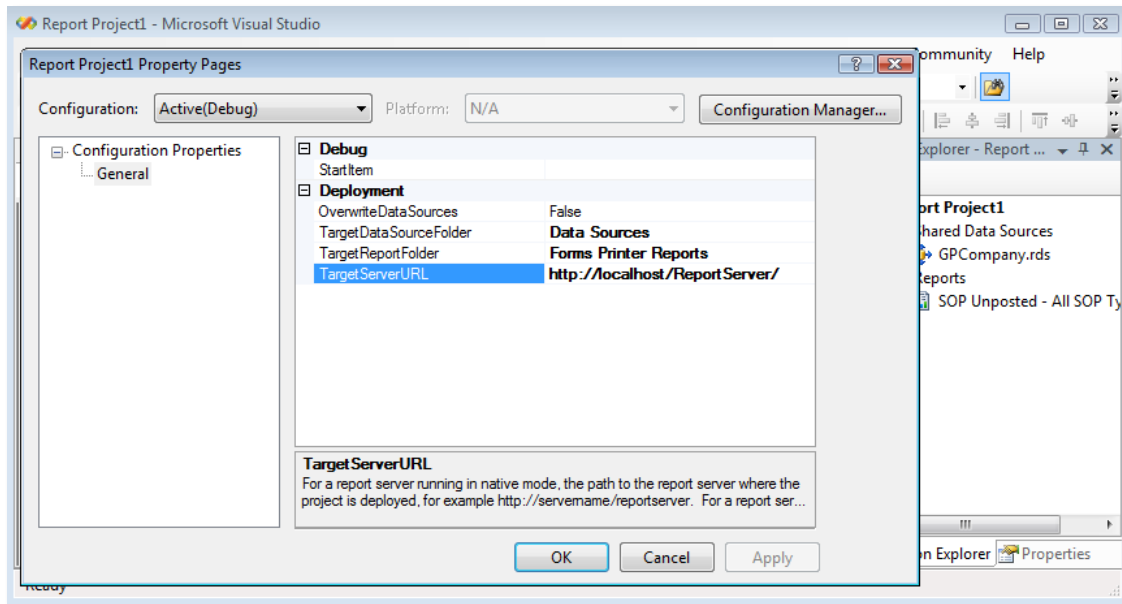
Add the report(s) that you wish to modify. The report layout, and SQL query can then be modified as desired.



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.

Step 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 properties 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.

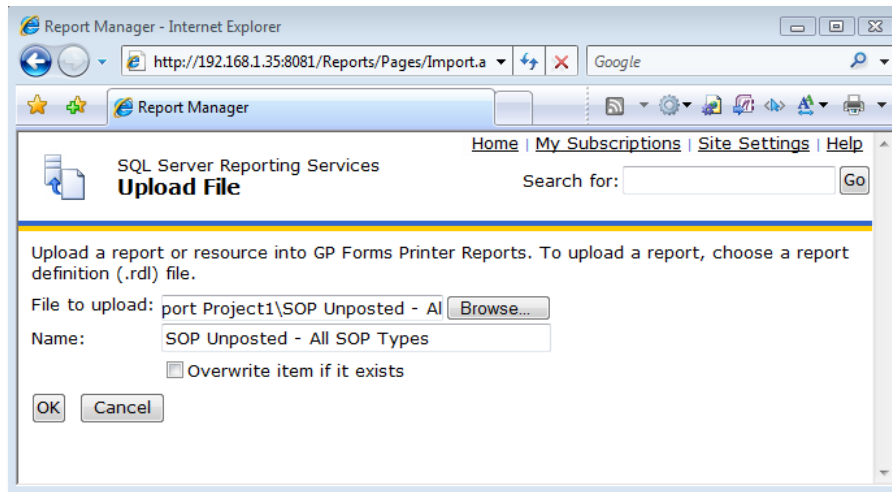
Deploying Unmodified Forms Printer SSRS Reports to a Report Server

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

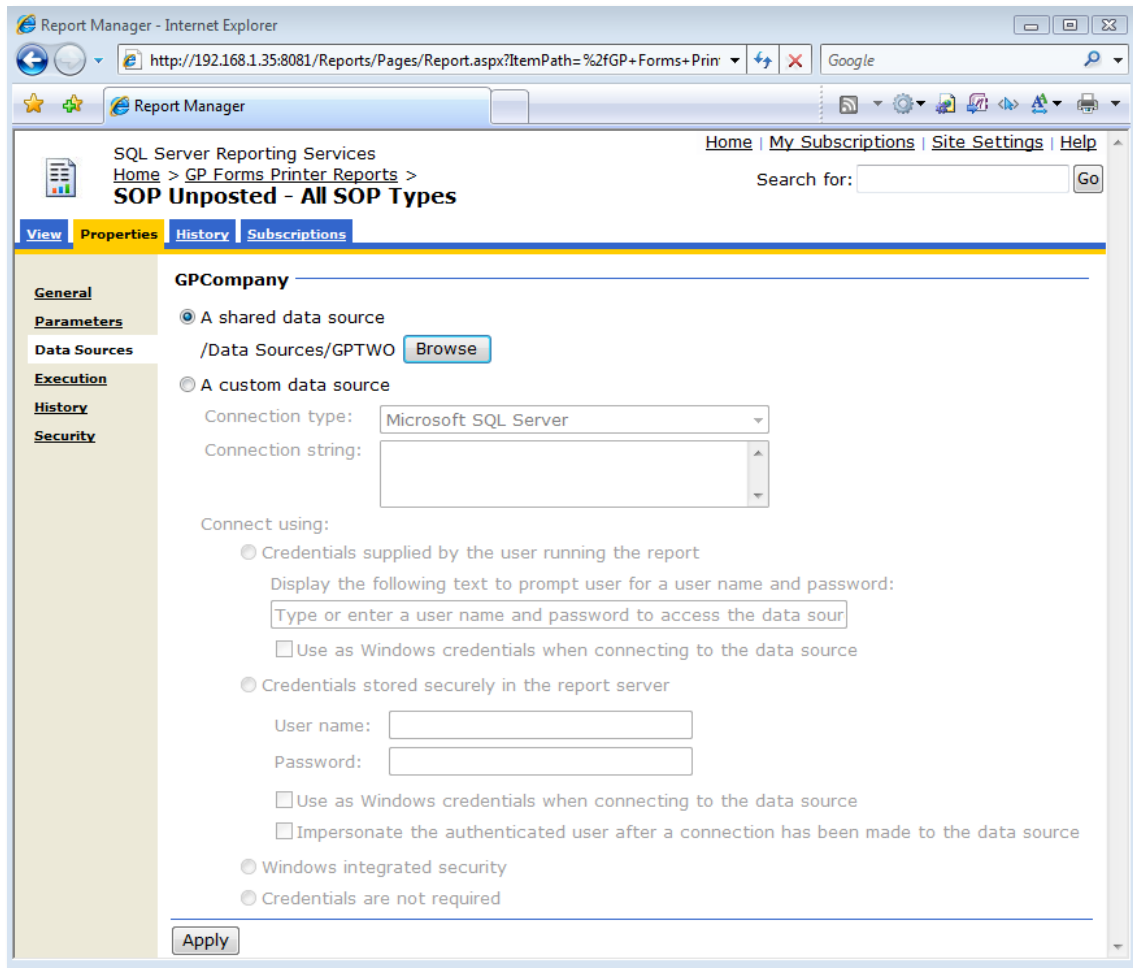
Launch your web browser and navigate to the Reporting Services Report Manager web application. By default, the URL is **http://<servername>/Reports**. Click the **Upload File** link on the Contents tab of the Home page, or on any folder page. This will open the Upload File web page. Browse to the report 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

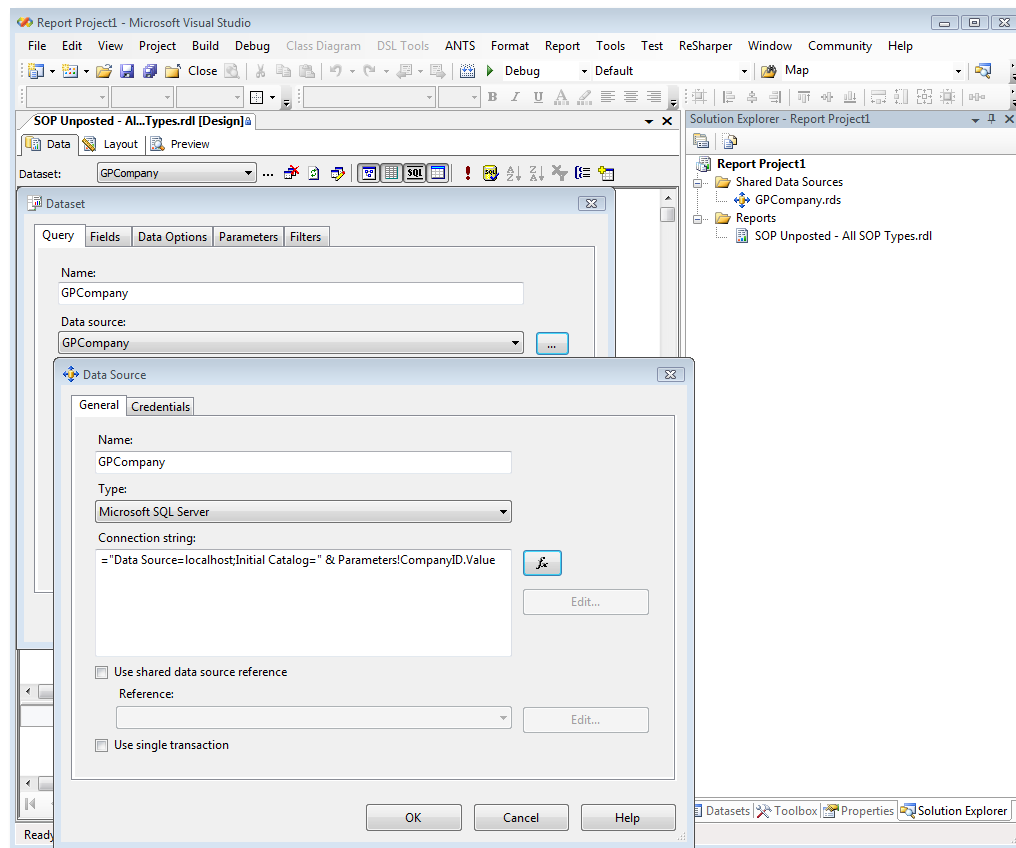
Using the Report Manager Web application, a report can be published to multiple folder locations on the Report Server, with each copy configured to use a different company specific data source.

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 **GP Company** 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

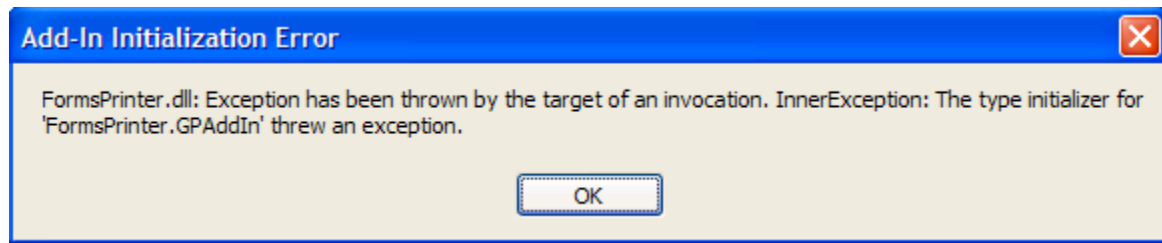
While a report used in Forms Printer will not error without the suggested tables, joins and selection criteria, there is a VERY likely chance that the report will not display the correct data intended by the Dynamics GP printing process if any of these considerations are not followed.

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 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.

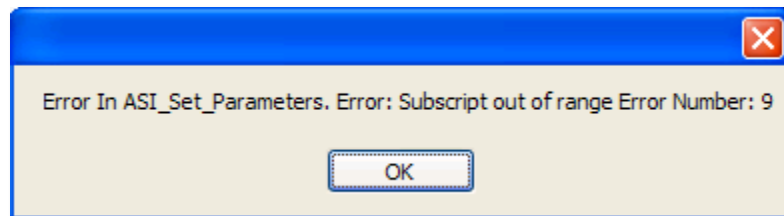
Registration Errors

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

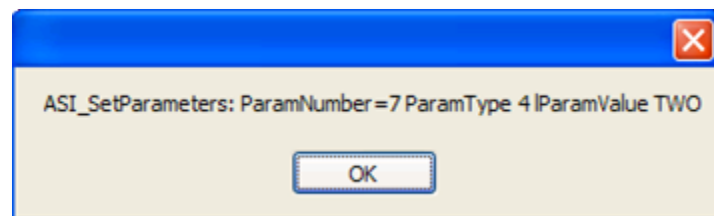
Cause	Resolution
Mistyped Registration Keys	Double check the keys entered and use cut and paste if possible.
Incorrect Site name	Double check the site name on the Registration Keys document provided by Accountable Software. If there is a discrepancy from your actual Site name, contact us to receive a 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 Email 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
Forms Printer Setup Window either does not open or takes an unusually long time to open. OR Error “Can’t get address list object with this name from Redemption object” or similar. OR Some functionality of Mail delivery is restricted similar to the restrictions for Crystal MAPI.	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.
	The client machine fails or causes a long delay while trying to retrieve the Exchange ServerGlobal 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. OR 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. OR You can edit the Address List and manually enter a list of as many From Address choices as needed, by entering a comma separated list. For Example, by changing the Dex.ini setting to: ASIFPOutlookFolder = person1@yourdomain.com, person2@yourdomain.com, person3@yourdomain.com Forms Printer will then present these choices in the E-mail From dropdown List of Forms Printer Setup.

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: - Find the key: HKEY_CLASSES_ROOT\CrystalRuntime.Application.11\CLSID - Copy the listed GUID - Search for that GUID under the key: HKEY_CLASSES_ROOT\CLSID - When found, expand to see the folder InprocServer32 - Click on the folder to see the results on the right hand pane - 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. Be 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. Note that Crystal 2008, 2012 and 2014 may also be used but any features added by these versions will not be available through the Forms Printer version of the Crystal runtime. 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, you can use Forms Printer Plus to add the report to any window in your Dynamics GP solution.

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 Email 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