

# Forms Printer



For Dynamics GP

## User Guide

Documentation for the Installation,  
Administration, and Implementation of  
Forms Printer Base System  
Forms Printer for Project Accounting  
Forms Printer Plus  
Forms Printer for Web Client

# Contents

|                                                             |    |
|-------------------------------------------------------------|----|
| Copyright and Trademark Notice .....                        | 4  |
| Copyright.....                                              | 4  |
| Trademarks .....                                            | 4  |
| Contacting Us .....                                         | 5  |
| Technical Support .....                                     | 5  |
| Sales.....                                                  | 5  |
| Web Site.....                                               | 5  |
| Resource Center .....                                       | 5  |
| Mailing Address.....                                        | 5  |
| System Requirements .....                                   | 6  |
| Microsoft SQL Server Requirement .....                      | 6  |
| Report Tool Requirements .....                              | 6  |
| Understanding Forms Printer Modules .....                   | 7  |
| Forms Printer Base System .....                             | 7  |
| Form Printer Plus.....                                      | 7  |
| Forms Printer for Project Accounting .....                  | 7  |
| Forms Printer for Web Client .....                          | 7  |
| Summary.....                                                | 7  |
| Installation.....                                           | 8  |
| Overview .....                                              | 8  |
| Installation Checklist.....                                 | 8  |
| Installing the First Forms Printer Client Application ..... | 9  |
| Install SQL Server Objects .....                            | 10 |
| Install SQL Server Objects in Additional Companies.....     | 10 |



|                                                           |     |
|-----------------------------------------------------------|-----|
| Enter Forms Printer Registration Keys .....               | 11  |
| Installing Forms Printer on Additional Workstations ..... | 12  |
| Uninstalling Forms Printer .....                          | 13  |
| Configuration.....                                        | 14  |
| Overview .....                                            | 14  |
| Configuration Checklist.....                              | 14  |
| Adding Roles and Tasks.....                               | 15  |
| Enter Report Engine Setup Information.....                | 18  |
| Enter E-mail From Setup Information .....                 | 21  |
| Setup .....                                               | 24  |
| Forms Printer Base and Project .....                      | 24  |
| Forms Printer Plus .....                                  | 68  |
| Forms Printer for Web Client .....                        | 90  |
| Advanced Features.....                                    | 92  |
| Database Functions .....                                  | 92  |
| HTML Formatted E-mailing .....                            | 97  |
| Microsoft Dynamics GP Defaults File Settings.....         | 100 |
| Scripted E-mail To Addresses .....                        | 109 |
| Pre and Post Processing Stored Procedures.....            | 113 |
| Technical Support.....                                    | 120 |
| Troubleshooting Guide .....                               | 120 |
| Frequently Asked Questions .....                          | 124 |
| Project Accounting Report Mapping .....                   | 126 |

# Copyright and Trademark Notice

## Copyright

All material contained in this document is protected by copyright law.

©2018 Arpelligo, Inc. (dba Accountable Software) All Rights Reserved

## Trademarks

Forms Printer is a trademark of Arpelligo, Inc. (dba Accountable Software). Other company or product names mentioned may be trademarks or registered trademarks of their respective holders.

Microsoft Dynamics GP is a trademark of Microsoft Corporation in the United States and/or other countries.

Microsoft product screenshots reprinted with permission from Microsoft Corporation.



## Contacting Us

### 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](mailto: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.

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 billable unless the issue you are calling about is the 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 <https://www.accountable.com/Support/>.

### Sales

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

610.983.3100 option: 1 - [sales@accountable.com](mailto:sales@accountable.com)

### Web Site

Product downloads, documentation and videos can be found on our website: [www.accountable.com](http://www.accountable.com)

### Resource Center

From the Resource Center, you can access downloads, Renewals, Registration keys and support. Access to the Resource Center, our Partner and Customer portal, is available here: [www.accountable.com/login](http://www.accountable.com/login)

### Mailing Address

70 Buckwalter Rd., Suite 900, Royersford, PA 19468



## System Requirements

### Microsoft SQL Server Requirement

While Forms Printer works with Microsoft SQL Server 2005 or higher, the SQL Server version compatible will be determined by the version of Dynamics GP and the requirements of that version.

### Report Tool Requirements

Reporting Services 2005 or higher with Report Manager for SQL Reporting Services functionality

Crystal Reports Version 9.0 or higher



# Understanding Forms Printer Modules

## 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, 3<sup>rd</sup> 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. See [Forms Printer for Web Client](#) for details.

## Summary

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



# Installation

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.

## Overview

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. Include 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                          |   |

# 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 System Database, Enter Forms Printer Registration Keys, and Install SQL Server Objects in Additional Companies.

## Run the Installation

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

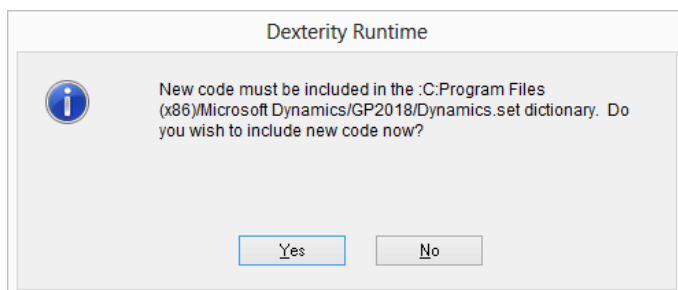
1. Download the Forms Printer Installation File
  - a. Download the latest version of Forms Printer. Checking our web site for the most current version of the product before installation ensures that any updates or fixes are installed and is highly recommended.
  - b. The file downloaded from the Accountable 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 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 after logging into Dynamics GP. 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.

## 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.



## 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.
2. 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.
3. Click the **Register** button to open the Forms Printer Registration window.
4. Enter the registration keys exactly as you received them from Accountable Software for your Microsoft Dynamics GP installation.
5. Registration keys are provided by Accountable Software directly. For more information or to obtain your registration keys, please log in to the My Account section of our web site at [www.accountable.com/login](http://www.accountable.com/login), call (610) 983-3100, or E-mail [sales@accountable.com](mailto:sales@accountable.com).
6. 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](mailto:techsupport@accountable.com).
7. Verify the Registration Keys.
8. If the module(s) you are registering appear with a checkbox in the **Registered** column, the registration was successful.
9. Click the **Close**.



## 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 Installation

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

1. Double Click on the **setup.msi** installer file to begin the installation.
2. 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 your 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 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 using the 'Run as Administrator' option (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, delete the ASI1655.dic Custom Reports Dictionary file. To remove the SQL Server objects, drop the tables from the GP System database and each of the company databases that begin with "ASI123" and "ASI124", and drop the stored procedures in the Microsoft Dynamics GP System and Company Databases that begin "zDP\_ASI123" and "zDP\_ASI124".

# Configuration

Once the installation of Forms Printer has been completed, the next step is to begin the configuration of Forms Printer Base and Forms Printer for Project and / or configure Forms Printer Plus.

## Overview

Once the installation of Forms Printer is complete, the next step is to configure the one-time settings required to begin use of Forms Printer. Whether Forms Printer Base or Forms Printer Plus will be used, the initial configuration steps must be completed. If using both Base and Plus, the configuration needs to be done only one time and can be done using either the Forms Printer Setup window or the Forms Printer Plus Setup window.

## Configuration Checklist

| Step | Description                                                                                                                                                                                                                                                                                                                                                                                                               | X |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| 1    | <a href="#">Add Roles and Tasks</a>                                                                                                                                                                                                                                                                                                                                                                                       |   |
| 2    | Navigate to the <a href="#">Forms Printer Setup</a> or <a href="#">Forms Printer Plus Setup</a> Window                                                                                                                                                                                                                                                                                                                    |   |
| 3    | <a href="#">Enter Report Engine Setup Information</a> <ul style="list-style-type: none"><li>• SQL Server Reporting Services Setup:<ul style="list-style-type: none"><li>○ Report Server URL: _____</li><li>○ Web Services URL: _____</li></ul></li><li>• Crystal Reports Setup:<ul style="list-style-type: none"><li>○ SQL User: _____</li><li>○ Password: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</li></ul></li></ul> |   |
| 4    | <a href="#">Enter E-mail From Setup Information</a><br><input type="checkbox"/> Default Outlook User<br><input type="checkbox"/> Exchange Address List<br><input type="checkbox"/> Manually Entered List<br>_____                                                                                                                                                                                                         |   |
| 5    | <a href="#">Add a new Report to Setup</a>                                                                                                                                                                                                                                                                                                                                                                                 |   |
|      | Choose Report Options:                                                                                                                                                                                                                                                                                                                                                                                                    |   |
|      | 1. <a href="#">Choose Report Tool</a>                                                                                                                                                                                                                                                                                                                                                                                     |   |
|      | 2. <a href="#">Select Report Path</a>                                                                                                                                                                                                                                                                                                                                                                                     |   |
|      | 3. <a href="#">Enter Delivery Options</a>                                                                                                                                                                                                                                                                                                                                                                                 |   |

## 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.

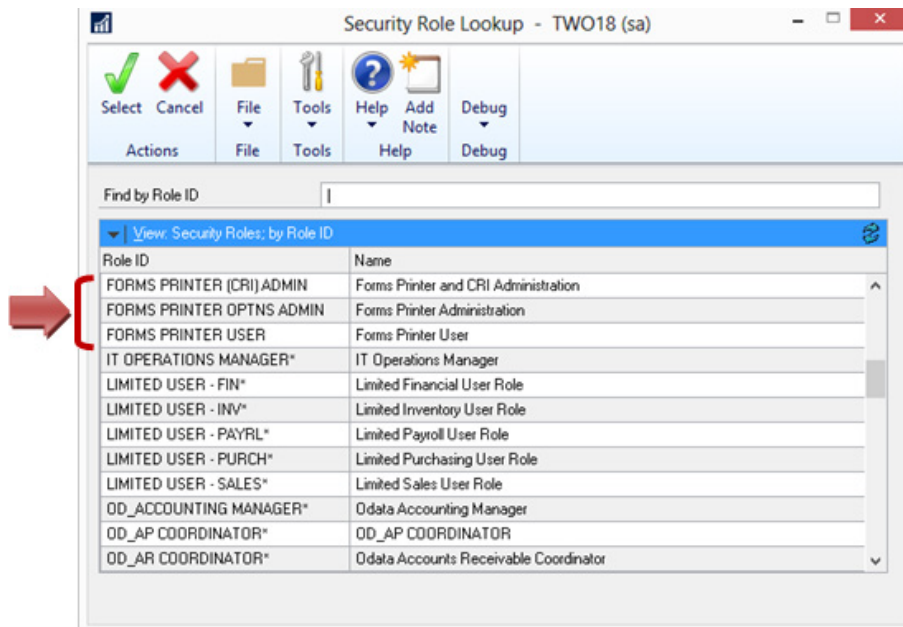
#### FORMS PRINTER OPTIONS ADM

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.

The screenshot below shows the Forms Printer Roles in the Security Role Lookup window:



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".

Below is a screenshot showing an 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:

Security Role Setup - TWO18 (sa)

Save Clear Delete Copy File Print Tools Help Add Note Debug

Actions File Tools Help Debug

Role ID: ORDER PROCESSOR\*

Role Name: Order Processor

Role Description: Tasks include verifying that there is sufficient inventory for an order, se

Display: All

☐ Display Selected Tasks

Mark All Unmark All

| Security Task ID                                    | Name                                          |
|-----------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> ADMIN_FIN_IF05*            | Interfund Management tables                   |
| <input checked="" type="checkbox"/> ADMIN_FP_CRI_01 | Set up Custom Report Integration              |
| <input checked="" type="checkbox"/> ADMIN_FP_CRI_02 | Set up Forms Printer Reports/Delivery Options |
| <input type="checkbox"/> ADMIN_FSS_005*             | Field Service Tables                          |
| <input type="checkbox"/> ADMIN_FSS_CA01*            | Set up Contract Admin                         |
| <input type="checkbox"/> ADMIN_FSS_CL01*            | Set up Service Call Mgmt                      |
| <input type="checkbox"/> ADMIN_FSS_DP01*            | Set up Depot Mgmt                             |
| <input type="checkbox"/> ADMIN_FSS_PV01*            | Set up Preventive Maintenance                 |
| <input type="checkbox"/> ADMIN_FSS_RT01*            | Set up Returns Mgmt                           |
| <input type="checkbox"/> ADMIN_INV_001*             | Set up Inventory                              |
| <input type="checkbox"/> ADMIN_INV_002*             | Set up item classes and currencies            |
| <input type="checkbox"/> ADMIN_INV_003*             | Set up lot categories                         |

Navigation: |< < > >|

## 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:

The screenshot shows the 'Security Task Setup - TWO18 (sa)' window. The 'Task ID' is 'ADMIN\_FP\_CRI\_01', 'Task Name' is 'Set up Custom Report Integration', and 'Task Description' is 'Set up CRI Settings for Crystal Report SQL Connections'. The 'Category' is 'Company'. The 'Product' is 'Custom Report Integration', 'Type' is 'Windows', 'Series' is 'Company', and 'User Type' is 'Full'. The 'Access List' is checked, and the 'Operations' list includes 'ASI SQL Utilities', 'ASI User Activity', 'Crystal Reports Setup' (checked), 'Crystal Test Window', and 'Sample CRI Integration'. The 'Print Operation Access' button is visible at the bottom.

Also: See the specific added window Operations under the ADMIN\_FP\_CRI\_01 Task ID for the System series.

The screenshot shows the 'Security Task Setup - TWO18 (sa)' window. The 'Task ID' is 'ADMIN\_FP\_CRI\_02', 'Task Name' is 'Set up Forms Printer Reports/Delivery Options', and 'Task Description' is 'Set up Company and Per-Master Record Settings for Forms Printer Reports'. The 'Category' is 'Company'. The 'Product' is 'Forms Printer', 'Type' is 'Windows', 'Series' is 'Company', and 'User Type' is 'Full'. The 'Access List' is checked, and the 'Operations' list includes 'Additional E Mail Address Setup' (checked), 'ASI SQL Utilities', 'ASI User Activity', 'Forms Printer Master Record Setup' (checked), 'Forms Printer Plus Setup', and 'Forms Printer Setup' (checked). The 'Print Operation Access' button is visible at the bottom.

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.

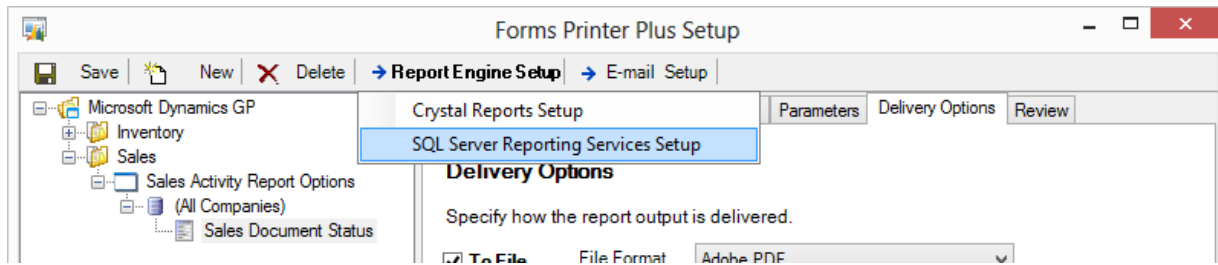
**Note:** You may use both the Crystal and SRS Reporting Engines with different reports setup to use either engine.

## 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                               |
|-----------------|-------------------------------------------|
| 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". The SQL Server user entered here can be placed in the GP SQL "DYNGRP" role or can separately be given Read Only access to the Databases which your Forms Printer report(s) will access.

The screenshot shows the 'Crystal Reports Setup - TWO18 (sa)' window. It features a menu bar with 'Save', 'File', 'Tools', 'Help', and 'Debug'. Below the menu bar, there is a section titled 'Crystal Reports requires a SQL login and password.' followed by the instruction 'Manually enter a SQL login and password'. A text box contains the message 'The SQL password entered here MUST have been set using SQL management tools.' Below this, there are three input fields: 'SQL User Name' with the value 'FormsPrinter', 'SQL Password' with masked characters (dots), and 'Verify Password' which is currently empty.

## 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 SSRS or any files required to run an SSRS installation.

### Window Buttons

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

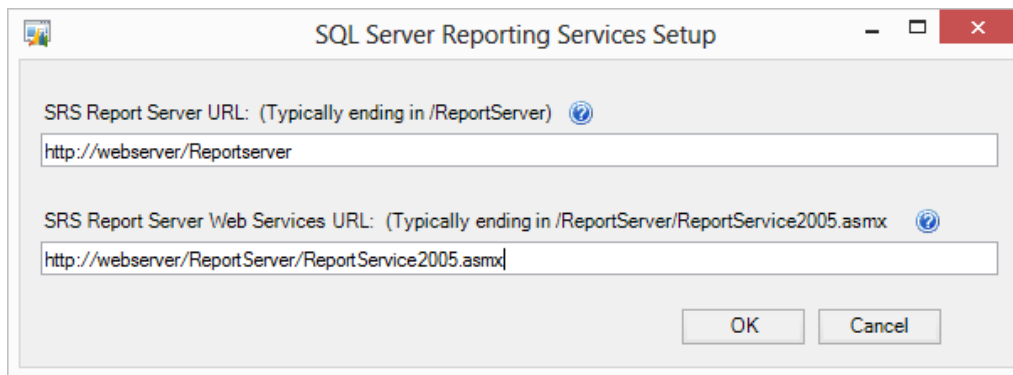
| Buttons | Description                                                               |
|---------|---------------------------------------------------------------------------|
| OK      | Saves the current entry values and closes the Window.                     |
| Cancel  | Closes the window without 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 SSRS Report Server Web Services URL typically would begin with the same value as the SSRS Report Server URL and it must end with either “ReportService2005.asmx” no matter which version of SSRS you are using unless you have a SharePoint integrated version, in which case it should end with “ReportService2006.asmx”.

## Enter E-mail From Setup Information

Before you can setup Forms Printer's E-mail delivery, you must complete the E-mail From Setup. That is, the list of potential E-mail addresses your E-mails would come from. For example, you might want the E-mail 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 in the case where you want E-mails 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 From Setup menu option opens the **E-mail From Setup** window.

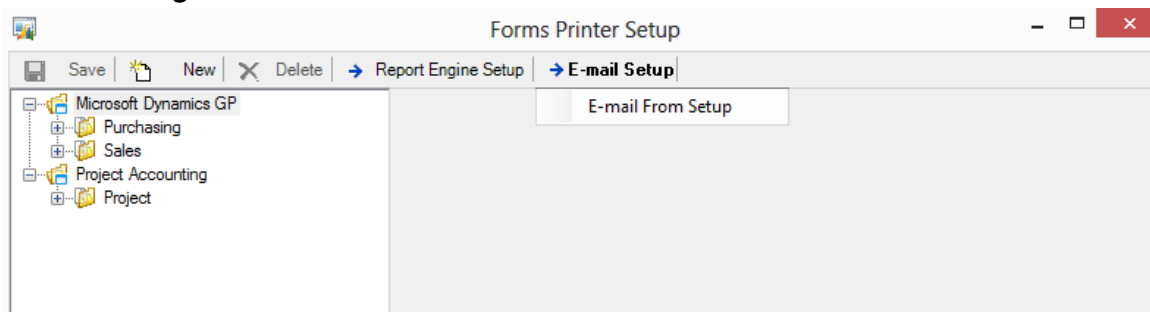
## E-mail From Setup Window

Use this window to determine the list of "From" addresses available in the E-mail 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.

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. Then click the E-mail Setup button to open the E-mail Setup window.

## Window Navigation



## 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 E-mail "From" Choices | Radio Group displaying radio button options                                     |
| Default Outlook User Radio Button   | Always use the current Outlook profile as the E-mail From Address.              |
| Exchange Address List Radio Button  | Retrieve a list of E-mail 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 E-mail 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 E-mail values from which you will select your From Addresses. |

## Window Example

The screenshot below shows the **E-mail From Setup** window.

## E-mail “From” Setup Options

On the window, select the “From” choice for the source of your E-mail From List. This setting is then applied to all workstations. The options are:

### Default Outlook User

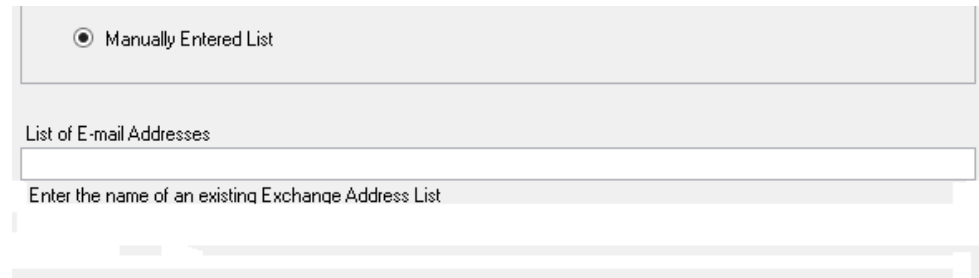
With this option selected, the E-mail From dropdown list will display “Default Outlook User” as the only choice and all E-mails will be sent from the current user’s Outlook Profile, if set up.

### 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:

### 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 E-mail Address values which will be displayed as the 'From' E-mail choices during E-mail Delivery Setup. An example list is shown below:



The screenshot shows a software configuration window. At the top, there is a tab labeled "Manually Entered List" with a radio button icon. Below this tab, the text "List of E-mail Addresses" is displayed above a large, empty text input field. Underneath the input field, there is a smaller text box containing the placeholder text "Enter the name of an existing Exchange Address List". The interface has a light gray background with standard Windows-style window controls and borders.

# Setup

## Forms Printer Base and Project

Once the installation of Forms Printer has been completed, the next step is to begin the setup of Forms Printer Base System and / or Forms Printer Plus.

### Overview

Once the Configuration 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. Following the steps in this guide you will choose the Report Tool, select a report and define the options to control the delivery of the report to file, printer and E-mail.

## Forms Printer Setup Window

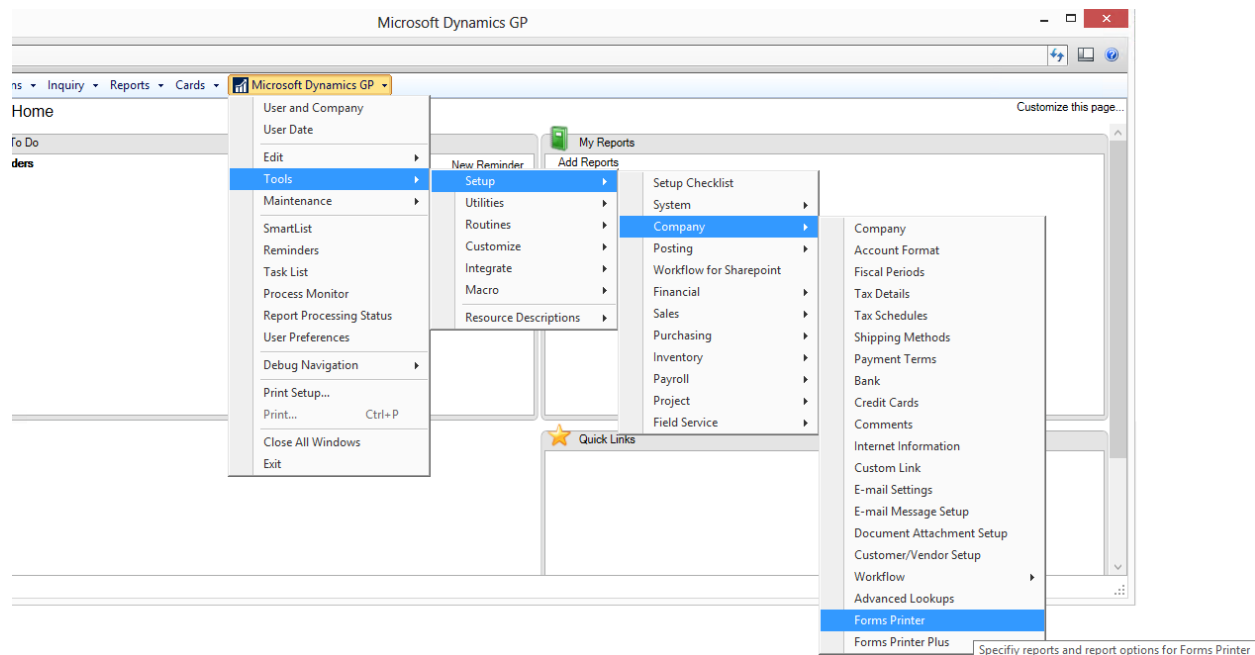
The Forms Printer setup window is used to include the reports and define the options Forms Printer will use when replacing Report Writer Reports in Dynamics GP.

### 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.



### 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.                                                 |
| E-Mail Setup        | Opens the E-mail Setup window                                                                                                             |

## Window Fields and Controls

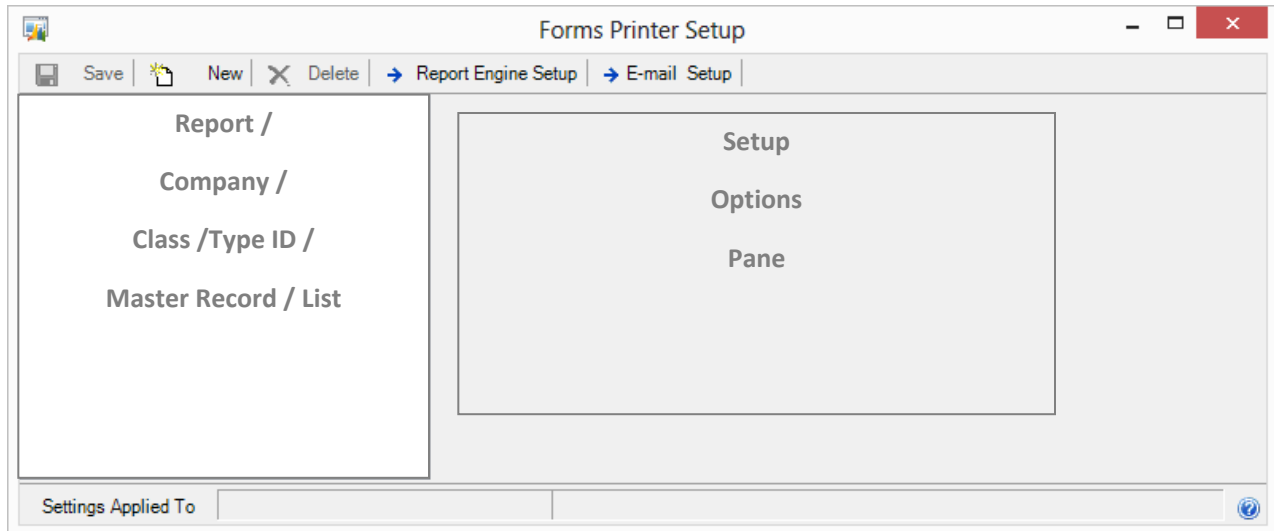
| Fields                                                                  | Description                                                                                                                                                                             |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.                |
| Setup Options Pane                                                      | This editable page is used to determine the various settings for the record selected in the treeview.                                                                                   |
| Report Tool                                                             | This dropdown list is used to select the Reporting engine desired for the selected Report or Company.                                                                                   |
| Report Path                                                             | If using Crystal Reports this field and                                                                                                                                                 |
| Report Path Lookup                                                      | This button is used to browse for, and select report mapped to the selected GP Form.                                                                                                    |
| To File                                                                 | Checkbox to have the report exported to a file when Delivered.                                                                                                                          |
| File Format                                                             | The File Format selection determines the format for the exported document. See the <a href="#">Report Formats</a> section for details.                                                  |
| Folder                                                                  | This text field shows the directory in which Forms Printer will create the exported file.                                                                                               |
| Folder Lookup                                                           | This button is used to browse for, and select the To File export folder.                                                                                                                |
| Select File Name Button                                                 | This button opens the Select File Name window.                                                                                                                                          |
| To Printer                                                              | Selecting the To Printer checkbox enables the Delivery System printer output.                                                                                                           |
| Printer Selection                                                       | This Dropdown displays a list of options for printer selection or print behavior.                                                                                                       |
| Printer Display                                                         | 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                                                         | This entry field is hidden by default and is displayed when a choice other than Specific Printer is selected in the Printer Selection Dropdown.                                         |
| To E-mail                                                               | Selecting the To E-mail checkbox, allows delivery of the selected document by E-mail.                                                                                                   |
| Using Outlook                                                           | This radio button indicates that the installed, local, Outlook client will be used to deliver the document by E-mail.                                                                   |
| Using Crystal MAPI                                                      | This radio button, enabled only when the Report Tool is Crystal Reports, indicates that Crystal's internal MAPI E-mailing functionality will be used to deliver the document by E-mail. |
| E-mail From                                                             | This dropdown, populated by the E-mail Setup choice and enabled only if Microsoft Outlook is installed, shows the E-mail addresses available to select as the E-mail From Address.      |
| E-mail To Source                                                        | This dropdown list allows selection of the Master Record Address Source from which Forms Printer will retrieve the E-mail To Address.                                                   |
| E-mail To                                                               | This dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the E-mail To Address.                                                         |
| Additional E-mail To Addresses                                          | This link opens the Additional E-mail Addresses Setup window allowing the setup of additional E-mail recipients. The link will be displayed in red when a script has been entered.      |
| Scripted E-mail to Addresses                                            | This link opens the Scripted E-mail List window allowing entry of a SQL script which returns a custom list of Mail To, CC and / or Bcc E-mail                                           |

|                               |                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | Addresses for E-mail 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.                                                                                                                                                                                                                         |
| Send Option                   | This dropdown list allows the selection of the destination for the created E-mail.                                                                                                                                                                                                                                                                     |
| Hours To Delay                | This entry field is enabled when the Send Option dropdown list is set to Save to Outlook Outbox Delayed allowing the delivered E-mail to be sent at a time in the future.                                                                                                                                                                              |
| If No E-mail Address          | This dropdown allows you to define the default behavior to follow when the Master Record does not have a defined E-mail address in the field(s) defined by the E-mail To setup.                                                                                                                                                                        |
| Printer                       | This read only field displays the selected Printer when the If No E-mail Address selection is set to Specific Printer.                                                                                                                                                                                                                                 |
| Printer Setup Button          | This button is used to choose Print options when the If No E-mail Address selection is set to Specific Printer.                                                                                                                                                                                                                                        |
| Multiple Documents per E-mail | This checkbox creates a single E-mail for each unique E-mail To address in a batch or range, and attaches all documents for that contact to each E-mail.                                                                                                                                                                                               |
| Additional Attachments        | This link opens the Include Additional Attachments window where files, including those attached in the GP Attachments Setup, can be chosen as attachments to the E-mail in addition to the Dynamics GP transaction. The link will be displayed in red when attachments have been added. See <a href="#">Additional Attachments window</a> for details. |
| Attachment Format             | This dropdown list allows you to specify the file format for the document as an E-mail attachment.                                                                                                                                                                                                                                                     |
| Attachment Name               | This text field allows the entering of the E-mail attachment name.                                                                                                                                                                                                                                                                                     |
| Editor Button                 | This button opens the Subject and Attachment Name Editor window where the E-mail Attachment Name can be defined to include text and tokens from fields related to the document. See <a href="#">Subject and Attachment Name Editor window</a> for details.                                                                                             |
| Message & Subject             | This radio group allows for the selection of the setup source that will be used for the E-mail Subject and E-mail message body.                                                                                                                                                                                                                        |
| Message ID                    | This field displays the Message ID to be used when E-mailing the selected document type.                                                                                                                                                                                                                                                               |
| Message ID Lookup Button      | This button opens the E-mail Messages lookup window. See E-mail Messages window for details.                                                                                                                                                                                                                                                           |
| Editor Button                 | This button opens the Message Editor window. See <a href="#">Message Editor window</a> for details.                                                                                                                                                                                                                                                    |
| Message Description           | This read only field displays the Message Description of the selected Message ID.                                                                                                                                                                                                                                                                      |
| Subject                       | This field is used to enter the text as it will appear in the E-mail Subject line.                                                                                                                                                                                                                                                                     |
| Editor Button                 | This button opens the Subject and Attachment Name Editor window where the E-mail Subject can be defined to include text and tokens from fields related to the document. See <a href="#">Subject and Attachment Name Editor window</a> for details.                                                                                                     |

## 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.



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

### Include New Report Steps

1. Click the **New** button from the control area.
2. Select **Include New Report** from the dropdown menu.
3. From the Include New Report window, select a **Product**.
4. The Product is the Dynamics GP module or 3<sup>rd</sup> 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**.

### Include New Report Window

#### Window Buttons

The buttons on the Window include:

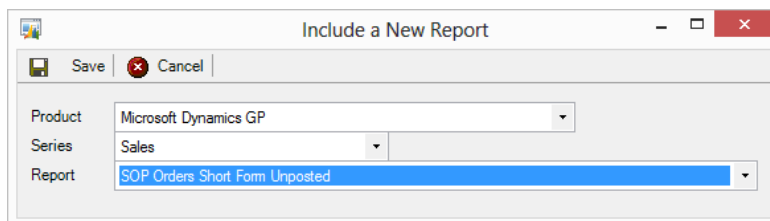
| Buttons | Description                                                                                            |
|---------|--------------------------------------------------------------------------------------------------------|
| Save    | Saves the current entry values, closes the Window and adds the selected report to Forms Printer Setup. |
| Cancel  | Closes the window without saving changes or returning the selected report.                             |

#### Window Fields

| Fields  | Description                                                                                                                                   |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Product | This dropdown lists the products loaded in the current user's Dynamics GP System                                                              |
| Series  | This dropdown shows the available Series list for the selected Product.                                                                       |
| Report  | This dropdown includes the available reports in the selected product and Series. Note that reports already added to setup will not be listed. |

#### Window Example

The screenshot below shows the Include a New Report window.



## Entering Basic Setup Options

For each of the records added to the Report / Company / SOP Document Type ID / Class ID / Master Record list, the Setup Options Pane 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".

### Setup Options Pane 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 Setup options Pane.

The screenshot displays the 'Forms Printer Setup' window. On the left is a tree view of the 'Report / Company / SOP Document Type ID / Class ID / Master Record list'. The right pane, titled 'Setup Options', contains the following settings:

- Report Tool:** SQL Reporting Services
- Report Path:** /GP2018/SOP Unposted - All SOP Types
- Deliver This Report Using the Options:**
  - ☒ **To File:** Adobe PDF, Folder: C:\Users\User\Documents
  - ☐ **To Printer:** Specific Printer
  - ☒ **To E-mail:** Using Outlook (selected over Using Crystal MAPI)
- E-mail From:** Default Outlook User
- E-mail To Source:** Internet Information User Defined E-mail Field
- E-mail To:** Document Ship To
- Replies Sent To:** sales@accountable.com
- Send Option:** Save to Drafts Folder
- If No E-mail Address:** Save to Drafts Folder
- ☒ **Multiple Document Attachments per E-mail:** Additional Attachments
- Attachment Format:** Adobe PDF
- Attachment Name:** Invoice {<RF>'SOP Number' of table SOP\_HDR\_WORK.0}
- Message & Subject:** From Forms Printer (selected over From Dynamics GP)
- Message ID:** HTML INVOICE
- Message Description:** Example HTML Formatted Invoice Email
- Subject:** New Sales Invoice

At the bottom, 'Settings Applied To' is set to 'Customer' and the specific entry is 'Baker's Emporium Inc. - BAKERSEM0001'.

### Report Tool

Use the Report Tool dropdown to select from the available report designer tools integrated with Forms Printer. Those include Report Writer, Crystal Reports, and SQL Server Reporting Services. When selecting SSRS or Crystal, the [Report Engine setup](#) for that tool must be completed.



## Report Writer

Report Writer is the default Report Tool setting for a newly added report. With this setting chosen, Forms Printer then enables the To Printer checkbox. With the 'To Printer' checkbox unselected, Forms Printer does not attempt to control the report. To use Forms Printer's To Printer setting, mark the checkbox and select a printer.

**Note:** At the report level, you can leave Report Writer as the selected Report Tool while still allowing added Company level settings to use either SSRS or Crystal Reports. This would mean that Forms Printer is used to control printing for only specified companies added beneath the report.

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. If To Printer is unchecked, the Printer Selection will be cleared when the setup is saved.
3. ... and To Printer is unchecked, 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.

## Crystal Reports

With Crystal Reports selected, the Report Path field and lookup are enabled, allowing you to enter or browse to the desired rpt file.

## SQL Reporting Services

With SQL Reporting Services the Report Path field can be used to enter the desired published Report from Reporting Services. The Report Lookup is used to select the desired Report from the Select Report window.

## Report Path

The Report Path Lookup is used to display the report selected from the file selection window opened by the Report Lookup button. Note that the report path and name can be manually entered in the Report Path field.



### Report Lookup

When using Crystal Reports as the report Tool, this button opens the file selection window. When using SSRS, this lookup is used to select the published Report from the Select Report window of Reporting Services.

## Entering Delivery Options

Once the Report and report path have been selected and saved, the chosen report and format are now ready to be printed by Forms Printer. Optionally, additional Delivery options can also be defined for controlling Forms Printer's To File, To Printer and To E-mail Delivery.

### To File

Mark the To File checkbox to have the report exported to a file each time the selected report format is delivered. To complete this delivery option, a File Format and file path are selected.

### File Format

The File Format selection determines the format for the exported document. See the [Report Formats](#) section for details.

### Folder

The folder field displays the export path the report will be exported to when Delivered. When selecting the To File option, there are two methods for determining both the path AND the resulting Export File Name. Those are either using the Folder Lookup button or the Select File Name button.

### Folder Lookup Button

The folder lookup button is used to choose ONLY the path and folder the report will be exported to when Delivered. This is the path to the directory and does not include the file name. If this method is used, Forms Printer automatically names the file to ensure a unique file name is created during each export. See [Understanding File and Folder Naming Rules and Conventions](#) for details.

### \*Understanding To File Naming Rules and Conventions

When delivering to file with Forms Printer, part of the setup is to choose the folder location to which the file will be exported. This is done by using the Folder Lookup button where only the folder is chosen. No file name is specified. In this case, Forms Printer will create the file name at the time of export using the following rules:

1. When printing single documents, the file is named with the convention:

DocumentType<sp>DocumentNumber<sp>SystemDate<sp>SystemTime<.>extension

For Example, sales order number "ORD0001", might export as:

Order ORD0001 06-25-27 8 30 27AM.PDF

2. When printing batches or ranges of documents, the file is named with the convention:

DocumentType<sp>FirstDocNumber<sp>to<sp>LastDocNumber<sp>SystemDate<sp>SystemTime<.>extension

For Example a batch with sales orders "ORD01" to "ORD05" might be exported as:

Order ORD01 to ORD05 06-25-01 8 30 27AM.PDF

**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.

3. The exception to this convention is Statements. Because Statements do not have a document number, the naming convention is:



DocumentType<sp>CustomerNumber<sp>  
(or FirstCustomerNumber<sp>to<sp>LastCustomerNumber)SystemDate<sp>  
System Time<.>extension

### Select File Name Button

The Select File Name button opens the [Select File Name window](#) which 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.

### \*Understanding To File Folder Behavior

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

1. If the created file path and name do not contain a period "." after the last backslash "\", Forms Printer assumes you are trying to define only a file path and NOT a path and name. It will look for the entered value as a path.

For example, if we intended to create pdf files with the name "MyFile", in a folder called "Reports" on drive "X", we would enter:

X:\Reports\MyFile.pdf

If, instead, let's examine the behavior if we left off the file extension, entering only:

X:\Reports\MyFile

Forms Printer would evaluate "MyFile" as a subfolder of the "Reports" folder on drive "X". If a folder with the name "MyFile" was not found, the export to file would fail. If the defined folder is found, Forms Printer will create export file using the naming convention detailed in [Understanding File and Folder Naming Rules](#).

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

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 Vendor ID as its name and if found, will create export file using the naming convention detailed in [Understanding File and Folder Naming Rules](#).

X:\Reports\{'Vendor ID' of table POP\_PO,0}\

In this example, the entire folder path and file name are defined so a pdf file named for the PO Number would be created in the "Reports" folder on the "X" drive:

X:\Reports\{'PO Number' of table POP\_PO,0}.pdf



4. The file extension defined must match the extension selected in the File Format dropdown on the Forms Printer Setup window. If they do not match, the name of the file will be as specified in the Select File Name window but that actual file format will be that of the File Format dropdown selection.
5. If a duplicate file name is created as a result of exporting to file, Forms Printer will overwrite the existing file WITHOUT WARNING.

### To Printer

Selecting the To Printer checkbox enables the Delivery System printer output. By default, this option is checked when a new report is added. When marked, this option will send a copy of the report to 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.

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 print options 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.

### Printer Selection

This dropdown 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 Display

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



## Printer Setup Button

This button is enabled when Specific Printer is chosen for the Printer Selection Dropdown. The button opens the Print dialog where a printer and settings can be defined.

## Copies To Print

The Copies To Print field is hidden by default. It is displayed when the Printer Selection dropdown is set to a selection other than Specific Printer. The 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 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.

During E-mail setup, it may be helpful to consider Forms Printer many advanced features related to E-mailing including:

- [HTML Formatted E-mail Body](#) – create an HTML Formatted E-mail body with colors, images, etc.
- [Database Functions](#) – write custom SQL Functions to return content for E-mails and File Exporting
- [Scripted E-mail Addresses](#) – custom SQL Selects to retrieve E-mail Addresses using custom rules

## Using Outlook

Forms Printer will automatically detect whether Microsoft Outlook is installed, and enable or disable the Microsoft Outlook Radio button and E-mail options available for use with Outlook E-mailing.

**Note:** If using SSRS as the Report Tool, only Using 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 'E-mail 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 E-mail will be sent automatically to the recipient.

#### E-mail From

The E-mail From dropdown list is populated based on the selection made when choosing the To E-mail option. The E-mail From dropdown list will only be enabled if Microsoft Outlook is installed.

From the dropdown, you have the option to use the Default Outlook User or specify a specific E-mail Address to use as the Send On Behalf Of E-mail From Address. If using an E-mail Address other than the 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 E-mail application loaded. The full version of Microsoft Outlook is currently the only supported MAPI client According to the Crystal /Business Objects/SAP web site.

To have access to all of Forms Printer's E-mailing functionality, it is recommended to use Microsoft Outlook 2000 or Greater.

#### E-mail To Source

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. The choices are:

- 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 E-mail To address for the selected entry.

## Additional E-mail To Addresses

The Additional Addresses link opens the Additional Addresses Setup window. This link will be displayed in red when additional addresses have been entered.

## Additional Addresses Setup Window

This window allows you to define addresses to mail to, other than the primary address selected in the E-mail To dropdown list. The screenshot below shows this window.

| Mail Address Type | Required                            | Use E Mail Address Of |
|-------------------|-------------------------------------|-----------------------|
| Mail To Address   | <input checked="" type="checkbox"/> | Document Bill To      |
| CC Address        | <input checked="" type="checkbox"/> | Document Ship To      |
| BCC Address       | <input checked="" type="checkbox"/> | 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 E-mail To, Cc, or Bcc list of the E-mail.

## Required

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

## Use E-mail Address Of

The 'E-mail Address Of' dropdown list allows you to select the Master Record Address from which Forms Printer will retrieve the additional E-mail Address. This E-mail address is stored per Master Record, per

Address, in the Internet Information window. The Master record is either the Customer or Vendor for which the document was created, depending on the document type being printed.

#### E-mail CC List

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

#### E-mail BCC List

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

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

#### Scripted E-mail To Addresses

The Scripted Mail to Addresses button opens the [Scripted E-mail List window](#). This window allows you to manually add a SQL script which returns a custom list of Mail To, CC and / or Bcc E-mail Addresses for E-mail delivery. See [Scripted E-mail To Addresses](#) in the [Advanced Features](#) section for details.

#### 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:** For the Reply To functionality to work properly, the E-mail must be sent to an E-mail address outside of the Exchange domain sending the E-mail.

#### Send Option

The Send Option dropdown list allows you to select the destination for the created E-mail. The selections for Send Options are:

##### Send Directly to E-mail Recipient

Automatically sends the E-mail.

##### Save To Outlook Drafts folder

Creates the E-mail in the Drafts folder. E-mail must be sent manually.

##### Save to Outlook Outbox

Creates the E-mail and saves it to the Outbox. E-mail must be sent manually.

##### Save to Outlook Outbox Delayed

Creates the E-mail and saves it to the Outbox. E-mail will be sent automatically at the specified time selected by the Hours to Delay option.

##### Hours To Delay

The Hours to delay option is enabled when the Send Option dropdown list is set to 'Save to Outlook Outbox Delayed'. Setting this number adds the specified number of hours to the current system time, and uses that to set the E-mail's delayed send property. For example, if the E-mail was created at 10:15 AM, and the Send option was set to Save To Outlook Outbox delayed, with an Hours To Delay setting of 12, the E-mail would be created in the Outbox, and would stay there until 10:15 PM, and then it would be E-mailed to the selected Recipients.



### Display Created E-mail

Creates the E-mail displays the E-mail rather than sending or saving it. Once any required modifications are made, the E-mail can be modified and then saved or sent manually.

### Reply To Selected E-mail

By default, Forms Printer will prompt the user notifying them that the Reply To Selected E-mail is about to run, giving the user a chance to select the E-mail they wish to reply to. After clicking Ok on the dialog, the document and E-mail body, as defined in Forms Printer Setup, will be attached as a reply to the user's selected E-mail.

### \*Important points to understand when using the Reply To Selected E-mail feature:

1. The user must select an E-mail Item. A message will be generated if the selected Item is not an E-mail which can be replied to giving the user one additional chance to select the correct Reply To E-mail Item.
2. The feature is disabled when E-mailing a batch or range of documents. The documents will be created as defined in Setup but will be saved to the Drafts folder as new E-mails in the case of batch or range E-mailing.
3. The feature will work whether the user has already clicked Reply or not.
4. The feature works when using the Inline Reply or the Pop Out reply.
5. This feature ALWAYS uses the Reply All option when replying to the selected E-mail.
6. The dialog notifying the user to select the Reply To E-mail can be disabled in the Dex.ini. See [ASIOUTLOOKREPLYPRESELECT](#) for more details on this setting.

### If No E-mail Address

This dropdown determines the default behavior Forms Printer follows when the Master Record does not have an E-mail address in the field(s) defined by the E-mail To selection. The If No E-mail Address choices are:

#### Save to Drafts Folder

Using this option, Forms Printer will create the E-mail including the Subject, Body and attachment(s). The created E-mail will then be saved to the sending user's Drafts folder.

#### Print Using Default Printer

Using this option, instead of sending the transaction to E-mail, Forms Printer will print the document using the printing user's default printer.

#### Specific Printer

Using this option, instead of sending the transaction to E-mail, Forms Printer will print the document using the Printer

##### Printer

This read only field displays the printer selected using the Printer Setup button when If No E-mail Address is set to Specific Printer.

### Printer Setup Button

This setup button opens the Print dialog where a printer and properties can be selected for the Printer setup when If No E-mail Address is set to Specific Printer.

### Multiple Document Attachments per E-mail

When printing a batch or range of SOP, POP, or RM documents with Forms Printer, this checkbox indicates to Forms Printer to look at each transaction in the Batch or Range, look at the Forms Printer Setup Delivery Options, each transaction's intended E-mail To recipient, and then create a single E-mail for each unique E-mail To address. All of the documents for that E-mail To recipient are added as attachments to that single E-mail.

### Additional Attachments

The Additional Attachments link opens the Include Additional Attachments window where files other than the transaction can be configured for inclusion on the created E-mail.

### Include Additional Attachments Window

The Additional Attachments window allows files to be selected for attachment to the E-mail 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 E-mail is created Forms Printer will fill in any parameters using data associated with the document being E-mailed, retrieve the file from the file system and attach it to the E-mail along with the Dynamics GP document before completing the defined delivery.

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

### Window Buttons

| Buttons | Description                                                                           |
|---------|---------------------------------------------------------------------------------------|
| Save    | This button saves any changes made and closes the Additional Attachments window.      |
| Cancel  | This button closes the Additional Attachments window without saving any changes made. |

### Window Fields and Controls

| Fields                        | Description                                                                                                            |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Include GP E-mail Attachments | This checkbox instructs Forms Printer to use the GP Attachments if present.                                            |
| Add                           | This button opens the Select File Name window where files and paths containing report fields can be built or selected. |
| Edit                          | This button opens the Attachment Path and File Name window.                                                            |
| Delete                        | This button removes the highlighted file from the list of attached documents.                                          |
| File List                     | This list field displays the included attachments.                                                                     |

### Window Example

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



### 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 E-mail 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 Select File Name window where files and paths containing report fields can be built or selected. The Select File Name window is used 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 one or more parameters.

See [Select File Name window](#) for details.

**Note:** Tokens 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 replace the tag with the correct information. The tokens shown in the path will be replaced with the actual value of the fields when the E-mail is created. The text of these tokens should not be altered in any way.

### 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, changes to the file name and path can be made by making manual changes or by selecting a new file.

### Delete

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

### File List

The File List field displays each of the files that will be included as attachments to the E-mail when delivered.

### Attachment Format

The Attachment Format dropdown list displays the available file formats that can be created by the selected [Report Tool](#). See [Report Formats](#) for a list of file format types for each Report Tool.

### Attachment Name

The Attachment Name field is used to enter text that will be used as the file attachment name in the E-mail created by Forms Printer. To create a calculated Attachment Name, use the Attachment Name Editor.

**Note:** When creating an attachment name, the following characters should be avoided, as they are invalid in the name of a file: \ / ? \* : " < > |

### Attachment Name Editor Button

The Attachment Name Editor button opens the [Subject and Attachment Name Editor window](#) where a calculated attachment name can be created using a combination of entered text and tokens.

## Message and Subject

The Message and Subject radio group allow for the selection of the Subject and Message Source, using either settings already defined in Dynamics GP or

The Message and Subject choices are:

### From Forms Printer

This selection allows for the selection and setup of the E-mail message and Subject using the options chosen in the Forms Printer Setup window.

### From Dynamics GP

This selection disables the Message ID and Subject fields in Forms Printer Setup. This indicates that Forms Printer will retrieve the E-mail Message and Subject from the matching Document Type Setup defined in the Dynamics GP Message Setup window (opened from Microsoft Dynamics GP > Tools > Setup > Company > E-mail Message Setup) and mapped in the Dynamics GP Sales E-mail Setup, Purchasing E-mail Setup, Customer E-mail Options, and Vendor E-mail Options windows. Forms Printer uses the same methodology as GP for selecting the Message ID which determines the Body and Subject of the E-mail, looking first to the Customer or Vendor and then defaulting to the per document setup if no per Master ID option is defined.

**Note:** Forms Printer does not use other Dynamics GP settings (Embed Document in Message Body, Attachment Options, and File Attachment Format) even when using the From Dynamics GP Message and Subject setting.

To use the Dynamics GP feature E-mail Address based on Doc Type if Forms Printer, see [E-mail To Source](#).

## Message ID

The Message ID field shows the selected ID value of the selected E-mail Message.

### Message ID Lookup

The Message ID Lookup button opens the E-mail Messages window. An example of the E-mail Messages window is shown below.

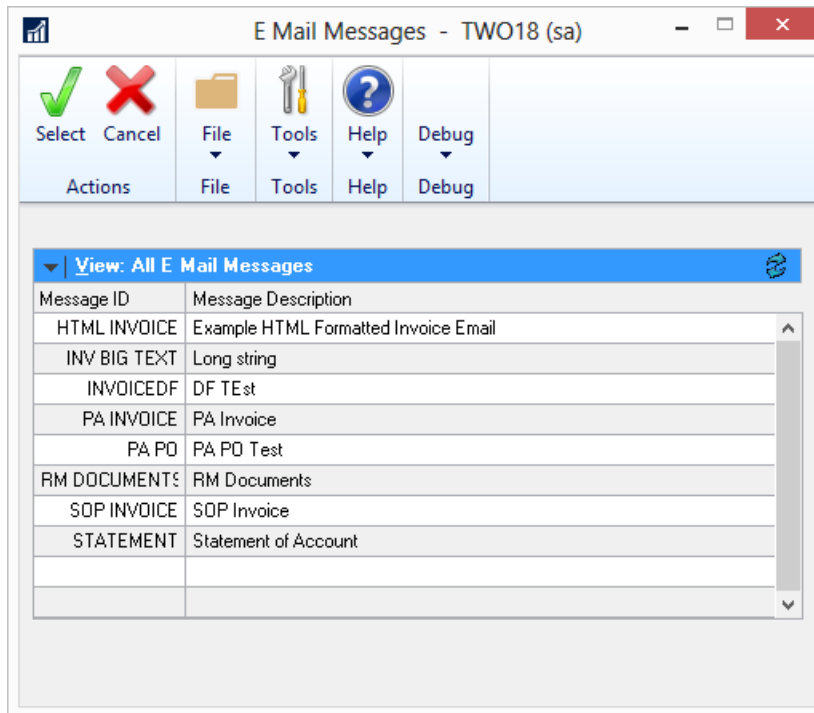
### E-mail Messages Window

The E-mail Messages window lists the Messages created and saved using the Message Editor window. Use this window to select a Message ID to return to Setup.

### Window Example

A screenshot of the E-mail Messages window is below.





#### Message ID Editor Button

The Message ID Editor button opens the Message Editor window where new Messages can be created, and existing messages can be modified or deleted. See [Message Editor window](#) for details.

#### Message Description

The read only Message Description field displays the description of the selected Message.

#### Subject

The Subject field is used to display and enter a string that will be used as the E-mail subject when Forms Printer delivers by E-mail.

#### Subject Editor Button

The Subject Editor button opens the Subject and Attachment Name Editor window. See [Subject and Attachment Name Editor window](#) for details.

## Shared Windows and Lookups

Several windows, lookups and selections are referenced from multiple locations in Forms Printer. Those resources are detailed below. Links to these resources are found throughout the documentation, in-line with the description of the functionality or feature using them.

### Database Function Lookup

The Database Function lookup is used to select a SQL User-Defined Function for use as part of the Forms Printer Delivery Options. The window can be opened from the [To File Name](#), [Scripted E-mail List](#), [Subject and Attachment Name Editor](#), and [Message Editor](#) windows.

The use of Database Functions is described in detail in the [Advanced Features](#), [Database Functions](#) section of this User Guide.

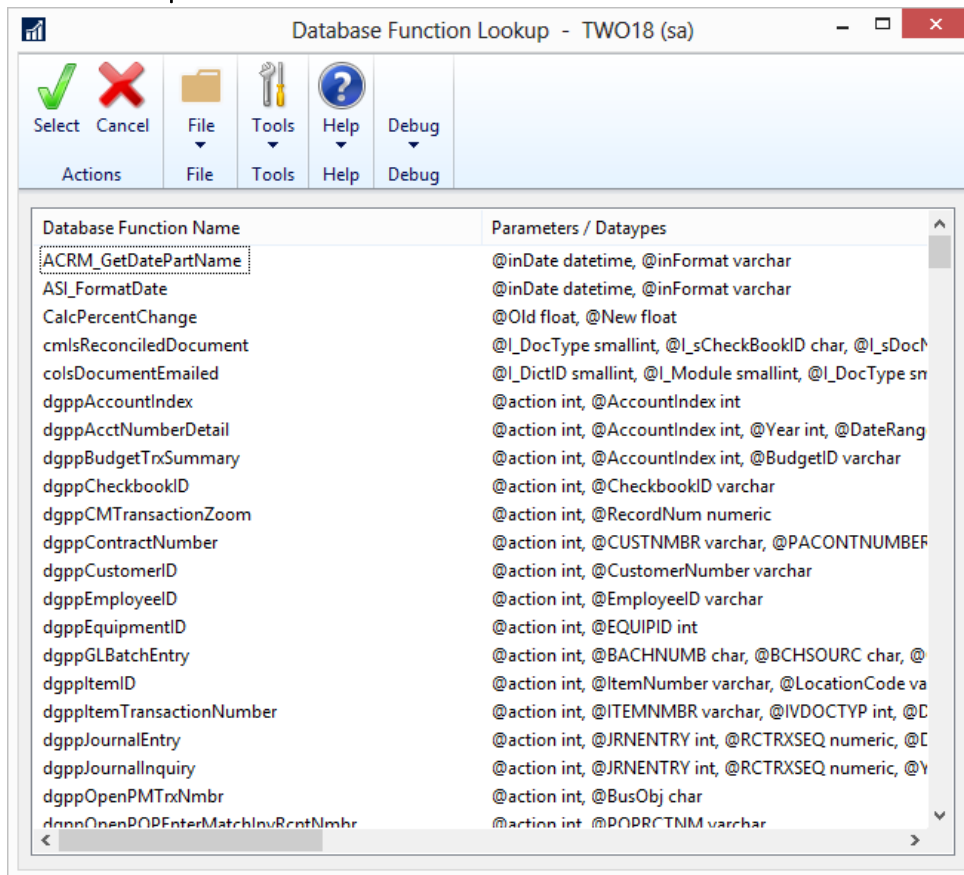
### Window Buttons

| Buttons | Description                                                                                                                               |
|---------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Select  | Returns the selected Database Function to the window that it was opened from and closes the Database Function Lookup window.              |
| Cancel  | Closes the Database Function Lookup window and returns to the window that it was opened from without returning a Database Function value. |

### Window Fields and Controls

| Fields                 | Description                                                                                   |
|------------------------|-----------------------------------------------------------------------------------------------|
| Database Function Name | Displays a list of Scalar, SQL User-Defined Functions from the current Company Database.      |
| Parameters / Datatypes | Displays the name and datatype of the parameter(s) required by the SQL User-Defined Function. |

## Window Example



## Message Editor

The Message Editor Window is used to create the body for E-mails to be delivered by Forms Printer. The created messages are saved with an ID and Description and can be applied to multiple documents in Forms Printer Setup.

The message text can be manually entered, or it can be a combination of manually entered text and tokens added using the Select Form Fields, Select System Fields, and Select Global Fields lists.

More advanced options for creating the E-mail Message include:

- [Database Functions](#) – write custom SQL Functions to return parts of, or all of the E-mail body.
- [HTML Formatted E-mail Body](#) – create an HTML Formatted E-mail body with colors, images, etc.

When the message is created and assigned to a particular document, Forms Printer will fill in any parameters using data associated with the document being E-mailed.

## Window Buttons

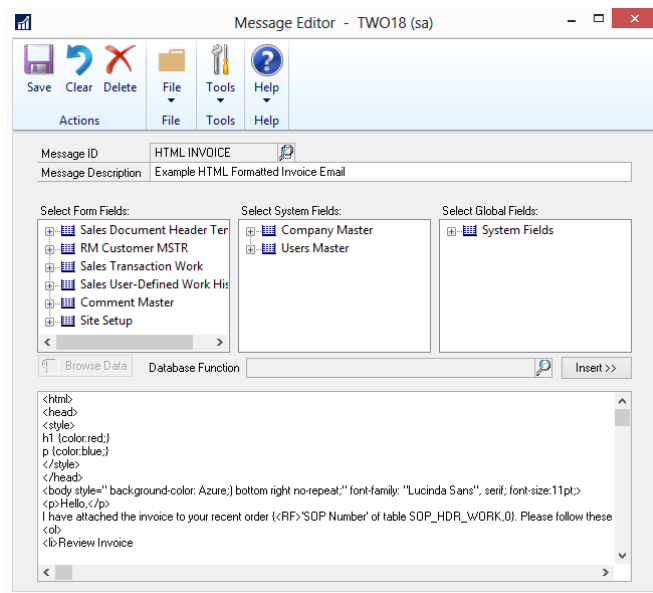
| Buttons | Description                                                                 |
|---------|-----------------------------------------------------------------------------|
| Save    | Saves any changes made to the Message and closes the Message Editor window. |
| Clear   | Removes all contents in the Message field.                                  |
| Delete  | Deletes the currently selected Message ID.                                  |

## Window Fields and Controls

| Fields                   | Description                                                                                                                                                                                               |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Form Fields       | The Select Form Fields List displays the form tables and fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token to the message text. |
| Select System Fields     | The Select System Fields List displays system tables and fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token to the message text. |
| Select Global Fields     | The Select Global Fields List displays global fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token 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.                        |
| Database Function        | This read only field shows the Database Function returned from the Database Function Lookup.                                                                                                              |
| Database Function Lookup | This button opens the Database Function Lookup window.                                                                                                                                                    |
| Database Function Insert | This button adds the Database Function shown in the Database Function field to the Message field.                                                                                                         |
| Message Field            | This text field allows typing and cut & paste of strings, text, and tokens that will be used in the E-mail body.                                                                                          |

## Window Example

The screenshot below shows an example of a parameterized message for an unposted Sales Order Processing document.



**Note:** Tokens 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 Tokens shown in the message will be replaced with the actual value of the fields when the E-mail is created. These Tokens should not be altered in any way.

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

## Report Formats

When using Forms Printer to export reports to file or E-mail 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. For details regarding these extensions, see the manufacturer documentation provided with Crystal Reports or SQL Reporting Services.

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

## Subject and Attachment Name Editor

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

### Window Buttons

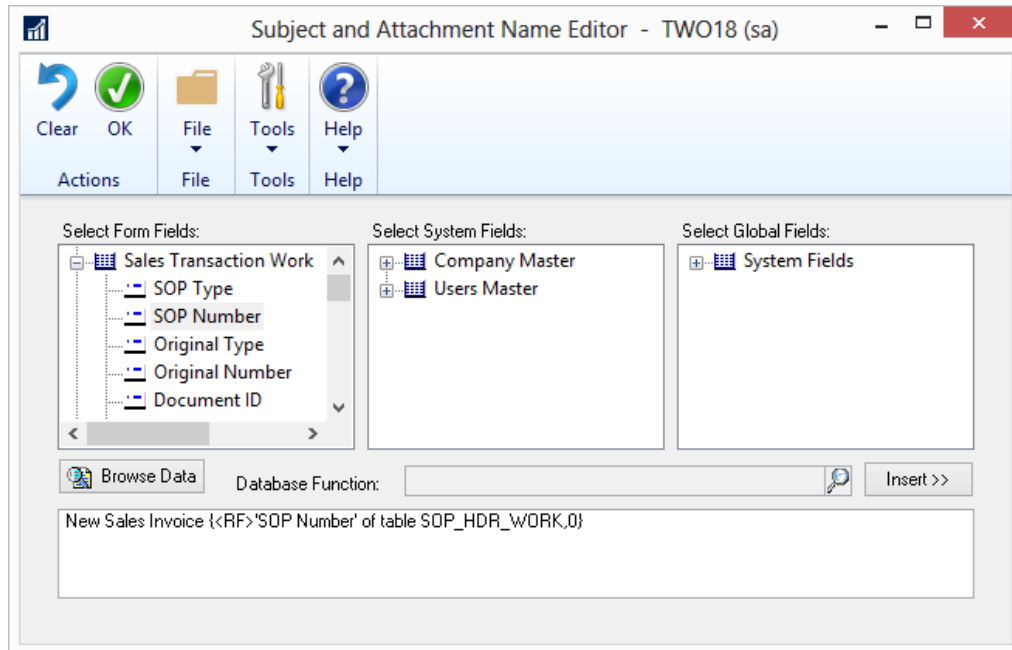
| Buttons | Description                                                                                                                                      |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Clear   | This button removes the Subject / Attachment field contents.                                                                                     |
| Ok      | This button closes the Subject and Attachment Name Editor window and returns the contents of the Subject / Attachment field to the setup window. |

### Window Fields and Controls

| Fields                     | Description                                                                                                                                                                                                             |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Form Fields         | The Select Form Fields List displays the form tables and fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token to the Subject / Attachment field. |
| Select System Fields       | The Select System Fields List displays system tables and fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token to the Subject / Attachment field. |
| Select Global Fields       | The Select Global Fields List displays global fields available to be used as Tokens for the selected document type. Double clicking on a field adds that field as a token to the Subject / Attachment field.            |
| 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.                                      |
| Database Function          | This read only field shows the Database Function returned from the Database Function Lookup.                                                                                                                            |
| Database Function Lookup   | This button opens the Database Function Lookup window.                                                                                                                                                                  |
| Database Function Insert   | This button adds the Database Function shown in the Database Function field to the Subject / Attachment field.                                                                                                          |
| Subject / Attachment Field | This text field allows inserting, typing and cut & paste of strings and tokens that will be used in the E-mail Subject or Attachment.                                                                                   |

## Window Example

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



**Note:** Because Subject and Attachment Tokens are based on document specific tables, the texts created are available to be used only by the document group for which they were created. A Subject created for a Statement can be used as the Subject when E-mailing statements. A Subject created for unposted Sales Transactions, however, can be used for all unposted Quotes, Orders, Invoice, Returns, and Backorders. A Subject created for Historical Sales Documents may be used only for posted Quotes, Orders, Invoice, Returns, and Backorders. Subjects for Purchase Orders may be used only for Purchase Order formats.

## Select File Name Window

The Select File Name window is used to define a file path using a combination of text and Token values.

The Select File Name window can be opened from the Forms Printer Setup window's [To File Delivery Setup](#), and the [Subject and Attachment Name Editor](#) window.

The use of Database Functions is described in detail in the [Advanced Features](#), [Database Functions](#) section of this User Guide.

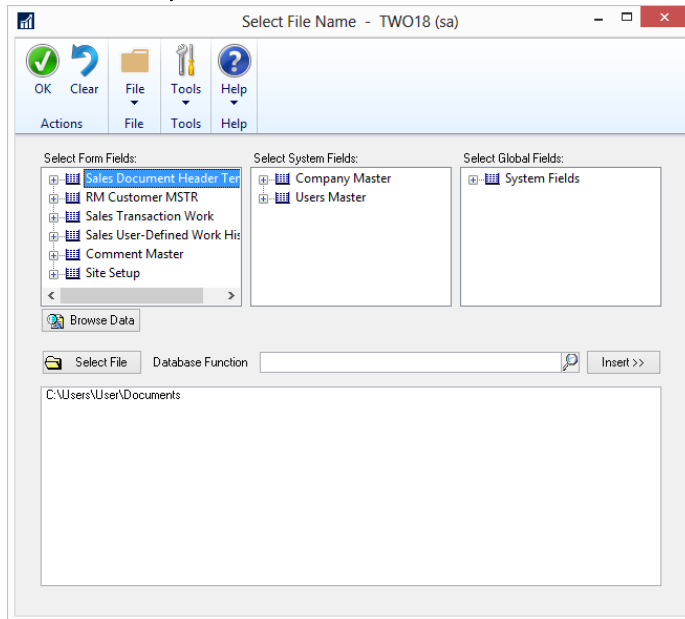
### Window Buttons

| Buttons | Description                                                                                                                                      |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Clear   | This button removes the Subject / Attachment field contents.                                                                                     |
| Ok      | This button closes the Subject and Attachment Name Editor window and returns the contents of the Subject / Attachment field to the setup window. |

### Window Fields and Controls

| Fields                     | Description                                                                                                                                                                                       |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 File Name field. |
| 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 File Name field.    |
| 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 Name field.        |
| 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.                |
| Database Function          | This read only field shows the Database Function returned from the Database Function Lookup.                                                                                                      |
| Database Function Lookup   | This button opens the Database Function Lookup window.                                                                                                                                            |
| Database Function Insert   | This button adds the Database Function shown in the Database Function field to the Subject / Attachment field.                                                                                    |
| Subject / Attachment Field | This text field allows inserting, typing and cut & paste of strings and tokens that will be used in the File Name field.                                                                          |

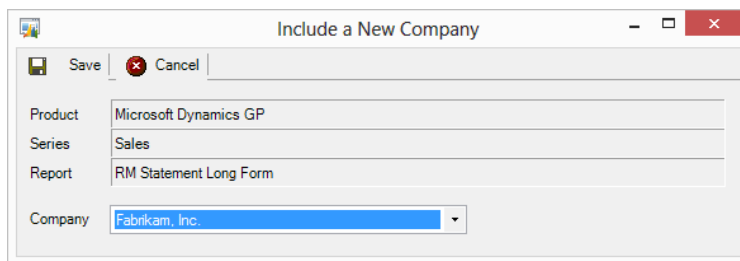
## Window Example



## Adding a Company Record

**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.



## Adding 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.

## Adding 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.

## Adding a Master Record

**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.

|           |                                   |
|-----------|-----------------------------------|
| Product   | Microsoft Dynamics GP             |
| Series    | Sales                             |
| Report    | SOP Invoices Blank Paper Unposted |
| Company   | Fabrikam, Inc.                    |
| Master ID | AARONFIT0001                      |
|           | Aaron Fitz Electrical             |

## 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.

**Note:** Several Dialogs are presented during Forms Printer Print and Delivery. Many of these dialogs are customizable, or in some case can be suppressed to aid in streamlining your printing and Delivery processes.

## Sample Reports in Forms Printer Base

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:

### Crystal Reports Sample Reports

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.

### Installed Sample 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.

### Using Sample 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.

### Modifying Sample Crystal Reports

In order to modify the Forms Printer Base sample reports for use in your environment, you will need to have an installed copy of Crystal Reports application. Contact your partner or SAP for licensing and purchasing questions.

### Steps for Customizing Crystal Report Sample 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 Sample Reports

### Installed Sample 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.

### 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.



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, the Report Builder Available from the SSRS Report Manager web page, 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.

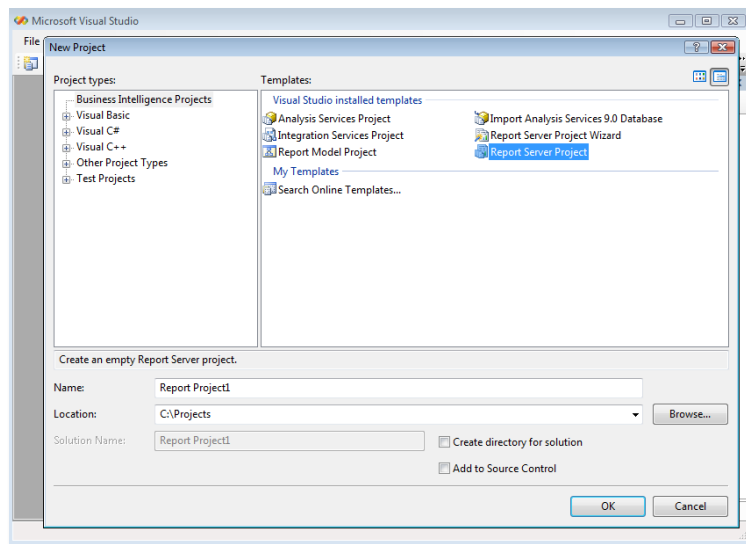
### Steps for Customizing SSRS Sample Reports

#### 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.

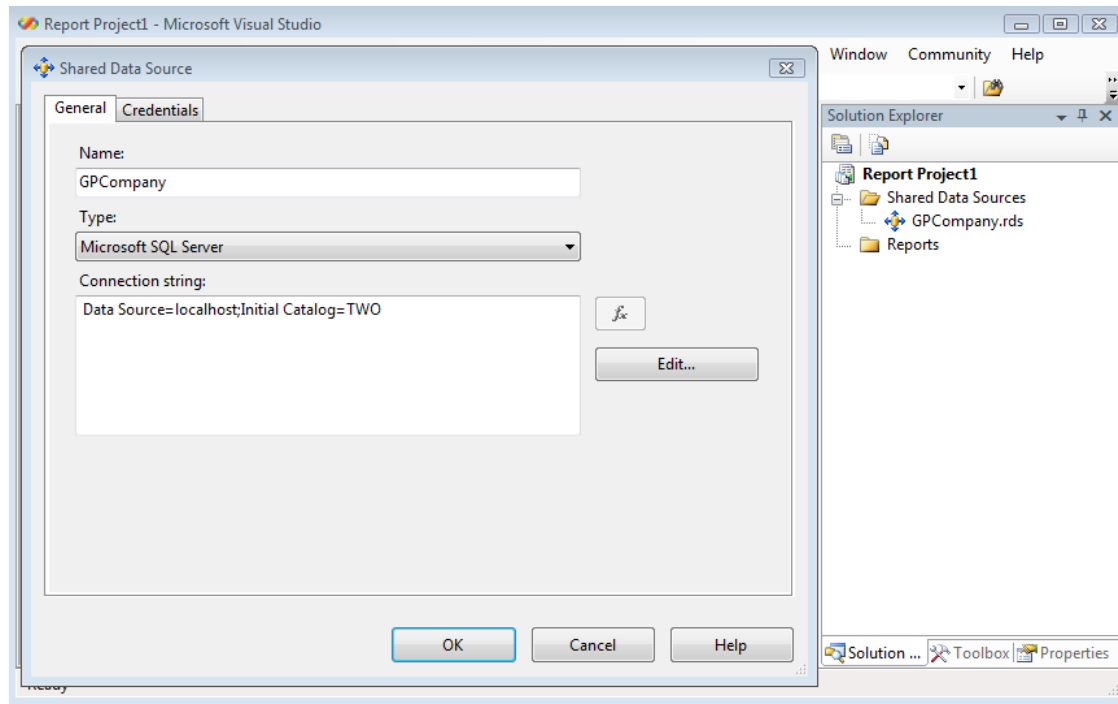
Launch either Business Intelligence Development Studio or Visual Studio.

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

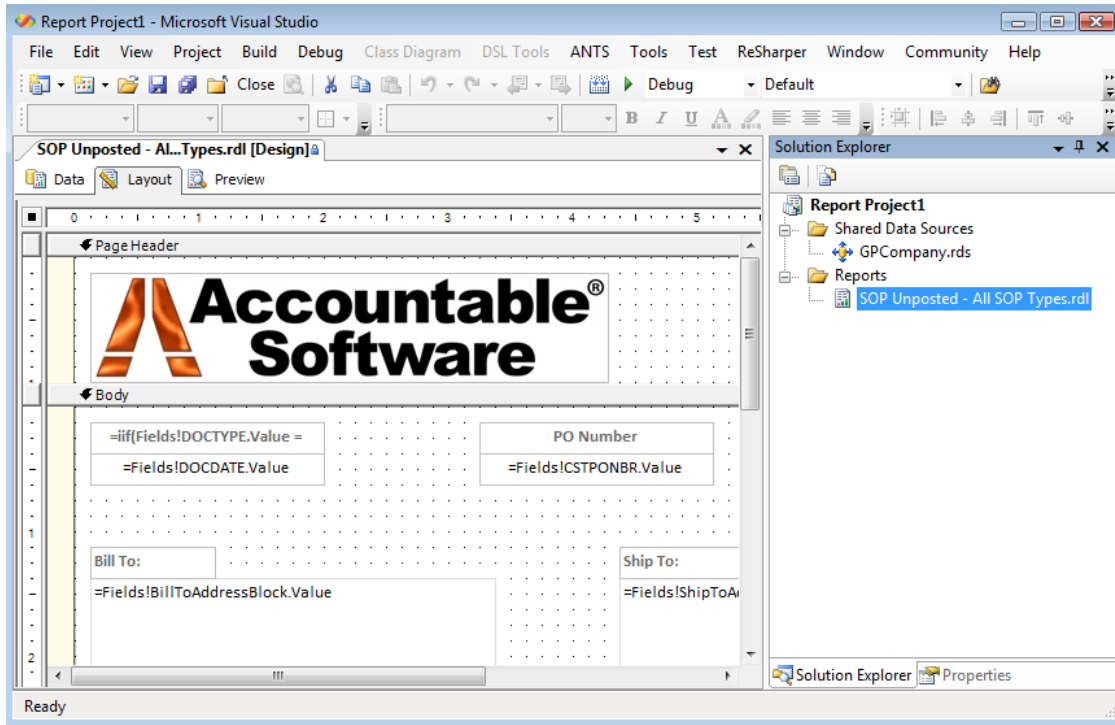
All Forms Printer SSRS reports are configured to use a data source called **GPCompany** for data retrieval. You will need to create this data source in your project. The new data source should point to a Dynamics GP company database on your SQL Server. To create the data source, right click on the Shared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

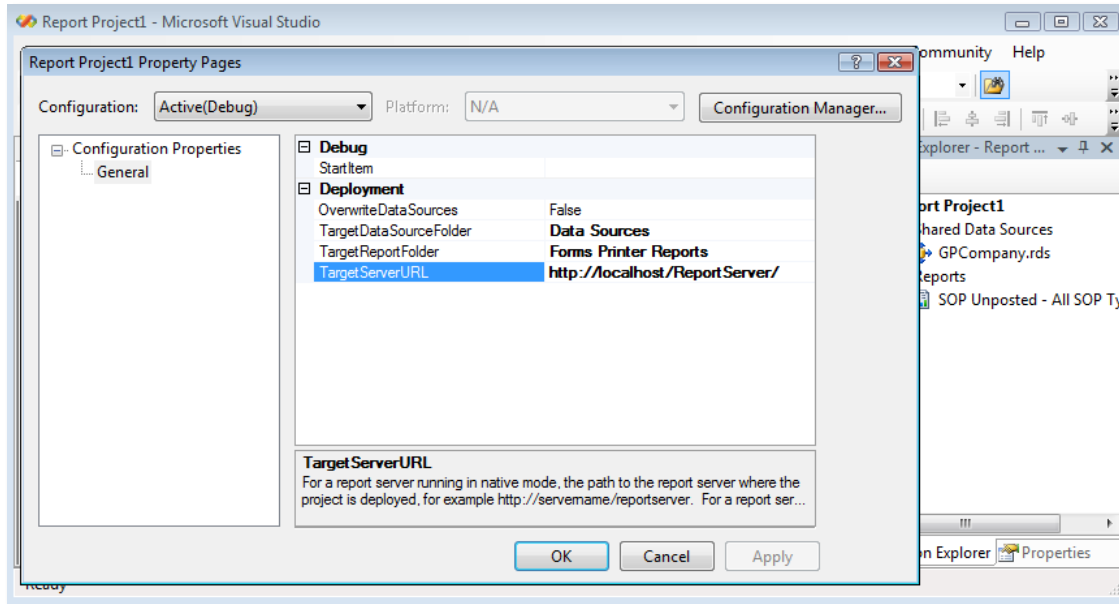
Add the report(s) that you wish to modify. The report layout, and SQL query can then be modified as desired.



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.

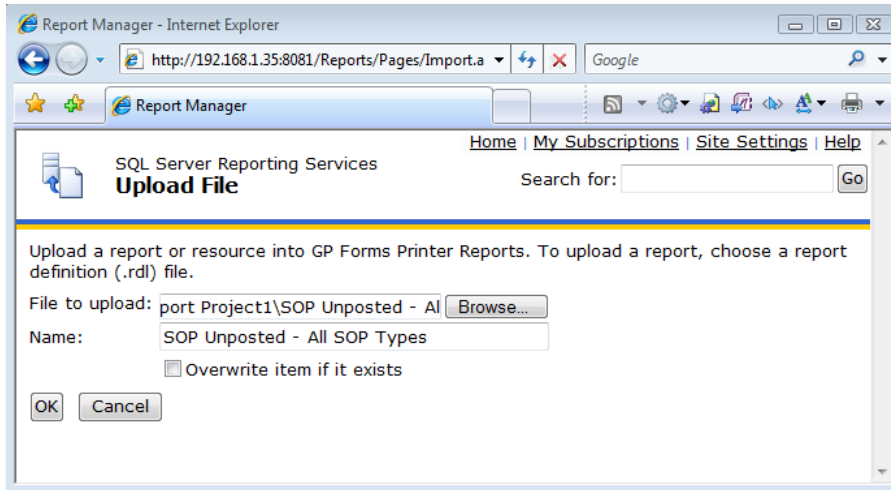
#### Deploying Unmodified Forms Printer SSRS Reports to a Report Server

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

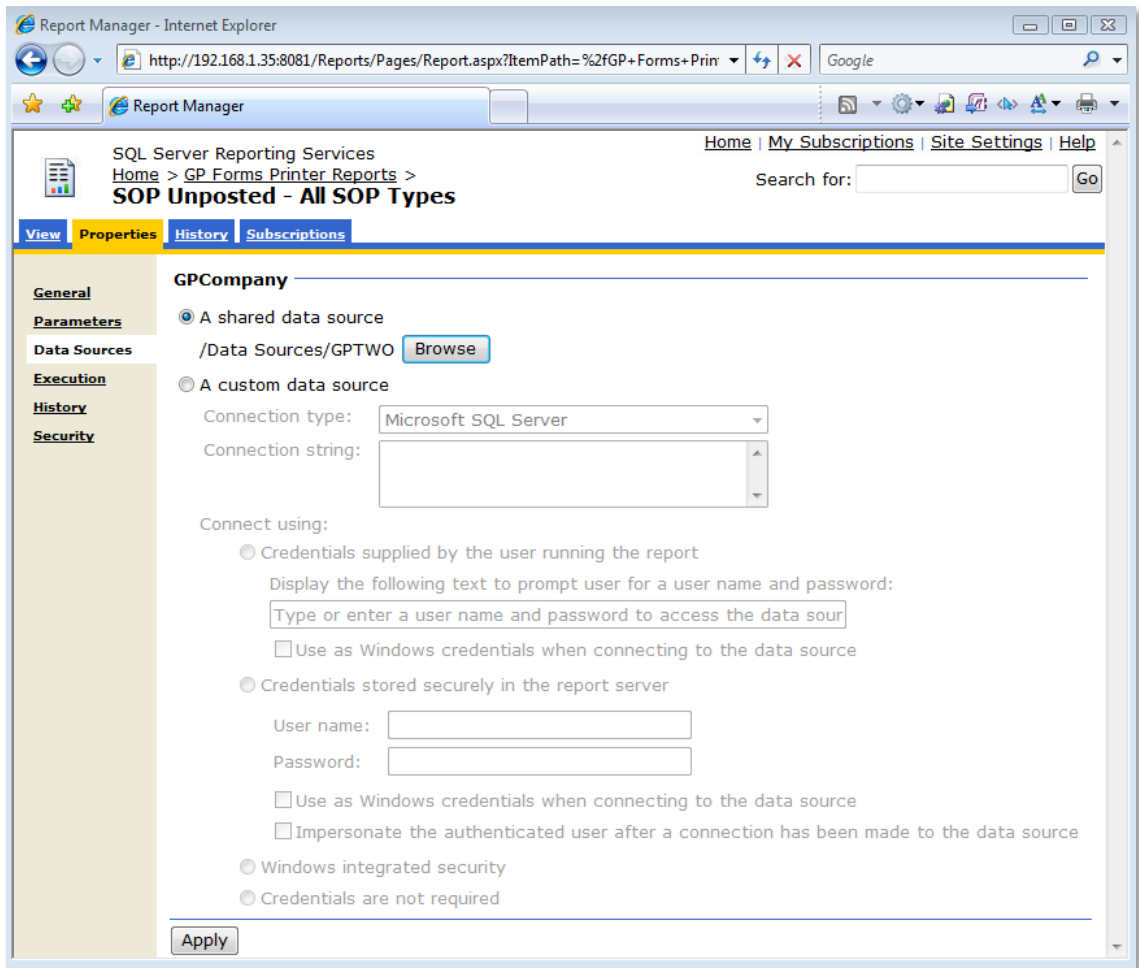
Launch your web browser and navigate to the Reporting Services Report Manager web application. By default, the URL is **http://<servername>/Reports**. Click the **Upload File** link on the Contents tab of the Home page, or on any folder page. This will open the Upload File web page. Browse to the report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

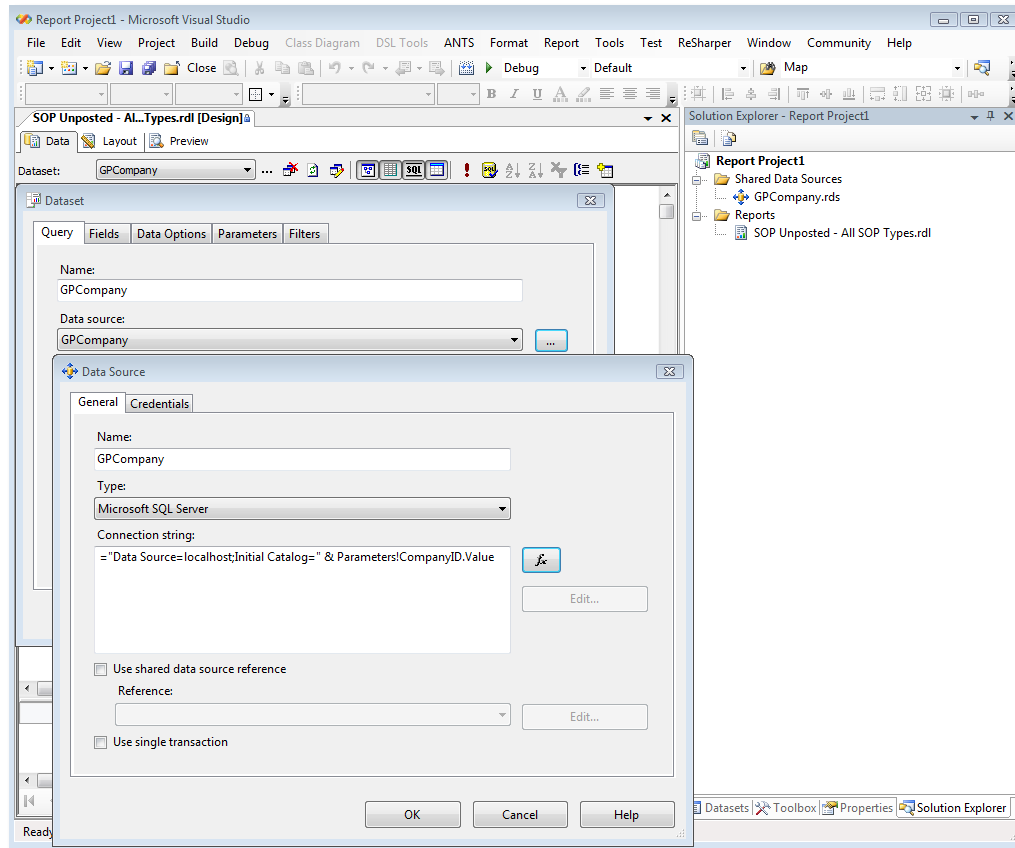
Using the Report Manager Web application, a report can be published to multiple folder locations on the Report Server, with each copy configured to use a different company specific data source.

#### 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 Base System 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.



# Forms Printer Plus

## Overview

Once the Configuration of Forms Printer is complete, the next step is to add Forms Printer Plus reports, 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 E-mail.

To begin this process, open the Forms Printer Plus Setup Window, 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.

## Forms Printer Plus Setup Window

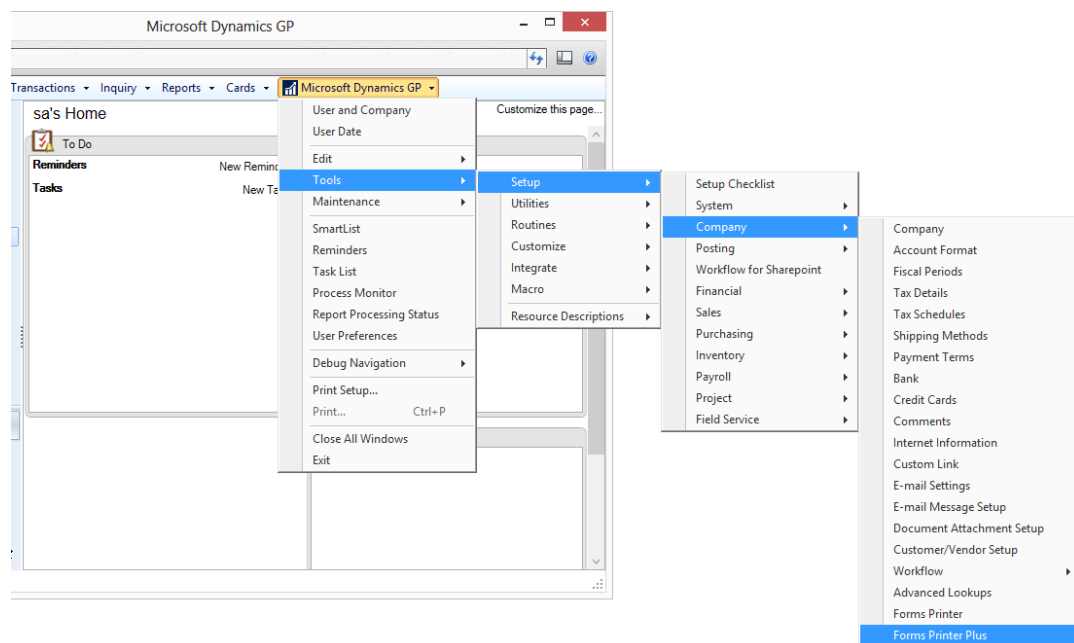
The Forms Printer Plus Setup window is used to view and modify previously defined report setups as well as to launch the Forms Printer Plus Setup Wizard where new reports can be defined.

### Window Navigation

To access the setup information, use the Menu item:

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

The screenshot below shows the menu path.



### Window Buttons

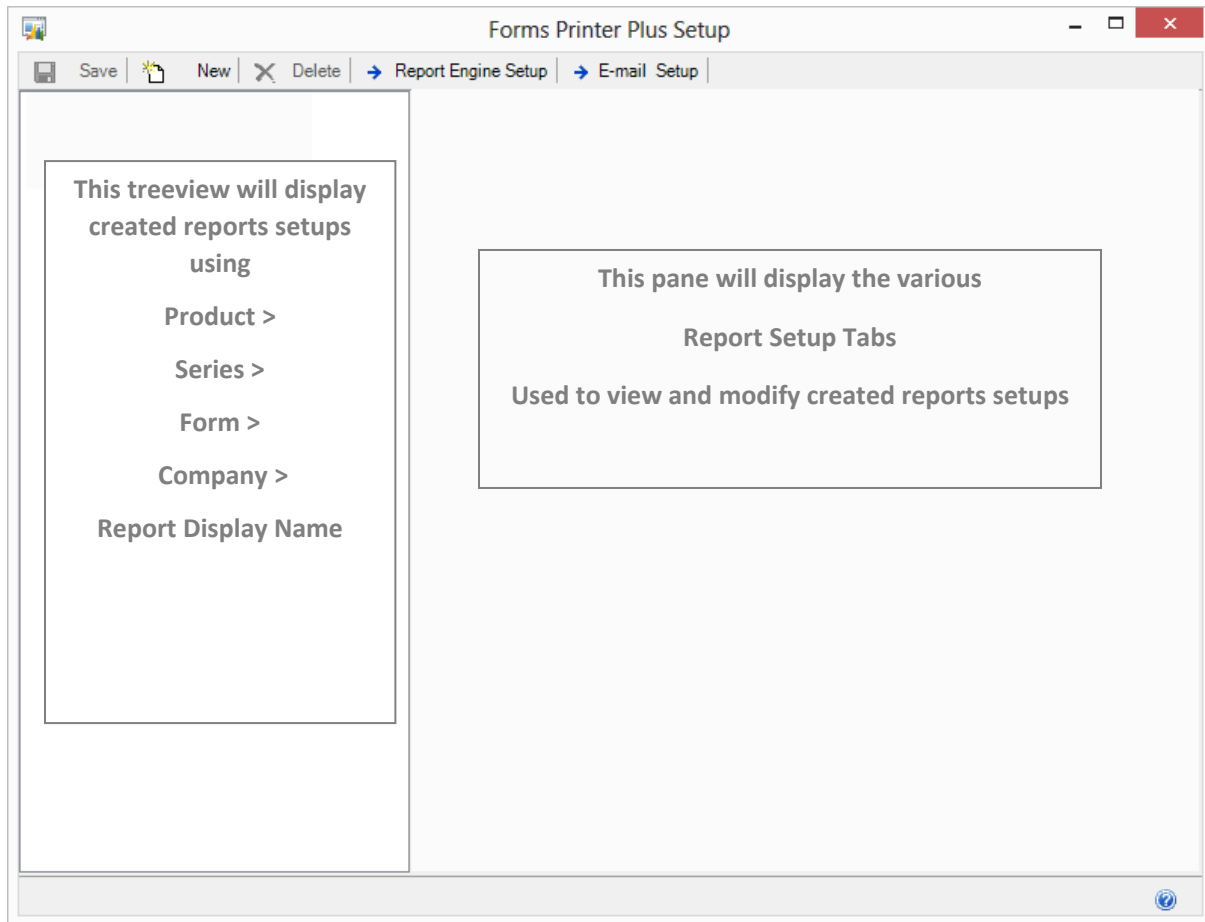
| Buttons                    | Description                                                                                                                                                                                                      |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Save</b>                | Saves any changes made to window values.                                                                                                                                                                         |
| <b>New</b>                 | This button opens the Forms Printer Plus Setup Wizard where a new report setup can be defined.                                                                                                                   |
| <b>Delete</b>              | Deletes the currently selected report from the tree view.                                                                                                                                                        |
| <b>Report Engine Setup</b> | 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. |
| Setup Options Pane | 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. |

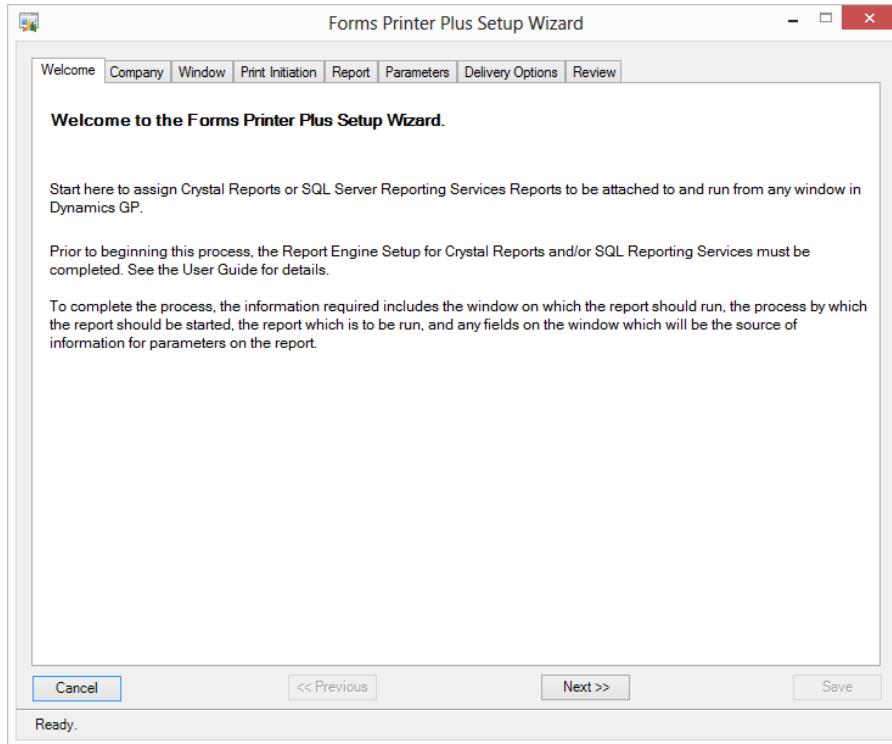
## Wizard Tabs

Using the Wizard buttons allows the user to navigate through each of the Wizard tabs, choosing options for setup.

## 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 <b>All Companies</b> or within a <b>Specific Company</b> . By default, the setup will be available in all companies. To define the setup for an individual company, mark the <b>Specific Company</b> 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

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Company Selection' step. 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 instruction: 'Define which companies should run the report. Additional company and report combinations can be defined by going back through the wizard setup.' Below this, there is a 'Companies' section with two radio buttons: 'All Companies' (which is selected) and 'Specific Company'. Under the 'Specific Company' radio button, there is a list box containing the text 'Fabrikam, Inc.' and 'Accountable Test'. At the bottom of the window, there 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 <a href="#">Help Me Choose Window Picker</a> for details. |
| Window Lookup  | This button opens the <b>Window Lookup</b> window allowing the user to manually select the window on which the report will be available. See the <a href="#">Window Lookup Window</a> 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

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Window Selection' tab. The wizard has 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 description: 'Define which Window the report should run from. Selecting the window includes choosing the product and form in which the window exists.' There are four text input fields: 'Product' (containing 'Microsoft Dynamics GP'), 'Series' (containing 'Financial'), 'Form' (containing 'GL\_Inquiry\_Current\_Summary'), and 'Window' (containing 'GL\_Inquiry\_Current\_Summary'). To the right of the 'Product' field is a 'Help Me Choose' button. To the right of the 'Form' and 'Window' fields is a 'Window Lookup' button. Below the 'Window Lookup' button is a note: 'To select the Product, Series, Form and Window from lists, click Window Lookup.' At the bottom of the wizard, there are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'. The status bar at the very bottom says '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                                                                                                                                                           |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Product</b> | 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.          |
| <b>Series</b>  | 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.                           |
| <b>Forms</b>   | 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. |
| <b>Window</b>  | 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 - TWO18 (sa)

Product: Microsoft Dynamics GP

Series: Financial

Forms

| Technical Name                  | Display Name                   |
|---------------------------------|--------------------------------|
| GL_Account_Maintenance          | Account Maintenance            |
| GL_Account_Segment_Restrictions | Account Segment Ranges         |
| GL_Account_Summary              | Account Summary                |
| GL_Account_Summary_History      | Account History                |
| GL_Batch_Entry                  | Batch Entry                    |
| GL_Budget_Journal_Hist_Lookup   | History Budget Journal Entries |
| GL_Budget_Journal_Lookup        | Budget Journal Entry           |
| GL_Budget_Maintenance           | Budget Maintenance             |

Windows

| Technical Name     | Display Name    |
|--------------------|-----------------|
| GL_Account_Summary | Account Summary |

## 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 <a href="#">Help Me Choose Field Picker</a> for details. |
| Field Lookup   | This button opens the <b>Field Lookup</b> window allowing the user to manually select button to be used in launching the report. See the <a href="#">Field Lookup Window</a> for details.           |

### Tab Fields

| Field                  | Description                                                                                                                                                             |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Product</b>         | This displays the product containing the selected window.                                                                                                               |
| <b>Window</b>          | This displays the selected window.                                                                                                                                      |
| <b>Print From</b>      | This radio group determines whether the report will be run from the Additional menu or from a button on the window.                                                     |
| <b>Additional Menu</b> | 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.                   |
| <b>Menu Name</b>       | 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.           |
| <b>Window Button</b>   | This radio button option is selected when the report is to be run by clicking on a button on the selected window.                                                       |
| <b>Window Button</b>   | 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 or 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

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Print Initiation Selection' tab. The window has a standard Windows-style title bar 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:

- A sub-header 'Print Initiation Selection' followed by the instruction: 'Define the method for launching the report. The report can be launched from the Additional menu, or from a window button.'
- Two text input fields: 'Product' with the value 'Microsoft Dynamics GP' and 'Window' with the value 'Summary Inquiry'.
- A section titled 'Print From' containing two radio buttons: 'Additional Menu' (selected) and 'Window Button'.
- A text input field labeled 'Menu Name' with the value 'My Custom Report'.
- A 'Help Me Choose' button with a tooltip that reads: 'To use the point and click field picker, click Help Me Choose. Then click on the desired button in the chosen Dynamics GP window.'
- A 'Field Lookup' button with a tooltip that reads: 'To select the button from a list available from the chosen window, click Field Lookup.'
- At the bottom, there are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'.
- A status bar at the very bottom shows the text '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. |

|               |                                                                                                                                                                                                             |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Fields</b> | 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

| Field Name                    | Datatype    |
|-------------------------------|-------------|
| Clear Button                  | Push Button |
| Currency Button               | Push Button |
| End of File Button - Toolbar  | Push Button |
| Expansion Button              | Push Button |
| Lookup Button 1               | Push Button |
| Next Button - Toolbar         | Push Button |
| Note Absent Button - Toolbar  | Push Button |
| Note Present Button - Toolbar | Push Button |
| Previous Button - Toolbar     | Push Button |
| Redisplay Button              | Push Button |
| Top of File Button - Toolbar  | Push Button |
| WindowHelp                    | Push Button |
| WindowPrint                   | Push Button |
| Workflow View History Button  | Push Button |
| Zoom Button                   | Push Button |

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                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Report Type</b>            | This radio group is used to select between the available report types: Crystal Reports or SQL Reporting Services reports.                                                                                                                                                                                                                                        |
| <b>Crystal Report</b>         | This default radio option enables the Report Path Lookup button to browse the file system for the physical Crystal Report .rpt file.<br><br><b>Note:</b> Crystal Reports added through Forms Printer Plus follow the same “generic” data connection rules as those used in Forms Printer Base. See the <a href="#">Crystal Report Setup</a> section for details. |
| <b>SQL Reporting Services</b> | This option enables the Report Path Lookup button to open the Select Report window listing the published SSRS reports.                                                                                                                                                                                                                                           |
| <b>Report Path</b>            | This text field displays the path / url and name of the report selected by the Report Lookup button.                                                                                                                                                                                                                                                             |

## Window Example

The screenshot shows the 'Forms Printer Plus Setup Wizard' window. The title bar includes standard window controls (minimize, maximize, close). The wizard has a tabbed interface with the following tabs: Welcome, Company, Window, Print Initiation, Report (selected), Parameters, Delivery Options, and Review. The 'Report Selection' section contains the instruction: 'Select the Crystal report or SQL Server Reporting Services report to be launched.' Below this, the 'Report Type' section has two radio buttons: 'Crystal Reports' (selected) and 'SQL Reporting Services'. The 'Report Path' section features a text box containing 'X:\Custom Forms Printer Plus Reports\Account Summary.rpt' and a search icon. At the bottom, there are four buttons: 'Cancel', '<< Previous', 'Next >>', and 'Save'. A 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 <b>Help Me Choose Field Picker</b> for details. |
| Field Lookup   | This button opens the <b>Field Lookup</b> window allowing the user to manually select button to be used in launching the report. See the <b>Field Lookup Window</b> 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.<br><br>The field to be used can be selected manually using the <a href="#">Field Lookup Parameter window</a> or by point and click with the <a href="#">Help Me Choose Parameter Field Picker</a> . |
| 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

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' (selected), 'Delivery Options', and 'Review'. The main content area is titled 'Parameter Setup' and contains instructions: 'Specify how the report parameter values are obtained.' and 'Select a parameter from the list to specify the source of the parameter value.' Below these instructions, there is a list box labeled 'Parameters' containing 'Account Index'. 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 box containing 'Enter Journal Entry:'), 'Use the following value:' (with an empty text box), 'Get the value from the following window field:' (selected, with a text box containing 'Account Index' and buttons 'Help Me Choose' and 'Field Lookup'), and 'Use default value from the report'. Below these options are three more radio button options: 'Use default value from the report', 'Current User ID', and 'Current Company ID'. At the bottom of the window are buttons for 'Cancel', '<< Previous', 'Next >>', and 'Save'. A status bar at the very bottom indicates 'Ready.'

Forms Printer Plus Setup Wizard

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

**Parameter Setup**

Specify how the report parameter values are obtained.

Select a parameter from the list to specify the source of the parameter value.

Parameters

Account Index

Parameter Data Type: Currency

How parameter value is obtained

☐ Prompt for value using the following text:

Enter Journal Entry:

☐ Use the following value:

☒ Get the value from the following window field:

Account Index

Help Me Choose Field Lookup

☐ Use default value from the report

☐ Current User ID

☐ Current Company ID

Cancel << Previous Next >> Save

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.

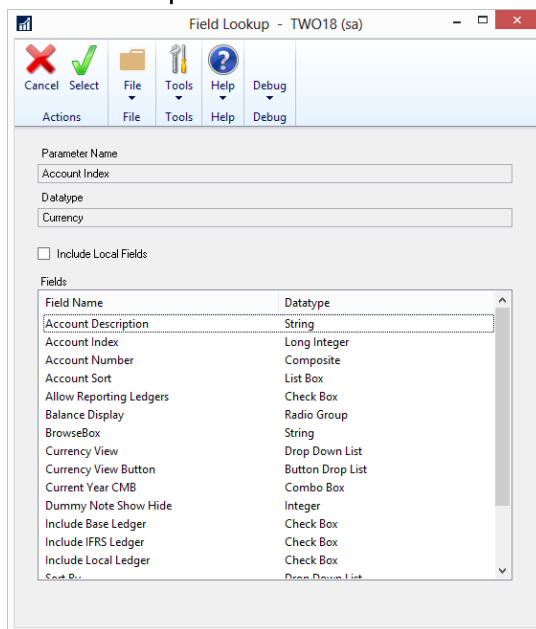
## Window Buttons

| 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 - TWO18 (sa)

Cancel Select File Tools Help Debug

Actions File Tools Help Debug

Parameter Name  
Account Index

Datatype  
Currency

☐ Include Local Fields

Fields

| Field Name              | Datatype         |
|-------------------------|------------------|
| Account Description     | String           |
| Account Index           | Long Integer     |
| Account Number          | Composite        |
| Account Sort            | List Box         |
| Allow Reporting Ledgers | Check Box        |
| Balance Display         | Radio Group      |
| BrowseBox               | String           |
| Currency View           | Drop Down List   |
| Currency View Button    | Button Drop List |
| Current Year CMB        | Combo Box        |
| Dummy Note Show Hide    | Integer          |
| Include Base Ledger     | Check Box        |
| Include IFRS Ledger     | Check Box        |
| Include Local Ledger    | Check Box        |
| Sort By                 | Drop Down List   |

### 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

The screenshot shows the 'Forms Printer Plus Setup Wizard' window, specifically the 'Delivery Options' tab. The window has a standard Windows interface with a title bar and navigation buttons at the bottom. The 'Delivery Options' section is titled 'Specify how the report output is delivered.' and contains three main sections: 'To File', 'To Printer', and 'To Mail'. The 'To File' section is checked and shows 'File Format' as 'Adobe PDF' and 'Save Folder' as 'C:\Reports\{<WF>Account Description} Summary Report.pdf'. The 'To Printer' section is also checked, showing 'Print Using' as 'Specific Printer' and 'Printer' as 'HP Color LaserJet 2700 PCL6 Class Driver'. The 'To Mail' section is checked and shows 'Use Outlook' selected, 'Mail From' as 'Default Outlook User', 'Mail To' as 'Prompt For Email', 'Attachment Format' as 'Adobe PDF', 'Attachment Name' as '{<WF>Account Description} Summary Report', 'Subject' as '{<WF>Account Description} Summary Report', and a 'Message' field containing 'All, Attached is the summary report for Account {<WF>Account Description} as of {<GF>sysdate()}. Please review.' The 'Send Option' is set to 'Send Directly' with 'Hours to Delay' set to '0'. Navigation buttons at the bottom include 'Cancel', '<< Previous', 'Next >>', and 'Save'. A 'Ready.' status bar is at the very bottom.

## Window Fields and Controls

| Fields             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>To File</b>     | 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 <a href="#">Report Destination</a> window.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>File Format</b> | The File Format selection determines the format for the exported document.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Save Folder</b> | 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: <ol style="list-style-type: none"><li>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><br/>Where Report Name is the Report Setup Name entered on the Review tab.<br/>For Example: My Plus Report 06 25 01 8 30 27AM.PDF</li><li>Using the editor window to build the folder path using manually entered text and / or tags from window field values.</li></ol> <p><i>NOTE: Whether manually selected, entered, or built through tags, the folder must exist. Forms Printer Plus will not create the folder.</i></p> |
| <b>Folder Path</b> | 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 <a href="#">Folder Path</a> section for more detail.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>To Printer</b>       | <p>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 <a href="#">Report Destination Window</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Print Using</b>      | <p>Print Using determines where the document will be printed when used within Microsoft Dynamics GP. The valid choices are described below.</p> <p><b>Printer Saved On Report – Crystal Reports ONLY</b></p> <p>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.</p> <p><b>Default System Printer</b></p> <p>This setting instructs Forms Printer Plus to print the selected report to the default printer defined on the user's workstation.</p> <p><b>Ask Each Time Report Prints</b></p> <p>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.</p> |
| <b>Specific Printer</b> | <p>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Copies To Print</b>  | <p>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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>To Mail</b>          | <p>Selecting the 'To Mail' checkbox, allows delivery of the selected document by E-mail.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Use Outlook</b>      | <p>Forms Printer Plus 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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Use Crystal MAPI</b> | <p><b>Note: If using SSRS as the Reporting Engine only Use Outlook is enabled.</b></p> <p>If Outlook is <b>not</b> 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.</p> <p>Because of the limits of the Crystal API, certain functionality is unavailable when not using Outlook.</p> <p>The functional limits when using Crystal MAPI functionality are:</p> <ol style="list-style-type: none"> <li>1. You cannot specify an 'E-mail From' address.</li> </ol> <p>The default profile will be used as the 'From' address.</p>                                                                                            |

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    | <p>2. You cannot name the attachment.</p> <p>The attachment name will be the same as the Crystal Report used to create it.</p> <p>3. You cannot specify the Send Option.</p> <p>The E-mail will be sent automatically to the recipient.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Mail From</b>   | <p>The 'E-mail From' dropdown list will be enabled if Microsoft Outlook is installed. This dropdown list is populated by default from the Outlook Global Address List. Here you have the option to use the default Outlook User, or specify a specific E-mail Address to use as the 'Send On Behalf Of' mail 'From'. If using an E-mail Address 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.</p> <p><b>Note:</b> In order to use the 'To Mail' feature of the Forms Printer Plus Delivery, the client workstation must have a <b>Messaging Application Programming Interface (MAPI)</b> compliant E-mail application loaded. The full version of Microsoft Outlook is currently the only supported MAPI client According to the Crystal /Business Objects/SAP web site. To have access to all of Forms Printer Plus's E-mailing functionality, it is recommended to use Microsoft Outlook 2000 or Greater.</p> <p>Additional help with E-mail issues can be found in the <a href="#">Troubleshooting E-mail Errors section of this document</a>.</p> |
| <b>Mail To</b>     | <p>The E-mail To radio group allows a selection of either Prompt For E-mail or Manually Entered. To have the printing user enter an E-mail address at the time the E-mail is created, leave the default of 'Prompt'. To enter a hardcoded E-mail at the time of setup, mark the Manually entered option and enter a valid E-mail Address or semi colon separated list of addresses.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Send Option</b> | <p>The Send Option dropdown list allows you to select the destination for the created E-mail.</p> <p>The selections for Send Options are described below.</p> <ul style="list-style-type: none"> <li>• <i>Send Directly to E-mail Recipient:</i> Automatically sends the E-mail.</li> <li>• <i>Save To Outlook Drafts folder:</i> Creates the E-mail in the Drafts folder. E-mail must be sent manually.</li> <li>• <i>Save to Outlook Outbox:</i> Creates the E-mail and saves it to the Outbox. E-mail must be sent manually.</li> <li>• <i>Save to Outlook Outbox Delayed:</i> Creates the E-mail and saves it to the Outbox. E-mail will be sent automatically at the specified time selected by the Hours to Delay option.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

- *Display created E-mail:* Creates the E-mail displays the E-mail rather than sending or saving it. Once any required modifications are made, the E-mail can be modified and then saved or sent manually.
- *Reply To Selected E-mail:* By default, Forms Printer will prompt the user notifying them that the Reply To Selected E-mail is about to run, giving the user a chance to select the E-mail they wish to reply to. After clicking Ok on the dialog, the document and E-mail body, as defined in Forms Printer Setup, will be attached as a reply to the user's selected E-mail.

**Note:** Several important points need to be understood when using the Reply To Selected E-mail feature:

1. The user must select an E-mail Item. A message will be generated if the selected Item is not an E-mail which can be replied to giving the user one additional chance to select the correct Reply To E-mail Item.
2. The feature is disabled when E-mailing a batch or range of documents. The documents will be created as defined in Setup but will be saved to the Drafts folder as new E-mails in the case of batch or range E-mailing.
3. The feature will work whether the user has already clicked Reply or not.
4. The feature works when using the Inline Reply or the Pop Out reply.
5. This feature ALWAYS uses the Reply All option when replying to the selected E-mail.
6. The dialog notifying the user to select the Reply To E-mail can be disabled in the Dex.ini. See [ASIOUTLOOKREPLYPRESELECT](#) for more details on this setting.

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hours To Delay</b>    | The Hours to delay option is enabled when the Send Option dropdown list is set to 'Save to Outlook Outbox Delayed'. Setting this number adds the specified number of hours to the current system time, and uses that to set the E-mail's delayed send property. For example, if the E-mail was created at 10:15 AM, and the Send option was set to Save To Outlook Outbox delayed, with an Hours To Delay setting of 12, the E-mail would be created in the Outbox, and would stay there until 10:15 PM, and then it would be E-mailed to the selected Recipients. |
| <b>Attachment Format</b> | The Attachment Format dropdown list allows you to specify the format for the E-mail attachment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Attachment Name</b>   | The Attachment Name allows you to enter the text, as it will appear in the E-mail for the attachment name. To create a calculated Attachment Name, open the Subject and Attachment Name Editor window using the expansion button. When creating an attachment name, the following characters should be avoided, as they are invalid in the name of a file:<br><div style="text-align: center;">\ / ? * : " &lt; &gt;  </div>                                                                                                                                       |

|                |                                                                                                                                                                                                                                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                | See the <a href="#">Editor Window</a> for specifics on creating a parameterized Attachment Name.                                                                                                                                                                       |
| <b>Subject</b> | E-mail Subject sets the text, as it will appear in the E-mail Subject line. To create a calculated subject, open the E-mail Subject Editor window using the expansion button. See the <a href="#">Editor Window</a> for specifics on creating a parameterized Subject. |
| <b>Message</b> | This field displays the Message as it will appear in the E-mail body. To create a calculated Message, open the E-mail Message Editor window using the expansion button. See the <a href="#">Editor Window</a> 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                                                       |
|--------------------------|-------------------------------------------------------------------|
| <b>Report Setup Name</b> | This field is used to enter the display name of the report setup. |
| <b>Review pane</b>       | The review pane shows the selections made on the various windows. |

## Window Example

The screenshot shows the 'Forms Printer Plus Setup Wizard' window with the 'Review' tab selected. The window title is 'Forms Printer Plus Setup Wizard'. The tabs at the top are: Welcome, Company, Window, Print Initiation, Report, Parameters, Delivery Options, and Review. The 'Review and Finish' section is active, displaying a summary of the setup. The 'Report Setup Name' field contains 'Account Summary Report'. Below this, a scrollable list shows the following details:

- New Report Setup.
- Available for All companies.
- Print from window Summary Inquiry of product Microsoft Dynamics GP.
- Print from Additional menu. The Additional menu will appear after the selected window is closed and reopened.
- Print Crystal Report C:\Users\User\Downloads\Foms Printer Plus Sample and Testing Reports\Journal Entry Detail.rpt.
- Report Parameters:
  - Account Index = Value Of Window Field Account Index
- Deliver To File in Adobe PDF format at location C:\Reports\{<WF>Account Description} Summary Report.pdf.
- Deliver To Printer, Specific Printer HP Color LaserJet 2700 PCL6 Class Driver.
- Deliver To Mail using Outlook.
  - Mail from Default Outlook User.
  - Prompt for Mail To address.
  - Attach report in Adobe PDF format.
  - Send Directly.

At the bottom of the window, there are buttons for 'Cancel', '<< Previous', 'Next >>', and 'Save'. The status bar at the very bottom indicates 'Ready.'

**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.

## 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 opened on the 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.

## 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.



# Advanced Features

## Database Functions

The Database Function feature for Forms Printer allows administrators of Forms Printer Setup to access a SQL User-Defined function which generates a text output as part of Forms Printer's Delivery setup.

### Intended Use

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.

### Important Restrictions

This feature has some important limitations on functionality that must be understood before attempting to use the feature.

Those limitations include:

1. Scalar-valued Functions ONLY – The User-Defined SQL Function must be a scalar-valued function.
2. String / Text Output ONLY – The SQL Database Function must output a string or text.

**Note:** The User-Defined SQL Function can accept any data type, perform any operations needed, manipulate and retrieve any data needed, so long as it ultimately passes back a string /text result. Returning formatted text, it would be possible return more than one "row" of data generated by the function.

### Passing Parameters

Any value from the available Forms Printer fields list or hard coded values can be passed as parameters to the named SQL Database Function. All **HARDCODED** string and date parameters must be surround by single quotes. Tokens passed as parameters DO NOT need quotes as they will be evaluated by Forms Printer and set as needed for their data type.

### Possibilities

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.



## Database Function Examples

### Scenario 1: Format a Date

We have a requirement to export our SOP Invoices in PDF format to a named network location and include as part of the exported file name the SOP Document Date formatted as follows:

Four digit year, a dash separator, two digit day, a dash separator and Month Name as text

For Example, a US formatted date of 9/25/2018 needs to be:

2018-25-September

To accomplish this, we create the example [ASI\\_FormatDate](#) SQL function shown below in our GP Company database "TWO". The function accepts a date and formatting string. It passes back a string of the date year, month and day values formatted using that passed in formatting string.

In our example, we have a drive called "X" with a subfolder called "SOP Invoices". We want to export our SOP invoices to that folder in PDF format with the word "Invoice", the SOP Document Number, and our specially formatted Document Date all part of the file name.

The full text we would enter into the Select Text Window in Forms Printer Setup would be:

X:\SOP Invoices\Invoice {<RF>'SOP Number' of table SOP\_HDR\_WORK,0}-  
{<DF>[TWO].[dbo].[ASI\_FormatDate]}({<RF>'Document Date' of table SOP\_HDR\_WORK,0},  
'year yyyy-dd-MMMM').pdf

### Statement Breakdown

| Statement Parts                               | Explanation                                                                             |
|-----------------------------------------------|-----------------------------------------------------------------------------------------|
| X:\SOP Invoices\Invoice<br>-<br>.pdf          | Literal text parts of the export file and path.                                         |
| {<RF>'SOP Number' of table SOP_HDR_WORK,0}    | The SOP Document number token that will be part of the file name.                       |
| {}                                            | The outer brackets of the Database Function.                                            |
| <DF>                                          | The Database Function Type Indicator                                                    |
| [ASI_FormatDate]()                            | The name of the SQL Database function with open and close parenthesis.                  |
| [TWO].[dbo].                                  | The fully qualified database and owner of the SQL Function.                             |
| 'year yyyy-dd-MMMM'                           | An example string variable passed to the example SQL Database Function.                 |
| {<RF>'Document Date' of table SOP_HDR_WORK,0} | The Document Date Token that will be passed as a variable to the SQL Database function. |

## Result

The resulting example path and file name for invoice number "12345" dated 9/25/18 would be:

X:\SOP Invoices\Invoice 12345-2018-25-September.pdf

## Example SQL Database Function

Below is an example SQL Database Function that uses the SQL **Format** Function to format any passed in date to any valid passed in formatting string.

---

```
USE TWO
GO
IF EXISTS (SELECT * FROM sys.objects WHERE object_id = OBJECT_ID(N'ASI_FormatDate')
AND type in (N'FN', N'IF', N'TF', N'FS', N'FT'))
BEGIN
    DROP FUNCTION [dbo].[ASI_FormatDate]
END
GO

-- =====
-- Author:          Dave Novak
-- Create date: 11-18-17
-- Description: Returns the passed date formatted
--               with the passed in custom formatting string
--
-- Notes:          For more details on supported values
--               See Pre-defined Date and Time formats for the FORMAT Function
--               https://msdn.microsoft.com/en-us/library/ee634813.aspx
--               and
--               Custom Date and Time formats for the FORMAT Function
--               https://msdn.microsoft.com/en-us/library/ee634398.aspx
-- =====
CREATE FUNCTION [dbo].[ASI_FormatDate]
(
    -- Add the parameters for the function here
    @inDate datetime,
    @inFormat varchar(50)
)
RETURNS varchar(50)
AS
BEGIN
    -- Declare the return variable here
    DECLARE @OutFormattedDate varchar(50)

    SET @OutFormattedDate = FORMAT(@inDate, @inFormat)

    -- Return the result of the function
    RETURN @OutFormattedDate

END
GO
--Give Access to GP Users
GRANT EXECUTE ON [dbo].[ASI_FormatDate] TO DYNGRP
GO
```

## Scenario 2: Return a Custom E-mail Subject

We have a requirement to access a date field in a custom table to determine the due date of our SOP Invoice Transaction(s) and set the E-mail Subject according to the document's due date status.

To accomplish this, we create the example [ASI\\_GetPaymentE-mailSubject](#) SQL function show below. The function accepts the SOP Type integer and SOP Number String. It passes back a string formatted as Document Date Month, a space, Document Date Year, a space a dash and a space, and a custom Payment message which will then be used as the E-mail Subject.

The full text we would enter into the Select Text Window in Forms Printer Setup would be:

```
{<DF>[TWO].[dbo].[ASI_GetInvoiceE-mailSubject]({<RF>'SOP Type' of table SOP_HDR_WORK,0},  
{<RF>'SOP Number' of table SOP_HDR_WORK,0})} - Reminder of Upcoming Payment
```

### Statement Breakdown

| Statement Parts                            | Explanation                                                        |
|--------------------------------------------|--------------------------------------------------------------------|
| {<RF>'SOP Type' of table SOP_HDR_WORK,0}   | SOP Type token that will be passed to the SQL Database Function.   |
| {<RF>'SOP Number' of table SOP_HDR_WORK,0} | SOP Document token passed to the SQL Database function.            |
| { }                                        | The outer brackets of the Database Function.                       |
| <DF>                                       | The Database Function Type Indicator                               |
| [ASI_GetInvoiceE-mailSubject]()            | Name of the SQL Database function with open and close parenthesis. |
| [TWO].[dbo].                               | The fully qualified database and owner of the SQL Function.        |
| - Reminder of Upcoming Payment             | Text included in the message                                       |

### Result

The resulting E-mail Subject for an Invoice due last month but within the Grace Period might look like:

November 2018 – Payment Grace Period Reminder

## Example SQL Database Function

Below is an example SQL Database Function that uses the SQL **Format** Function to format any passed in date to any valid passed in formatting string.

---

```
IF EXISTS (SELECT * FROM sys.objects
WHERE object_id = OBJECT_ID(N' ASI_GetPaymentE-mailSubject')
AND type in (N'FN', N'IF', N'TF', N'FS', N'FT'))
BEGIN
    DROP FUNCTION [dbo].[ASI_GetPaymentE-mailSubject]
END
GO

CREATE FUNCTION [dbo].[ASI_GetPaymentE-mailSubject]
(
    -- Add the parameters for the function here
    @SOType int,
    @SOPNumber varchar(15)
)
RETURNS varchar(255)
AS
BEGIN
    -- Declare the return variable here
    DECLARE @Subject varchar(255)
    DECLARE @PaymentDateMonth varchar(9)
    DECLARE @PaymentDateYear char(4)
    DECLARE @MessageType varchar(200)
    DECLARE @PaymentDate datetime
    DECLARE @DateDiff int

    -- Add the T-SQL statements to compute the return value here
    SELECT @PaymentDateMonth = DATENAME(month, [DateDue]),
           @PaymentDateYear = Year([DateDue]),
           @PaymentDate = [DateDue]
    FROM MyCustomTable
    WHERE DocType = @SOType AND InvoiceNumber = @SOPNumber

    SELECT @DateDiff = DATEDIFF(day, @PaymentDate, GETDATE())

    SELECT @MessageType =
    CASE
        WHEN @PaymentDate < DATEADD(day, -30, CAST(CONVERT(VARCHAR(10), GETDATE(), 111) AS
            DATETIME)) THEN 'Past Due Payment'
        WHEN @PaymentDate < CAST(CONVERT(VARCHAR(10), GETDATE(), 111) AS
            DATETIME) THEN ' - payment Grace Period Reminder'
        WHEN @PaymentDate < DATEADD(day, 30, CAST(CONVERT(VARCHAR(10), GETDATE(), 111) AS
            DATETIME)) THEN ' - Reminder of Payment Due This Month'
        ELSE 'Reminder of Upcoming Payment'
    END

    SELECT @Subject = @PaymentDateMonth + ' ' + @PaymentDateYear + ' - ' + @MessageType
    -- Return the result of the function
    RETURN @Subject

END
GO

--Give Access to GP Users
GRANT EXECUTE ON [dbo].[ASI_GetPaymentE-mailSubject] TO DYNGRP
GO
```

---

## HTML Formatted E-mailing

In addition to text E-mails, Forms Printer supports an HTML formatted E-mail Body. It uses standard HTML and allows, with just a few restrictions, the ability to reference anything you might have in an HTML formatted E-mail.

### Important Notes

1. In order for Forms Printer to identify your HTML as markup, you must begin with the <html> tag.
2. There is not WYSIWYG editor for the HTML in Forms Printer so you can either write it directly in the Message Editor window or more preferredly, you can paste in code created elsewhere.
3. You can reference images in your HTML using one of two methods. First, using paths to image files on a public web server such as:

```

```

Or, **only if you first send the E-mail to drafts or to screen** - you can reference a local file path that is valid from your GP workstations. In this case, Outlook will embed the image upon creating the E-mail. For example, this html path to a local image:

```

```

Becomes an embedded image such as this in the sent E-mail:

```

```

4. Due to improvements in the handling of the characters “{” and “}” used in Forms Printer, the HTML functionality now allows the use of those characters in the HTML. This means that elements can now be defined using the <style> tag in the html document header.



## Example HTML Code

---

```
<html>

<head></head>

<body style="font-family: "Lucinda Sans", serif; font-size:11pt;>

<p>Hello,<br/>

I have attached the invoice to your recent order {<RF>'SOP Number' of table SOP_HDR_WORK,0}.
Please follow these steps when making payment:</p>

<ol>

    <li>Review Invoice

    <li>Contact us for ACH / Wire Information

    <li>Send Payment Notification referencing your Invoice Number

</ol>

<p>Best Regards,<br/> <div style="color:DarkSlateBlue; font-family:"Monotype Corsiva"; font-
size:26pt;">Stevie R. Vaughan</div></p>

<p>Customer Service Representative</p>

<p>Accountable Software<br/>70 Buckwalter Rd Suite 900 Royersford, PA 19468<br/>Tel. (610)
983-3100</p>

<p>&#160;</p>

<p><small>The information contained in this message may be privileged, confidential and
protected from disclosure. If the reader of this message is not the intended recipient, or an
employee or agent responsible for delivering this message to the intended recipient, you are
hereby notified that any dissemination, distribution or copying of this communication is
strictly prohibited. If you have received this communication in error, please notify your
representative immediately and delete this message from your computer. Thank you.</small></p>

</body>

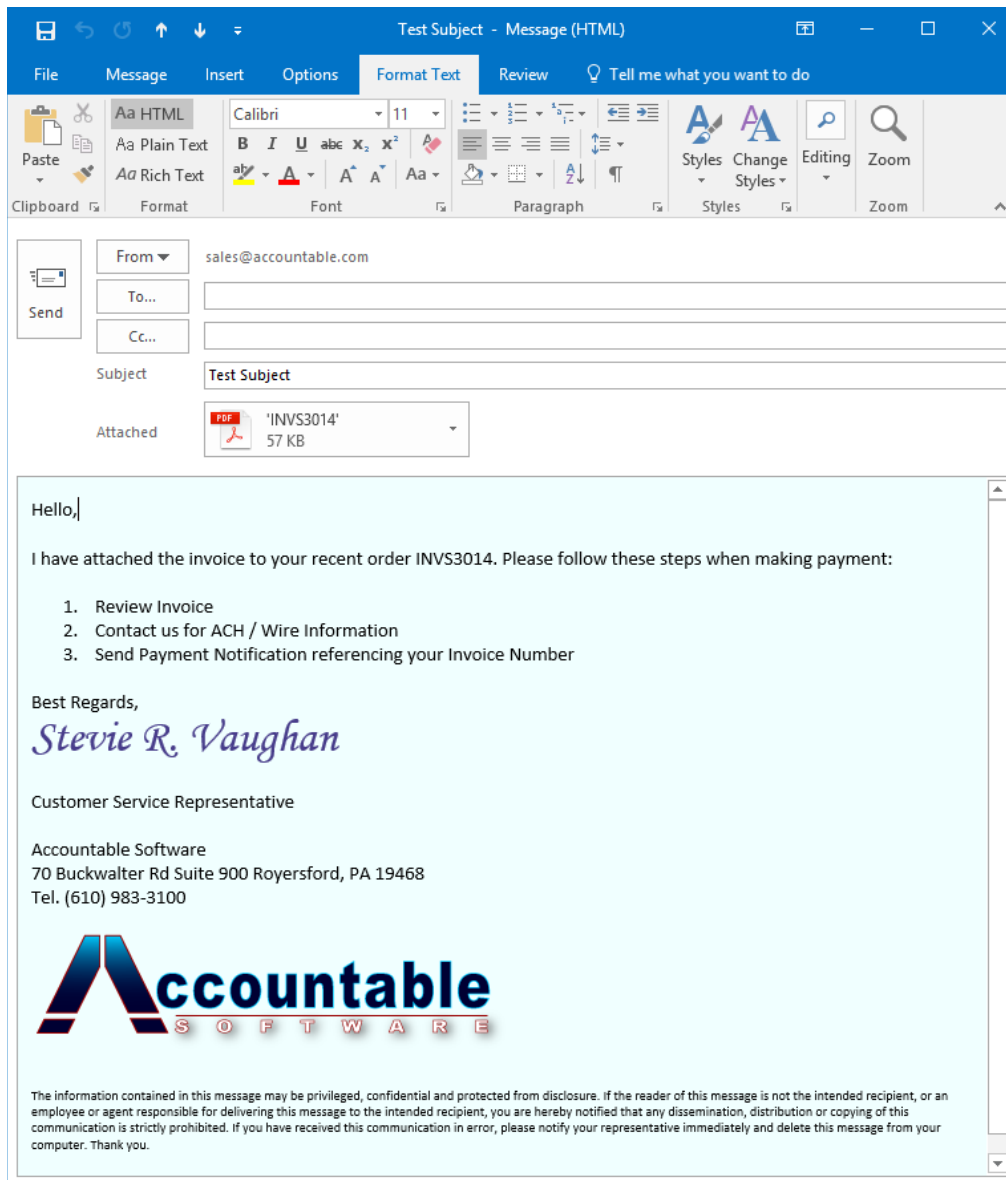
</html>
```

---



## Example HTML E-mail Result

Below is the generated E-mail created by the sample HTML.



# 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 below.

**Note:** Altering Forms Printer settings not documented here is not recommended. Please feel free to contact technical support for assistance with using the Default File Settings.

## Defaults File List

### Controlling the Print or Deliver Dialogs

|                                                  |                                                            |
|--------------------------------------------------|------------------------------------------------------------|
| Change Default Button on Print or Deliver Dialog | <a href="#">ASIFPDEFAULTBUTTONDELIVER</a>                  |
| Change the Print or Deliver Dialog Button Text   | <a href="#">ASIFPPrintOrDeliver DialogDeliverButtonTxt</a> |
| Change the Print or Deliver Dialog Message       | <a href="#">ASIFPPrintOrDeliver DialogMsg</a>              |
| Suppress the Print or Deliver Dialog             | <a href="#">ASIFP SOP FORCE PRINT OR DELIVER</a>           |
| Suppress the E-mail Delivery Results Dialog      | <a href="#">ASIFPEmailResultDialog</a>                     |

### Controlling Other Dialogs and Error Logs

|                                                 |                                                         |
|-------------------------------------------------|---------------------------------------------------------|
| Control the Crystal Reports Print Dialogs       | <a href="#">ASINoPrintDialogs</a>                       |
| Suppress the E-mail Error Report                | <a href="#">ASIFPNoEmailAddressErrorLog</a>             |
| Suppress the Per Customer Dialog                | <a href="#">ASIFP PER CUSTOMER DELIVERY NOASKDIALOG</a> |
| Delay or suppress the ASI_Script Execute Dialog | <a href="#">ASIFPVBSTIMEOUT</a>                         |

### Controlling Outlook and E-mail Behavior

|                                                |                                                |
|------------------------------------------------|------------------------------------------------|
| Show the Reply To Preselection Dialog          | <a href="#">ASIOUTLOOKREPLYPRESELECT</a>       |
| Control No E-mail Print Behavior               | <a href="#">ASIFPEMAILNOPRINTER</a>            |
| Control missing E-mail Attachment Behavior     | <a href="#">ASIFP ERRORONMISSINGATTACHMENT</a> |
| Allow One E-mail & One Attachment per Customer | <a href="#">ASIFP PER CUSTOMER DELIVERY</a>    |
| Disable Outlook Usage                          | <a href="#">ASIFPUseOutlook</a>                |
| Prompt for Outlook Profile                     | <a href="#">ASIOUTLOOKFORCEASKPROFILE</a>      |
| Set Outlook Profile to Specified Value         | <a href="#">ASIOUTLOOKFORCEMAPIPROFILE</a>     |
| Improve Print Performance                      | <a href="#">ASIFP CONSOLIDATEPRINTDELIVERY</a> |

### Miscellaneous Administrative Settings

|                                            |                              |
|--------------------------------------------|------------------------------|
| Keep Number of SOP50200 Records Small      | <a href="#">ASIFPCLEANUP</a> |
| Force re-initialization                    | <a href="#">ASIFPINITIAL</a> |
| Use the .NET version of Crystal Components | <a href="#">ASIUSECINET</a>  |

### Controlling Print Behavior

|                                         |                                              |
|-----------------------------------------|----------------------------------------------|
| Use Default Printer When Not Delivering | <a href="#">ASI FP TOPRINTERDELIVERYONLY</a> |
|-----------------------------------------|----------------------------------------------|

### Settings No Longer Used

|                                        |                                              |
|----------------------------------------|----------------------------------------------|
| Suppress the Print or Deliver Dialog   | <a href="#">ASIFP SOP DONTASK JUST PRINT</a> |
| Consolidating SOP Printing by Customer | <a href="#">ASIFPNAVLISTPRINT</a>            |
| Set E-mail From List                   | <a href="#">ASIFPOutlookFolder</a>           |



## Defaults File Details

The list below includes the details of Defaults File settings used to control various advanced options of Forms Printer.

### ASIFP\_CONSOLIDATEPRINTDELIVERY

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: SOP Reports Only

#### Details

This Boolean switch allows fewer print jobs to be created during batch or range delivery by consolidating all of the identical transaction setups into a single print jobs before sending to printer.

### ASIFP\_ERRORONMISSINGATTACHMENT

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: SOP Reports Only

#### Details

This switch, which must be manually added, when set to TRUE, enforces the Additional Attachments defined in Setup as required to send the E-mail. If a defined attachment is missing, the E-mail generates an error and is saved to the Outlook Drafts folder.

### ASIFP\_PER\_CUSTOMER\_DELIVERY

Default Value: FALSE

Valid Values: Comma separated list of Report Indexes for the SOP document range of 10 to 73

Scope: SOP Reports Only

#### Details

This switch is a comma separated list of SOP Document Report Indexes (Forms Printer's internal ID number for reports) that can be assigned so that the selection and delivery of the specified report is by customer number rather than the default per transaction. When enabled, the switch causes the SOP50200 records to be iterated over in Customer ID order instead of Document Number order, and only one E-mail and one report is generated per customer, during E-mail delivery.

This switch is a very in depth and complex. It requires changes to the design of your report in a way that makes the report unusable in Forms Printer for any other purpose.

The steps to using this functionality are:

1. Choose the report formats you plan to Deliver on a per Customer basis.
2. Determine the Report Index for the report(s) by executing the SQL Statement below in the context of your System Database where Forms Printer has been installed.:

```
SELECT [ASI_Report_Index], [ASISReportDisplayName]
FROM [DYNAMICS].[dbo].[ASI12389] -- Note hard coded System Database name
WHERE ASI_Report_Index BETWEEN 10 and 73 --The range of SOP Documents
```



### ORDER BY ASI\_Report\_Index

3. Modify your Dex.ini to include the entry and Index(s) you want to consolidate.  
For Example: ASIFP\_PER\_CUSTOMER\_DELIVERY\_NOASKDIALOG = 15,33  
This entry would consolidate Report Index 15 (SOP Orders Short Form Unposted) and 33 (SOP Quotes Blank Paper History).
4. Open a copy of your base report for that report format.
5. Modify the report so that it restricts to a single Customer Number using the example below.  
The report restriction must be modified manually in the report since when this setting is active, the "Customer Number for this customer document group" is passed in the 'Sop Number' parameter field for the report instead of the SOP document number usually passed in.  
The selection formula change, shown below in red would be:

{SOP50200.SOPTYPE} = {?SOP Type} AND  
{SOP50200.CUSTNMBR} = {?SOP Number} AND . . .

Where the default entry would typically be in part:

{SOP50200.SOPTYPE} = {?SOP Type} AND  
{SOP50200.SOP Number} = {?SOP Number} AND . . .

6. Map your new report to the proper format in Forms Printer Setup.
7. Print the report from a location where multiple documents will be printed such as Print Sales Documents.

When the Print or Deliver dialog opens, and the 'Deliver' button is pressed, an additional informational dialog is opened, if the Dex.ini switch ASIFP\_PER\_CUSTOMER\_DELIVERY\_NOASKDIALOG is set to FALSE

### ASIFP\_PER\_CUSTOMER\_DELIVERY\_NOASKDIALOG

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: SOP Reports Only and only when ASIFP\_PER\_CUSTOMER\_DELIVERY is enabled

#### Details

This Boolean switch is used only in conjunction with the ASIFP\_PER\_CUSTOMER\_DELIVERY switch. It suppresses the special 'Per Customer' Dialog:

"Special SOP Form Delivery Enabled: Consolidated Customer Documents, 1 per Customer will be delivered: ASIFP\_PER\_CUSTOMER\_DELIVERY"

When displayed, that dialog offers buttons for "Continue" or "Cancel".

### ASIFP\_SOP\_FORCE\_PRINT\_OR\_DELIVER

Default Value: FALSE

Valid Values: FALSE | PRINT | DELIVER

Scope: SOP Reports Only

#### Details

This string switch allows for values "FALSE", "PRINT" or "DELIVER" so that regardless of whether there are delivery options defined for a given SOP Document, the Print or Delivery action will be determined by this switch without prompting the user.

### ASIFP\_SUPPRESS\_STMT\_DELIVERY\_WHEN\_NO\_TRX

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: RM Statements Only

#### Details

This Boolean switch stops the E-mailing of Statements when there are no transactions to display on the statement, but the Statement Printing options still included the customer in the list of available statements.

### ASIFPCLEANUP

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: SOP Reports Only

#### Details

This Boolean switch tells Forms Printer to clear out records from the SOP50200 at the conclusion of printing. This is helpful to toggle off during report design when having data in the tables allows report preview. In some cases it is not recommended for SSRS report printing because the records can be removed before the SSRS report finishes

#### ASIFPDEFAULTBUTTONDELIVER

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: Affects All Forms Printer Base Reports

##### Details

This Boolean switch allows you to change which button is the default on the Print or Deliver dialog window. TRUE makes Deliver the default, FALSE makes Print the default. This means that the field has focus when the dialog opens and hitting the enter key selects that option, closes the dialog and continues the process.

#### ASIFPEMAILNOPRINTER

Default Value: N/A - This text entry must be manually added to the Dex.ini file.

Valid Value: Save as Draft

Scope: Affects All Forms Printer Base Reports

##### Details

This text switch looks specifically for the value "Save as Draft". It is used in conjunction with the Send to Print option of the If No E-mail Address setting. If no E-mail is found and Forms Printer instead sends the report to a defined printer, but that printer is not found, Forms Printer by default, will attempt to print using default printer settings. This setting allows you to control that behavior of attempting to print to the default printer and instead writes an error to the log stating, "Specified Printer <printer name> not found."

#### ASIFPEmailResultDialog

Default Value: TRUE

Valid Values: TRUE | FALSE

Scope: Affects All Forms Printer Base Reports

##### Details

This Boolean switch when set to TRUE allows, or when set to FALSE suppresses the E-mail Results Dialog box that is presented by default after one or more E-mails are sent for SOP Documents.

#### ASIFPINITIAL

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: System Wide Setting

##### Details

This Boolean switch, when set to TRUE, will force Forms Printer to re-initialize the table and stored procedure initialization process that occurs automatically during the product installation.

#### ASIFPNoEmailAddressErrorLog

Default Value: TRUE

Valid Values: TRUE | FALSE

Scope: Affects All Forms Printer Base Reports

##### Details

This Boolean switch suppresses the error report presented when delivering by E-mail and E-mail Addresses were missing. This is particularly useful when used with the Send to Printer option of the If No E-mail Address setting.

#### ASIFPPrintOrDeliver\_DialogMsg

Default Value: blank

Valid Values: "" | a string of 255 characters or less

Scope: Affects All Forms Printer Base Reports

##### Details

This string switch allows you to define the Print or Deliver Dialog prompting text. By default, it is "Do you want to print to the printer or use the Forms Printer Delivery System?". If not set in the Dex.ini, the default text is used.

#### ASIFPPrintOrDeliver\_DialogDeliverButtonText

Default Value: blank

Valid Values: "" | Any valid string – recommended 7 characters or less

Scope: Affects All Forms Printer Base Reports

##### Details

This text switch allows you to set the text of the Deliver button on the Print or Deliver dialog. If not set in the Dex.ini, the default text is used.

#### ASIFPUseOutlook

Default Value: TRUE

Valid Values: TRUE | FALSE

Scope: System Wide Setting

##### Details

This Boolean switch when set to FALSE causes Forms Printer not to initialize Outlook. This is used when Outlook is not being used for E-mail Delivery with Forms Printer. When set to TRUE, Forms Printer will not interact with Outlook in any way.

#### ASIFPVBSTIMEOUT

Default Value: 10000 (10 Seconds).

Valid Values: Any valid number in milliseconds | -1

Scope: System Wide Setting

##### Details

To avoid getting the "Script is taking longer than expected to execute" dialog, you can increase the script timeout with this numeric switch. Example: modify the dex.ini setting on each workstation to



ASIFPVBSTIMEOUT=-1 (negative 1) will disable the VBScript Script Control Timeout completely, inhibiting the dialog completely.

ASIFPVBSTIMEOUT=10000 will set it to 10,000 milliseconds (10 Seconds), the default. (you may wish to set it to 30000 for instance).

### **ASINoPrintDialogs**

Default Value: TRUE

Valid Values: TRUE | FALSE

Scope: All Printed Forms Printer Reports set to use Crystal Reports

#### **Details**

This setting can be set to TRUE in order to suppress the Print Dialog displayed by default from Crystal Reports when printing to printer.

Note that Forms Printer also honors the GP NoPrintDialogs switch so the ASINoPrintDialogs can be used to exclusively suppress the Crystal Reports dialog while allowing the dialog for other reports through the system.

### **ASIOUTLOOKFORCEASKPROFILE**

Default Value: FALSE

Valid Values: TRUE | FALSE

Scope: System Wide Setting

#### **Details**

When set to TRUE, this switch will cause Forms Printer to have Outlook prompt for which profile to use when it starts.

### **ASIOUTLOOKFORCEMAPIPROFILE**

Default Value: N/A - This text entry must be manually added to the Dex.ini file.

Valid Values: any valid Outlook Profile Name

Scope: System Wide Setting

#### **Details**

When this switch is set to a value, that value will be used as the Outlook Profile name that Forms Printer will request Outlook to use when starting, this is useful in some Terminal Server Cases where the Outlook E-mail Control panel setting "use default profile" does not seem to work.

### **ASIOUTLOOKREPLYPRESELECT**

**Default Value:** TRUE

**Valid Values:** TRUE / FALSE

**Scope:** System Wide Setting

#### **Details**

This switch controls the dialog presented to the user when E-mailing with the Reply To Selected E-mail setting set to TRUE. This notifies the user that the Reply is about to occur giving them an opportunity to select the desired E-mail and then clicking the Ok button to proceed. By setting this switch to FALSE, the dialog is suppressed and Forms Printer will automatically attempt to reply to the selected Outlook Item. If that item is not a Mail Item (for example a Calendar Entry) or it is not a Mail Item which accepts a reply (such as a system notification), then another dialog appears explaining the issue and allowing the user a chance to select an appropriate item.

### **ASIUSECRINET**

**Default Value:** FALSE

**Valid Values:** TRUE | FALSE

**Scope:** System Wide Setting

#### **Details:**

This Boolean switch, when set to TRUE is used to force Forms Printer to use the Crystal .Net 2008 components. This is used when there is another application integrated to GP using the .NET components and Forms Printer's Crystal components are conflicting. Note that the Crystal .NET components must be installed separately if this setting is going to be used.

### **ASI\_FP\_TOPRINTERDELIVERYONLY**

**Default Value:** FALSE

**Valid Values:** TRUE / FALSE

**Scope:** System Wide Setting

#### **Details**

This switch controls print behavior when the User selects Print from the Print or Deliver Dialog AND Specific Printer is the selected Print Option in Forms Printer Setup. By default, Forms Printer will honor the printer defined in Setup regardless of the User's choice to Print or Deliver. When this entry is set to TRUE, it will allow Forms Printer to use the system Default Printer when Print is chosen and use the defined printer when Deliver is chosen from the Print or Deliver Dialog.

## Out of Use Settings

Defaults File Settings that are no longer in use as of the Build 150 series are listed below.

### ASIFP\_ENABLE\_DATABASE\_FUNCTIONS

Status: No Longer Used

### ASIFPNAVLISTPRINT

Status: No Longer Used

### ASIFP\_SOP\_DONTASK\_JUST\_PRINT

Status: No Longer Used

This switch is no longer used. When in use, it was manually added to the Dex.ini file.

This Boolean switch has generally been replaced by the ASIFP\_SOP\_FORCE\_PRINT\_OR\_DELIVER switch. True suppresses the Print or deliver dialog and prints SOP documents to printer, ignoring any defined delivery options. This is typically used when there are no delivery options and you want printing to occur without the additional dialog.

### ASIFPOutlookFolder

Status: No Longer Used

\*This switch is now maintained using the E-mail Setup button from Forms Printer Setup.

This string enter allows you to enter the name of an address list from which to pull E-mail addresses used to populate the E-mail From list in Forms Printer Setup. Alternatively, it can contain a comma separated list of E-mail addresses. It can also contain the value 'NONE' to force Forms Printer Setup to offer Default User as the only choice.

## Scripted E-mail To Addresses

The Scripted E-mail To Addresses can be used to write a custom SQL Select statement that returns E-mail addresses for the To, Cc, and Bcc fields of E-mails delivered by Forms Printer.

Typical examples of the use of this functionality include instances where E-mail addresses are stored in a table other than the Internet Addresses table, a rule is needed to determine which E-mail address should be returned based on information related to the document or master record.

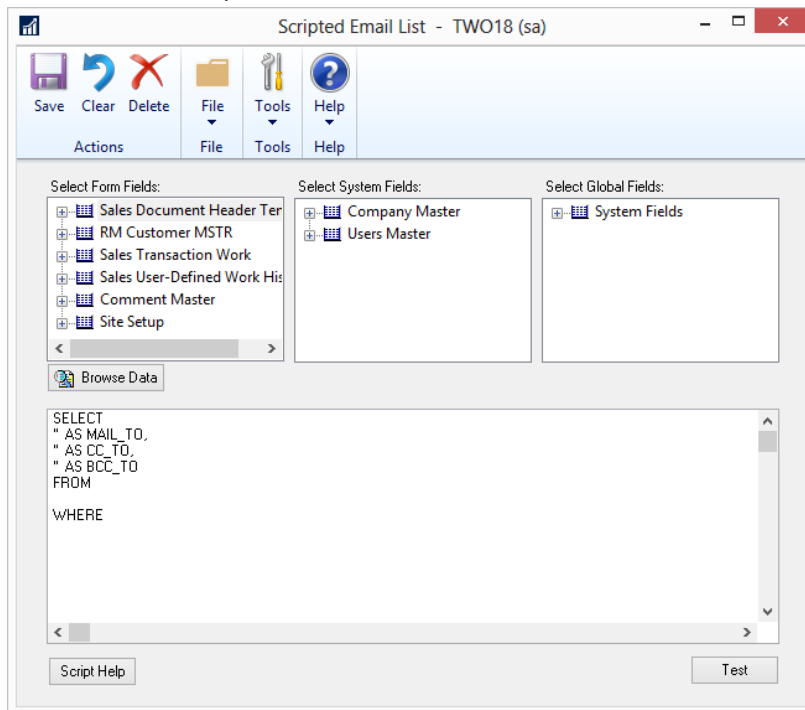
## Window Buttons

| Buttons | Description                                                        |
|---------|--------------------------------------------------------------------|
| Save    | This button saves the changes to the Script and closes the window. |
| Clear   | This button removes the Script contents.                           |
| Delete  | This button removes the Script contents and closes the window.     |

## Window Fields and Controls

| Fields               | Description                                                                                                                                                                                       |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 E-mail Help window which displays a basic explanation on the use of the Scripted E-mail feature.                                                        |
| Test                 | The Run Query Button opens the Scripted E-mail Query Test window where the entered script can be tested for syntax and proper data return based on entered parameters.                            |

## Window Example



## Scripted E-mail Query Test

The Scripted E-mail Query Test window verifies the script entered on the Scripted E-mail 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.

## Window Fields

| Fields          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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         | <p>The results pane shows the returned data from the execution of the query. The data is listed in the form of the returnable fields:</p> <ul style="list-style-type: none"><li><b>Mail To:</b> Displays a semicolon separated list of the E-mail To E-mail addresses returned by the script.</li><li><b>CC To:</b> Displays a semicolon separated list of the CC To E-mail addresses returned by the script.</li><li><b>BCC To:</b> Displays a semicolon separated list of the BCC To E-mail addresses returned by the script.</li></ul> |

## Window Example

Scripted Email Query Test - TWO18 (sa)

File Tools

File Tools

| Parameter Name: | Parameter Value: |
|-----------------|------------------|
| Customer Number | AARONFIT0001     |

Run Query

Results:

## Important Notes on Scripted E-mail To Addresses:

1. The Scripted E-mail To Addresses can return 1 or more E-mail addresses for the E-mail To, CC, and BCC fields. When the script finds more than 1 record matching the selection formula, the records will be returned in a semicolon separated list.
2. The result of executing the E-mail To Script is a return of three columns:
  - Mail To
  - Cc
  - Bcc

If you do not wish to include one or more of these, return a blank column from the script by using empty quotes. For example, if we wanted to return the E-mail To and Bcc but not the Cc we would enter something similar to:

```
SELECT
    <EmailToField> AS MailTo,
    '' AS CC,
    <EmailBccField> AS BCC
FROM <EmailSourceTable>
```

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

```
SELECT
    <EmailToField> AS MailTo,
    <EmailCcField> AS CC,
    <EmailBccField> AS BCC
FROM DYNAMICS.dbo.<EmailSourceTable>
```

4. The Scripted Address lists can be used to return all E-mail addresses for the E-mail. Or you can combine them with the E-mail To option, and Additional Mail To Addresses from the Forms Printer Setup Window.

To use the Scripted Address lists to return all of the E-mail addresses, select the Scripted Mail to List option from the E-mail To dropdown list on the Forms Printer Setup window and leave the Additional Mail to Addresses blank.

5. **BE CAUTIOUS WHEN ENTERING YOUR SCRIPT. YOU ARE RESPONSIBLE FOR ENSURING THE PROPER SCRIPT AND SELECTION CRITERIA HAVE BEEN ENTERED. AN INCOORECTLY ENTERED SCRIPT CAN SEND E-MAILS TO INDIVIDUALS YOU DID NOT INTEND.**

One way to test the script without the possibility of sending incorrect E-mails is to set the Send Option to go to the Drafts folder. That way, you can verify the E-mails created by your script.



## Pre and Post Processing Stored Procedures

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 Preprocessors are called once for each unique record in the table used by Forms Printer to drive the report.

The Post Processor is called once 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.

### \*Important Notes

1. You are not required to create any of these procedures. You only create the procedures you intend to use.
2. You must MANUALLY create the Pre and or Post Stored Procedure in each GP Company database in which you plan to use them.
3. The names of the Stored Procedures must be exactly as specified.
4. The parameters of the report must be exactly as specified in the example stored procedures.
5. You must allow execute permissions for the Stored Procedure to DYNGRP or at a minimum to those GP users that will run statements.
6. If the Stored Procedure does not exist or fails for any reason, Forms Printer will CONTINUE and the reports will be run WITHOUT applying any custom rules or post processing.
7. If you create the procedure but then decide not to use it, it is recommended that you delete or rename the procedure as Forms Printer will call the procedure if it is found.

## RM Statements Pre-Processing

The RM Statement Pre-Processing functionality allows implementors to create, and have Forms Printer execute, a SQL Stored Procedure that applies 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.

### \*Important Notes

8. You must MANUALLY create the Stored Procedure in each GP Company database in which you plan to use the Statement Pre-Processing functionality.
9. The name of the Stored Procedure must be exactly as specified:  
`ASIFP_RM_STATEMENT_PRE_PROCESSING`
10. The parameters of the report must be exactly as specified in the example stored procedure.
11. You must allow execute permissions for the Stored Procedure to DYNGRP or at a minimum to those GP users that will run statements.
12. If the Stored Procedure does not exist or fails for any reason, Forms Printer will CONTINUE and the statements will be run WITHOUT applying any custom rules intended in the Pre-Processing Stored Procedure.
13. Any Customer record that does not return a 1 from the pre-processor will not have records in the ASI12304 and ASI12305 tables.
14. In order to use the Pre-Processor correctly, your report should be based, in part, on the ASI12304 and ASI12305 tables table although, you could use the Pre-Processor to call your own custom processing of records.

## Example Stored Procedure

In the example below, when printing with Forms Printer, using a report with the name "MyCustomStatement", only the Statement for Customer Number "AARONFIT0001" will be included in the statement processing.

```
CREATE PROCEDURE dbo.ASIFP_RM_STATEMENT_PRE_PROCESSING
@ReportPathandName VARCHAR(255),
@CustomerNumber VARCHAR(15)
AS
BEGIN

    DECLARE @Include bit = 1
    DECLARE @localReportName VARCHAR(255)
    -- TO DO:
    -- Enter your calculation below
    -- to set the returned parameter @Include to 0 (false) or 1 (true)
    -- Optionally use the passed in @ReportPathandName to determine your rules
    IF @ReportPathandName LIKE '%MyCustomStatement%'
        BEGIN
            SELECT @Include = CASE
                WHEN @CustomerNumber = 'AARONFIT0001' THEN
                    1
                ELSE
                    0
            END
        END
    -- End of calculation

    SELECT @Include
END

GO

GRANT EXEC ON [dbo].[ASIFP_RM_STATEMENT_PRE_PROCESSING] TO DYNGRP

GO
```

## SOP Document Pre-Processing

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

The first parameter to the SOP Pre-Processor Stored Procedure is Report Index. This unique Identifier can be used to select from the ASI12389, ASI12390, and other tables to determine which report is being printed and make decisions based the report's setup information.

The result of the ASIFP\_SOP\_DOCUMENT\_PRE\_PROCESSING Stored Procedure is evaluated by Forms Printer after each SOP Document is passed to it. If the return value is one ("1"), this indicates that the document should be included in the print run and the record is left in the SOP50200 table. If a zero ("0") is returned, Forms Printer removes the record for that SOP Document from the SOP50200 table so that it will not be included in the Print run.

### \*Important Notes

1. You must MANUALLY create the Stored Procedure in each GP Company database in which you plan to use the Statement Pre-Processing functionality.
2. The name of the Stored Procedure must be exactly as specified:  
[ASIFP\\_SOP\\_DOCUMENT\\_PRE\\_PROCESSING](#)
3. The parameters of the report must be exactly as specified in the example stored procedure.
4. You must allow execute permissions for the Stored Procedure to DYNGRP or at a minimum to those GP users that will run statements.
5. If the Stored Procedure does not exist or fails for any reason, Forms Printer will CONTINUE and the SOP Documents will be run WITHOUT applying any custom rules intended in the Pre-Processing Stored Procedure.
6. Any SOP Transaction record that does not return a 1 from the pre-processor will not have records in the SOPO50200 table.
7. In order to use the Pre-Processor correctly, your report should be based, in part, on the SOP50200 table although, you could use the Pre-Processor to call your own custom processing of records.
8. If the stored procedure exists, it will be called every time a SOP Document is printed with Forms Printer. It is up to you to properly handle the result from the proc.

## Example Stored Procedure

In the example below, when printing with Forms Printer, using a report with the name "MyCustomStatement", only the Statement for Customer Number "AARONFIT0001" will be included in the statement processing.

```
CREATE PROCEDURE [dbo].[ASIFP_SOP_DOCUMENT_PRE_PROCESSING]
@inReportIndex integer,
@SOPTYPE integer,
@SOPNumber VARCHAR(21)
AS
BEGIN
    DECLARE @Include bit = 1
    --CHECK SOME THINGS TO SEE IF @Include should be 0 (false)

    SELECT @Include =
        CASE
            WHEN @SOPTYPE = 3 then
                1
            ELSE
                1
        END

    SELECT @Include

END

GO

GRANT EXEC ON [dbo].[ASIFP_SOP_DOCUMENT_PRE_PROCESSING] TO DYNGRP

GO
```

## Post-Processing

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.

### \*Important Notes

1. You must MANUALLY create the Stored Procedure in each GP Company database in which you plan to use the Post-Processing functionality.
2. The name of the Stored Procedure must be exactly as specified: [ASIFP\\_POST\\_PROCESSING](#)
3. The parameters of the report must be exactly as specified in the example stored procedure.
4. You must allow execute permissions for the Stored Procedure to DYNGRP or at a minimum to those GP users that will run statements.
5. If the Stored Procedure does not exist or fails for any reason, Forms Printer will CONTINUE and the report process will complete WITHOUT the Pos-Processing Stored Procedure executing.
6. The Post Processor is called ONCE at the completion of the document print / delivery by Forms Printer.
7. Based on the Report Index, or ReportGroupName you can determine which temporary table contains the records delivered, and use that information in your custom post process.

## Example Stored Procedure

In the example below, when printing with Forms Printer, using a report from the "SOP\_Forms" group, a custom statement will be run and in all other cases nothing would occur.

```
CREATE PROCEDURE ASIFP_POST_PROCESSING
    @PrintingUser varchar(15), --The GP User who printed the documents
    @GPSystemDate datetime, -- The GP System Date
    @ReportIndex int = 0, --SELECT ASI_Report_Index FROM ASI12389
    @ReportGroupName varchar(255) = 0, -- See list below
    @SequenceNumber integer, --If not Zero, is Print Job Sequence number in Temp Table
    @DocType integer, -- If not zero, this is the Type ID printed in GP (SOP Only)
    @UseDeliverySystem integer, -- 1 indicates this print job was done using Deliver
    @HasEmailError integer, -- 1 Indicates at least one Error Occurred in Emailing
    @HasExportError integer, -- 1 Indicates at least one Error Occurred Exporting File
    @NumberOfEmailsCreated integer, -- Number of Emails Created by Delivery Process
    @NumberOfEmailErrors integer, -- Number of Errors during Email Delivery
    -- (which means creation NOT Outlook errors sending)
    @NumberOfDocumentsIncluded integer -- Total number of docs attached to Emails
AS
BEGIN
    DECLARE @PostProcessComplete bit = 1
    SET NOCOUNT ON;
    --Parameter
    -- @ReportGroupName VALUES
        --SOP_Forms
        --Statement
        --RM_Document
        --POP_Purchase_Order
        --PA_POP_Purchase_Order
        --PM_Remittance
        --Invoicing_Forms
        --Mnfg_QA
        --PA_Forms
    -- Insert statements for procedure here
    IF @ReportGroupName = 'SOP_Forms'
    BEGIN
        -- Possibly call an update or insert here

        SELECT @PostProcessComplete = 1
    END
    ELSE
    BEGIN
        SELECT @PostProcessComplete = 0
    END
END
GO
GRANT EXEC ON ASIFP_POST_PROCESSING TO DYNGRP
GO
```

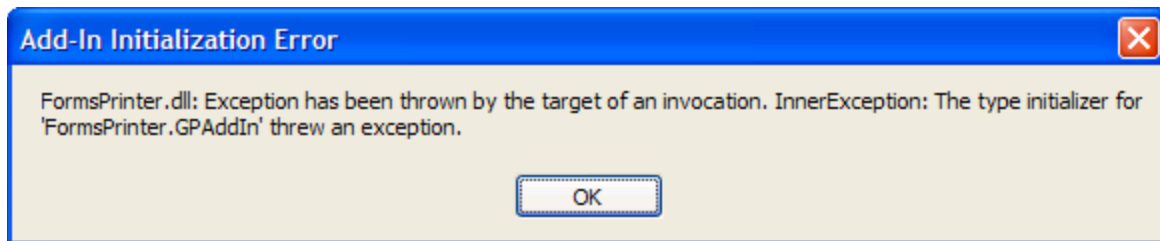
# Technical Support

## 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:

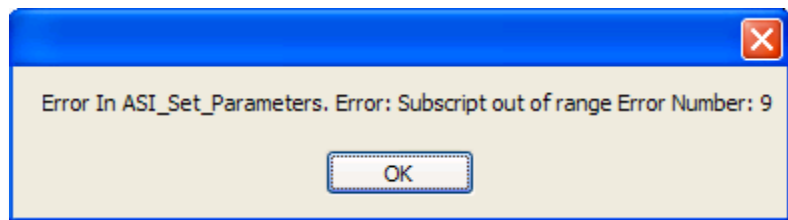
| Cause | Resolution |
|-------|------------|
|-------|------------|



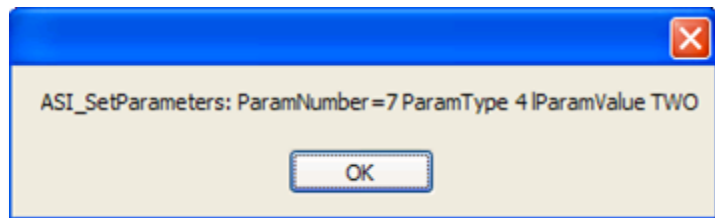
|                            |                                                                                                                                                                                                            |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.

## E-mail Setup Errors

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

The symptom, possible cause and resolution are listed below:

| Symptom                                                                                                   | Cause                                                                                                           | Resolution                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Forms Printer Setup Window either does not open or takes an unusually long time to open.                  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| OR<br><br>Error "Can't get address list object with this name from Redemption object" or similar.         | 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.<br><br>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<br><br>Some functionality of Mail delivery is restricted similar to the restrictions for Crystal MAPI. |                                                                                                                 | OR<br>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".<br><br>This option is useful when using Outlook Offline while testing or demoing Forms Printer.<br>OR<br>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<br><br>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.                                                                                                               | <p>Re-run the Forms Printer install on the workstation, ensuring the correct Forms Printer and version of Crystal Reports is used.</p> <p>Or</p> <p>Open and save the report in a version of Crystal compatible with the version installed on the workstation.</p> <p><b>NOTE:</b></p> <p>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:</p> <p>HKEY_CLASSES_ROOT\CrystalRuntime.Application\CurVer</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <p>The Crystal Reports dlls registered on the workstation do not match those installed to the Dynamics GP folder and being used by Forms Printer.</p> <p>Note that this occurs when an installation discrepancy between Crystal Reports XI and Crystal Reports XI “R2” (release 2) exists.</p> | <p>Replace the dlls in the Dynamics GP folder with the version that matches the currently registered Crystal dlls.</p> <p>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:</p> <ol style="list-style-type: none"><li>1. Find the key:<br/><b>HKEY_CLASSES_ROOT\CrystalRuntime.Application.11\CLSID</b></li><li>2. Copy the listed GUID</li><li>3. Search for that GUID under the key: <b>HKEY_CLASSES_ROOT\CLSID</b></li><li>4. When found, expand to see the folder <b>InprocServer32</b></li><li>5. Click on the folder to see the results on the right hand pane</li><li>6. Check the <b>Data</b> column value. Here will be displayed a path to the registered Crystal dlls.</li></ol> <p>If the path is:</p> <p><i>&lt;drive&gt;:\Program Files\Common Files\Business Objects\3.0\bin\craxdrt.dll</i></p> <p>Then the registered version is <b>Crystal XI “r1”</b></p> <p>If the path is:</p> <p><i>&lt;drive&gt;: Program Files\Business Objects\Common\3.5\bin\craxdrt.dll</i></p> <p>Then the registered version is <b>Crystal XI “r2”</b></p> <p>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.</p> |

## Frequently Asked Questions

**Question:** *Can I turn off the Print or Deliver or other Dialogs in Forms Printer Base System?*

**Answer:** Yes, see the [Microsoft Dynamics GP Defaults File Settings](#) section of the User Guide.

**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 E-mail using a Mail Client other than Outlook?*

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

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

## 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             |



### Project Accounting Report Mapping (continued)

|                                         |                                                      |                                                  |
|-----------------------------------------|------------------------------------------------------|--------------------------------------------------|
| 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 Format CP/FP Contract Project Level       | PA Invoice Frmt CP-FP.rpt                        |
| 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     |

**Project Accounting Report Mapping (continued)**

|                                           |                                                     |                                              |
|-------------------------------------------|-----------------------------------------------------|----------------------------------------------|
| 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           |
| 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                         |