Microsoft Dynamics NAV
(formerly known as Navision)

These are notes for typical setup. For specific setup, please refer to the user manual.

Contents
1) **General Information**
2) **Setup in Navision**
3) **PrintBoss Settings**
4) **Using PrintBoss with Navision**

Section 1: General Information
PrintBoss is an application that adds flexibility and features to the task of printing multi-part accounting documents on Laser printers. In spite of their superior print quality and speed, laser printers have introduced some new challenges with printing accounting documents. PrintBoss solves these problems by offering the following features:

- PrintBoss will print multiple copies of any document.
- Enable unique printing for each copy, such as a legend.
- Each copy can be printed in a different order, or to a different printer, or from different trays within the same printer.
- Print signatures on checks only when proper security is present.
- Print text or graphics based on conditions of the document (e.g. document amount)
- Document design can be enhanced

The PrintBoss application uses a special Windows Printer driver in order to interface with Navision. Once the appropriate settings are made in PrintBoss and Navision, sending a document to PrintBoss requires no extra steps for the user.

Section 2: Setup in Navision
Print checks to the "PrintBoss 50" printer. Do not print any other type of document to this printer.

Select the standard check form in Navision. PrintBoss is distributed with forms that match the Stub / Stub / Check style and also the Long Stub/Check style. If given an opportunity to choose a file, choose "AP Check – Laser – US.rpt", even if this is for Canadian bank accounts. (For Canadian style checks, the matching PrintBoss form, "Nav_AP2" will convert the layout properly if the PrintBoss bank account is checked for Canada.) Also, report numbers 1401 and 10401 have corresponding forms in PrintBoss. The reports are changed under Home/Actions/General Settings/Bank.

Section 3: PrintBoss Settings
The following items are suggested for Navision interfaces. This may serve as an installation checklist if problems occur. This section is broke into 3 subsections: Required Settings (these MUST be done after the initial installation), Checklist, and Other Common Settings.

A.) REQUIRED SETTINGS
File/Printer Setup
Select the driver matching the Laser Jet printer. The PCL5e is recommended when available. Do not use a Post Script (PS) driver.

DO NOT select the PrintBoss NT50 printer as the printer from the PrintBoss application.

Edit/Bank List
Beginning with PrintBoss version 5.71.1, PrintBoss includes bank Wizards to make the setup easier. Simply click on Wizards and choose 'Bank Creation'. Each screen has instructions and suggestions specific to Navision. You will be prompted to add a Logo or Signatures after the bank specific portion is completed.

PrintBoss comes with 10 bank accounts in the Standard edition. If more is needed, a Bank Key disk will need to be purchased. Call Wellspring Software, Inc., for more information.

Primary Tab:
- *Bank Code*   Enter a word or phrase to identify this bank/company combination.
- *Bank Prompt*   Enter any word or phrase for user recognition.
- *Bank Name and Address*   Fill in the bank information as it should appear on the checks.
- *Company Name and Address*   Fill in the company information as it should appear on the checks.
- *Next Check Number*   DO NOT fill in. The check number comes from Navision.
- *Confirm Check Number*   "Auto…".

MICR Tab:
- *Routing Number*   Enter the bank account routing number.
- *Account Number*   Enter the bank account number. Use a period to designate a space.
- *Check Number*   {CChkNo} or CCCCCC

Signature_Logos Tab:
This tab is used if there is a signature or logo based on a PrintBoss Bank record. For these instructions, go to our website www.wellspringsoftware.com and visit our Support Documents page.

Options/Form/Bank Request List (Standard PrintBoss only)
During installation, entries for Navision are added to this list. If there are no entries available, either run the SETUP.EXE file again as an update or import the entries by clicking on the Import button. The request list files are stored in the PRNTBOSS\REQLIST\Navision folder.

The Bank field defaults to {Request}. A bank list will appear for each check run to select a bank if this is not changed.

B.) CHECKLIST
Options/ PrintBoss Driver Settings
- *Transfer Folder/File*   {ComAppData\...\Transfer}\{WinUserName}
- *Append to Transfer File*   Do Not Check
- *Load PB32.exe*   Checked
- *Configuration Settings Save Location*   Local_User Registry (Standard)
- *Capture Mode*   Always Capture
- *PB50 Driver Special Settings/Spool Dir*   {ComAppData\...\Spool}

Click OK when finished.

Options/Configurations
Please visit our website www.wellspringsoftware.com for specific install steps if you are on a Citrix or Terminal Server environment.

Settings Tab
- *MICR offset adjustment*   Use if needing to adjust the MICR line placement. This field is work station and user specific. Default values are 0.
- *Set Globally*   Checked
- *Work File Private Folder Names*   {WinUserName}

- *Always Trigger/Capture Settings*
  - Form   {ReqList}
  - Bank   (Grayed out)
  - PB#Info Flag overrides above   Checked
  - Allow Fragmented PB#INFO line   Checked

C.) OTHER COMMON SETTINGS

Edit/Forms ... (highlight form) … Editor

Settings Tab:
- *Copies*   0 = just the original (increase to print copies).
- *Auto-Archiving*   Typically set to "Overwrite work files at start of batch". If printing copies, please refer to the manual for more details.

Multi-Part Settings Tab:
- *Print Time*   For Original set to "Immediate". If copies are set to batch, research archiving method settings to avoid lost documents. (See user manual).
- *Source Tray*   Pulls the paper from the selected tray. This is based on the current printer in the PrintBoss program. The tray names may change if the printer selection changes.
- *Destination Printer*   May be used to send designated copy to printer other than the PrintBoss default printer. This field is also used for other PrintBoss functions, such as Emailing, Faxing, and creating PDF files.

Section 3: Using PrintBoss with Navision

When printing checks, PrintBoss will open automatically. PrintBoss will open the bank list for the user to select which bank account to print from. Once a selection is made, PrintBoss will print the checks.