Forms Printer

For Dynamics GP

What's New

In Forms Printer Base System

Forms Printer for Project Accounting

Forms Printer Plus

Forms Printer for Web Client

ACCOUNTABLE SOFTWARE

Contents

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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) - support@accountable.com

When you call, or E-mail Accountable Software for support, please include the following information:

- Your name
- Your company name and phone number
- Product inquiring about and the version you are running (from the registration window)
- A brief description of the problem.

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Sales

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

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Product downloads, documentation and videos can be found on our website: www.accountable.com

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New E-mailing Features

The latest versions of Forms Printer has several new features and improvements to the E-mail Delivery functionality. This includes the newly added feature Reply To Selected E-mail, a new setup window to define the E-mail From List, and HTML Formatted E-mailing. See the Forms Printer User's Guide for full details on the use of the features described briefly below.

Exchange Web Services and SMTP E-mail Support

In addition to Forms Printer's integration to Outlook for E-mail Delivery, Forms Printer now supports Exchange Web Services and SMTP for E-mailing. Used in conjunction with the Forms Printer Logging feature, E-mail Delivery is now no longer tied to a local client install f the Outlook client.

Reply To Selected E-mail

With the new Reply To Selected E-mail option, Forms Printer can now deliver to a selected, or open E-mail in Outlook.

If your day to day use of Forms Printer more typically involves responding to incoming E-mails, today your process might involve delivering your documents to file, returning to Outlook to reply, then attaching the exported document manually, creating a reply message and sending.

With the Reply To Selected E-mail feature, you can click on the E-mail in Outlook, then from Dynamics GP, deliver the document and Forms Printer will automatically add the attachment and reply for you.

New E-mail From Setup Window

The E-mail From Setup window, added in build 149 of Forms Printer Base, provides a user interface for selecting the source of your addresses available when choosing the E-mail from address.

For example, you might want E-mails to always come from the sending user, you might want to retrieve a list of possible From E-mail addresses from your Exchange Server, or you may wish to have a small, controlled list of From Addresses where E-mails might always come from "Sales" or "Customer Service" rather than an individual user.

In earlier versions of Forms Printer, that list was modifiable only by manually editing a Dynamics GP Defaults File Entry. This new window makes the process of defining that list much easier and, it also means that you no longer need to enter the information on each workstation if a custom list of addresses is needed.

HTML Formatted E-mailing

E-mails delivered by Forms Printer can now include an HTML formatted body allowing you to include graphics, logos, colors, and any other elements you might have in your company E-mails that helps you create and enforce your brand.

New Reports

Direct Deposit Statement of Earnings

Forms Printer now includes the Direct Deposit Statement of Earnings report. The report can be added to Forms Printer Setup by selecting New, Microsoft Dynamics GP, Payroll Series, and report: Direct Deposit Statement of Earnings.

In support of this new report, Forms Printer now includes a SSRS and Crystal Reports sample report template. These can be found in the Crystal Report Templates\UPR folder and of the Forms Printer folder installed to the GP Client directory. They are titled: UPR Earnings Statement.rpt and UPR Earnings Statement.rdl.

For reprinting PM Remittance documents, Forms Printer is tied into the PM Transactions Navigation list where the Re-create Check Stub button shown below will print the Reprint Remittance:
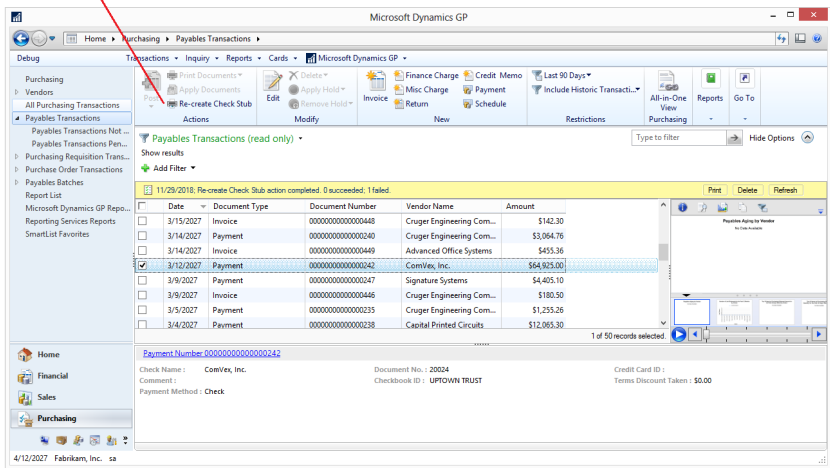
Reprint PM Remittance

Forms Printer now includes the Reprint PM Remittance report. Added to Forms Printer Setup separately from the existing PM Remittance, the reprint is a separate report and is printed from different windows from the initial PM Remittance.

In support of this new report, Forms Printer now includes a SSRS and Crystal Reports sample report template.
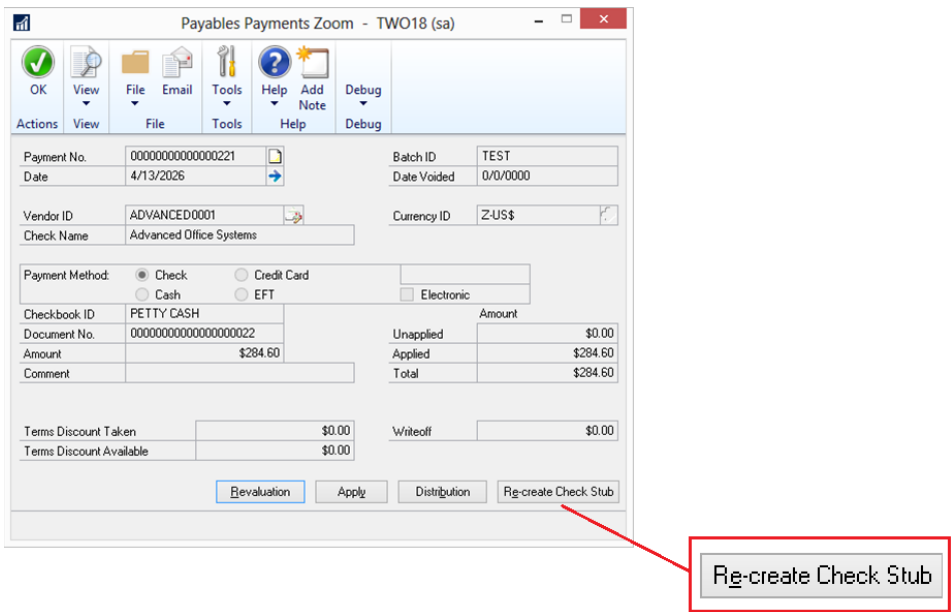
For reprinting PM Remittance documents, Forms Printer is tied into the PM Transactions Navigation list where the Re-create Check Stub button shown below will print the Reprint Remittance:

Usage Examples

The Payables Payments Zoom window, Re-create Check Stub button can also be used to reprint the PM Remittance.

New Print From Window - RM Transaction Batch Entry

By default in Dynamics GP, RM Transactions can not be printed by batch except under specific setup conditions. As of this release of Forms Printer, that ability has been enabled regardless of GP setup.

The functionality adds (if not already enabled by GP setup options) the Print button shown below to the RM window / ribbon.

Usage Example
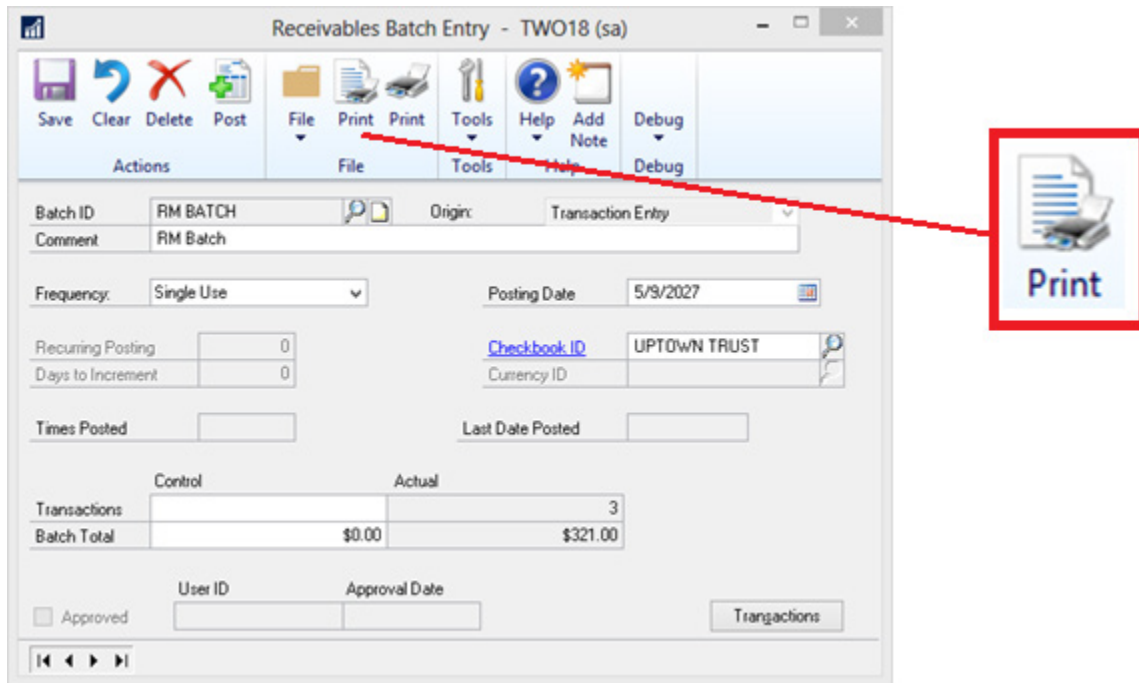
This print button opens the Print Documents window shown below:
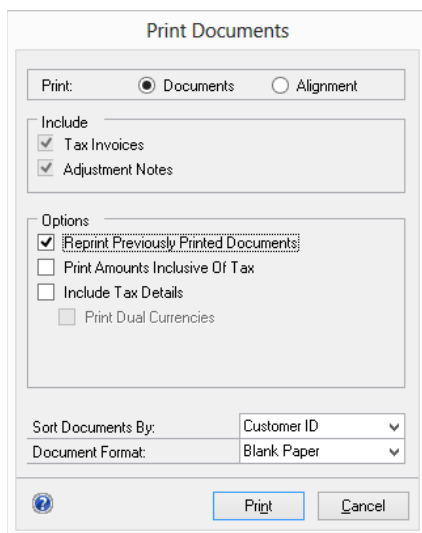
Improvements to Delivery Editor

When delivering with Forms Printer, the Export Path and file name as well as the Subject, Attachment, and Body of the Email can include Tokens. Those are fields from tables associated with the document being printed. A few improvements have been made to the Token functionality in this latest release.

Include Array Fields in the Editor Window Tokens

Fields in Dynamics GP that are an array data type can now be used as Tokens in Forms Printer Setup when defining the file export path, and the E-mail Subject, Attachment and Body.

An example of these array fields the RM Statement tokens. Statements include many useful array tokens including Aging Period Amounts and Descriptions, Document Array Descriptions, and the Statement Messages.

When inserting an Array field, Forms Printer will prompt for the array field index number.

Allow Brackets in Editor Text Fields

In previous versions of Forms Printer, the use of brackets ("{}") was limited to the start and stop characters for token fields and if brackets were found to be used without a token, the content could not be saved. This limited the ability of some Fax processors that also used the brackets as delimiter fields. New in this version of Forms Printer, brackets can now be used anywhere within the delivery editor windows. Upon saving the field, Forms Printer will warn of the existence of brackets outside of tokens but will still allow saving of the field.

New Advanced Features

Several new features considered "Advanced" have been added to Forms Printer due to the technical nature of the steps required to implement them have also been added. A brief description of each is included below. See the Forms Printer User's Guide for full details including example scripts and code for implementation of these advanced features.

Database Functions

The Database Function feature allows administrators of Forms Printer to use a SQL User-Defined function which generates a text output as part of Forms Printer's Delivery setup. The Database function feature can be used in the setup of the File Export path and name, the E-mail Subject, E-mail Body, and E-mail Attachment Name for all reports in Forms Printer Base System which support File Export and E-mail.

The Database Function feature opens up many possibilities for data access and use in Forms Printer Delivery. You can use it to format fields in a custom way, as our example below shows. You can use it to access tables and fields not currently in the available list, you can even use it to calculate the entire returned value for something like the E-mail Subject, file export or E-mail body.

Some examples of the use of Database functions might include returning custom content for the Email body or special formatting for a File Export Name.

While the previous release of Forms Printer included Database Functions specifically for SOP Documents and included additional setup steps to implement, in this release of Forms Printer, all document types now support the Database Function functionality and there are no additional setup steps required other than defining the Database Function as part of the delivery field.

Database Function Results as Text

Included with the expansion of the Database Function feature, the resulting value of a Database Function can now be a string or large text field allowing the contents of an entire Email Body to be returned from the function, for example.

Microsoft Dynamics GP Defaults File Settings

In addition to Forms Printer's functionality found on the Setup window, a series of Microsoft Dynamics GP Defaults File (Dex.ini) switches can also help configure Forms Printer for specific needs and environments. The list of switches which are user serviceable are detailed in the Forms Printer User Guide.

Pre and Post Processors

With the addition of Pre and Post Processing Stored procedures, Forms Printer can now call named stored procedures that administrators and implementors can use to execute custom processing as part of the Forms Printer printing process.

At this time, there are two Pre-Processors, or processors that is run BEFORE Forms Printer runs the reports. The Pre-Processors are used to determine which records to include and which records to exclude from the print run.

The Post Processor is called after the reports are printed. It is called for ALL documents and document types printed by Forms Printer. While there are currently only two specific pre-processors, the post processor can be used to record information about any or all reports printed.

SOP Preprocessor

The SOP Document Pre-Processing functionality allows implementors to create, and have Forms Printer execute, one of two SQL Stored Procedures that apply custom rules for determining which records to include in a SOP Document print run.

RM Preprocessor

The RM Statement Pre-Processing functionality allows implementors to create, and have Forms Printer execute, one of two SQL Stored Procedures that apply custom rules for determining which records to include in a Statement print run. This custom processing occurs in addition to the restrictions that already exist on the statement printing window in GP.

Post Processor

The Post-Processing functionality allows implementors to create, and have Forms Printer execute, a SQL Stored Procedure to run custom functionality at the completion of the Forms Printer print job. An example of how the post processor might be used would be archiving documents delivered by Forms Printer to maintain a history of those records sent by E-mail, saved to file, and/or printed.

Logging Forms Printer Delivery

The new Logging feature of Forms Printer Base System allows tracking of all delivery through Forms Printer including a snapshot of the setup at the time of the delivery as well as a recording of the delivery detail and any errors that occur.

This feature is especially effective when used in conjunction with the new Exchange Web Services and SMTP E-mail Methods feature.

Report Properties Setup

Report Properties replaces the Dynamics Default File settings for control of specific functionality with Forms Printer. The advantages to the Reports Properties window are that Properties can be managed in a central location rather than individual Dex.ini files and where appropriate, some settings can be controlled on a per User, Company, Report, and / or Master ID basis.