



Training Notes

PrintBoss FAX Service

1 August 2016

Wellspring Software, Inc., offers a Fax Service that can be used with PrintBoss from any computer that has internet access. Faxes are sent from PrintBoss through the internet to a fax data center. The data center then sends the faxes to any number in the United States or Canada. Please note that overseas faxing is not available.

ORDERING

The fax service is a PREPAID service. Order prepaid pages from our web site using your Wellspring Software web account and password. If you do not have an account, you can create one online. This same account and password must be used with the PrintBoss program to allow PrintBoss to communicate with our server. You may choose to setup an automatic re-order quantity in PrintBoss so you always have the fax pages you need. All users can share one account or you may set up individual fax service accounts for each user. To create an account:

1. Go to www.WellspringSoftware.com.
2. Click on Sign In in the top right corner of the Home page.
 - a. Enter your **Email Address** or **User Name** along with your password and click **Sign In OR**
 - b. Click the **Create New Account** link if you do not have an account
3. Select **Order Now / PrintBoss Fax Service** from the drop down menu at the top of the page.
4. Select the number of pages from the drop down menu near the bottom of the page and click **Add to Cart**. Remember, you may share fax pages with all PrintBoss users or set them up individually.
5. Check the **Auto Reorder** box on the first line and choose a **Reorder Quantity** to set automatic reorders.
6. You may also select to receive email confirmations for successful or failed faxes.
 - a. Enter the email address to receive confirmations for this account.
 - b. Select **Email on: Success** or **Failure** or both.
 - c. Click **Save** to save the email confirmation settings.
7. **Sign Out** when you are finished.

NOTE:

The price per page decreases with larger quantities of prepaid pages.


FAX SETUP

1. Open the PrintBoss Master Application.
2. Click on the **Options** menu and select **Fax Settings /Wellspring Fax Service**.
3. Fill in the following fields.

- a. **Enable Fax Service** - This check box is workstation and user specific. It must be checked for the fax service to be activated. The name at the end of the check box legend identifies the active user.
- b. **Account Information** – Enter the appropriate information for the identified user.
 - i. **Used by All PrintBoss Users** – Check this option to force all PrintBoss users to share the same account information. This is independent of Misc Settings section.
 - ii. **User Name** – Enter the User Name. This must be the same name used to Sign In to the Wellspring web site to order prepaid fax pages. In most cases, this is an email address.
 - iii. **Password** – Enter the Password. This must be the same password used to Sign In to the Wellspring web site.
 - iv. **A User Name and Password must be entered and the account queried to view the following fields:**
 1. **Log File Image Treatment** – This option determines how the log file images are treated. The default value is **Separate Files**.
 2. **Log Retention** – This option determines how long PrintBoss will keep a record of each fax.
 3. **Blank Field** – This field is above the Pack button and displays the Wellspring Software web user ID after the account is queried.
 4. **Pack** – Click this button to pack the log table. Faxes older than the Log Retention period will be deleted.
- c. ***** Fax Service Account Status** – This section lists the status of the account selected to process faxes and relates to the account created on the Wellspring Software, Inc., web site to purchase the fax pages. You may have a single account for all users or create separate accounts for each user.
 - i. **Account** – This button changes based on the status of the account.
 1. **Query Account** – Click this button to poll the Wellspring Software web site to update the fax service status for the account. This button is visible when you first enter the Fax Service window.

2. **Refresh Account** – The **Query Account** button changes to **Refresh Account** after you click on it once. Click on this button to re-poll the web site and update the fax service status for this account.
 3. **Confirm Account** – The **Query Account** or **Refresh Account** button updates to **Confirm Account** when changes are made to the Account Information section after the account has been queried at least once. This re-polls the Wellspring Software web site and updates the fax service status for this account.
- ii. **Required PrintBoss S/N** – This field displays your PrintBoss serial number after the account is queried. This field is only editable from the web site.
 - iii. **Prepaid Pages** – This field displays the remaining prepaid pages in your account after the account is queried.
 - iv. **Edit Account** – Click this button to open the Wellspring Software web site to order additional prepaid fax pages or make changes to your account settings. PrintBoss automatically logs you in to the web site based on the information in the User Name and Password fields.
 - v. **Auto Reorder Qty** – Displays the Auto Reorder quantity set up on the Wellspring Software web site. This value can only be set on the web site or by calling Wellspring Software. This field is blank until the account is queried.
 - vi. **Auto Reorder Level** – Displays the **Prepaid Pages** level when the Auto Reorder Qty will be initiated. This field only displays when the account is queried and there is a value entered in the **Auto Reorder Qty** field on the Wellspring web site. This value can only be set on the web site or by calling Wellspring Software.
 - vii. **Email Confirmations** – Displays the email address to receive confirmations for successful or failed faxes. You can choose one or both check boxes. These can only be set on the Wellspring web site by clicking on the **Edit Account** button. This information refreshes when the Query Account or Refresh Account button is selected.
 1. **OK** – Confirms a fax was successfully sent.
 2. **Failed** – Confirms a fax failed.
- d. **Misc Settings** – These fields contain options for handling faxes.
- i. **Used by All PrintBoss Users** – Check this option to force all PrintBoss users to share the same settings under Misc Settings. This is independent of the Account Information.
 - ii. **Assumed Area Code if none passed** – Enter the default area code PrintBoss should use if no area code is included with the fax number.
 - iii. **Pause prior to each fax in batches** – This feature allows PrintBoss to determine when to pause while processing faxes. There are 3 choices from the drop down menu.
 1. **Never** – PrintBoss will not pause for the fax documents.
 2. **Invalid Phone Number** – This is the default value. PrintBoss will only pause during processing when the phone number is not properly formatted (10 digits or 7 digits with assumed area code). PrintBoss cannot tell if the phone number is no longer in service. If a number is no longer in service, the fax will fail. The failure will be indicated in the Fax Service Log (see end of this chapter).
 3. **Always Pause** – PrintBoss will pause on every fax document when this option is selected. This is only recommended if your intention is to manually enter the fax number for each document.
 - iv. **Fax Header** – Edit this field to include header information at the top of each sent fax. You may use variables (items inside of braces { }) that change from document to document) as well as fixed text.
 1. A sample header is included. You will want to edit at least the company name and number in this sample.
 2. Other suggestions are provided in the drop down menu. You may edit any of these samples or create one of your own. Drag out the left or right edge of the dialog to lengthen the field and display a wider viewable area.
 - v. **Combine Pages with identical phone #s when printing batches** – PrintBoss Enterprise combines all faxes with the same phone number into one fax call when this option is selected. Only one cover page will be sent (if a cover is included). Standard PrintBoss will treat each page as an individual fax (separate call).




- vi. **Print status character of "S" (Skipped) when fax phone is blank** – Select this option to enter a capital S in the **Printed** column of the work file when there is no fax number. Faxes that fail to send for whatever reason leave an error code of "x" in the document work file. This lower-case error code prohibits the work file from being auto archived or deleted. Select this feature to allow PrintBoss to skip a fax and record a status of S in the work file. PrintBoss will treat the document as completed. The skipped record can be handled separately or ignored.
- vii. **Confirm fax success before moving Work Record to archive (or deleting)** – Select this option to prevent a document from being removed from the Work File record until the fax is confirmed as sent successfully (or has an "S" for properly skipped).
- viii. **Include Cover Page when faxing batches** – Select this option to include a cover page at the beginning of each sent fax.
- ix. **Fax Number Source** – Select the variable(s) PrintBoss uses for the fax service.
 - 1. **FaxSvcFaxNo** – This is a unique variable to assign to the fax number.
 - 2. **DocMisc** – This variable is sometimes used for other data. It may be best to only select the FaxSvcFaxNo variable if you are not sure you are using DocMisc for something else.
- x. **Log File Poll Period** – Select the interval (in minutes) PrintBoss polls the web site for updates on the fax sent status. The default value is 4 minutes. The status can be viewed on the **Fax Service Log** under the **Utilities** menu.
- xi. **FaxService Comm. Method** – Set this option to **Standard Service** unless directed to change by a Wellspring Software, Inc., technician.
- e. **Cover Page Fields Default Values** – These settings apply to cover pages included with faxes unless their values are overwritten specifically in the PrintBoss Form File.
 - i. **Cover Page Fields used by all PrintBoss Users** – Check this option to force all PrintBoss users to share the same **Cover Page** settings.
 - ii. **Cover Page File** – Select a cover page file.
 - 1. PrintBoss includes a sample cover page that may be used as a default.
 - 2. The document selected here is used as the cover for all faxes unless an alternate cover is specifically designated in the PrintBoss Form File. Usually this is a Text (txt) document with variable names that are filled at print time.
 - 3. Alternate cover pages can be saved in the {PBDDir}\FaxService\Cover Pages folder and accessed with the Open  button at the end of this field.
 - iii. **Text Edit** – Select this button to edit the Cover Page File using Notepad.
 - iv. **To** – Enter the appropriate variable for the *To:* name. The default value is {DocRecip}. This may be overwritten by values set in a PrintBoss Form by assigning the FaxSvcCvrTo variable.
 - v. **From** – Enter the appropriate value for the *From:* name. Typically this is your company name and is typed in the field. This may be overwritten by values set in the PrintBoss Form by assigning the FaxSvcCvrFrom variable.
 - vi. **Re** – Enter the appropriate value for the *Re:* subject. Text or variables may be used in this field. This may be overwritten by values set in the PrintBoss Form by assigning the FaxSvcCvrRe variable.
 - vii. **Cover Page Message** – Enter a default message included on the cover page (if a cover page is included). You may edit this message or delete it and enter one directly on the Cover Page File. This field may be overwritten by values set in a PrintBoss Form by assigning the FaxSvcCvrMsg variable. #Assigns is preferred over #Assign when multiple lines are assigned.
 - viii. **Company Name/Address** – Enter the appropriate default values for your company in these fields.
 - 1. Leave a field blank if you do not want to use it.
 - 2. These fields are referenced by the PrintBoss default Cover Page. You may edit the cover page so it does not reference these fields or enter the information directly into the cover page.

3. These fields may be overwritten by values set in a PrintBoss Form by assigning the following variables:
 - a. FaxSvcCvrCompany
 - b. FaxSvcCvrAds1
 - c. FaxSvcCvrAds2
 - d. FaxSvcCvrAds3
 - e. FaxSvcCvrPhone
 - f. FaxSvcCvrFax
- ix. **Test Fax Number** – Enter the number of a local fax machine to test the fax. Most often this is an inbound fax number in your office so you can verify the layout of the fax or cover page. Include the area code if it is different from **Misc Settings / Assumed Area Code**.
4. **Test Fax Settings** – Click the **Send Test Fax** button . The **Fax Service Send** dialog opens.
 - a. You may edit most of the fields before clicking the **Send Fax** button at the bottom of the dialog.
 - b. The fields display the values entered in the Cover Page Fields section when the **Cover Page Fields Default Values** checkbox is selected. Otherwise, you can type any values in the fields provided.
 - c. Click the **Send Fax** button to test the fax settings. The result will appear in the **Fax Status** section at the bottom of the page.
 - d. Sent test faxes count toward your prepaid pages.
5. Click **OK** to save changes made to the Wellspring Fax Service Options dialog.

FORM SETUP FOR FAXING

The PrintBoss Fax Service feature is enabled on a form-by-form basis. This only takes a few steps:

1. Open the PrintBoss Master Application.
2. Click on the **Edit** menu and select **Form Files**.
3. Highlight the form you want to fax and click the **Editor** button.
4. Increment **Copies** by one on the **Settings** Tab. This new copy will be treated as the fax copy.
5. Select the **Multi-Parts & Printers** tab.
6. Set the **Destination Printer/Device** for the new copy to **< Fax Service>**. A fax button  will appear at the top of the View for this form.



See Chapter 9, *Form Files*, for more information on Modify from the Document View.

7. Click **OK**.


FAXING

Printing documents from the accounting software proceeds as normal. Typically, the document *Original* and *Copy* are set to print/fax immediately. Unlike faxing through a local modem, there is no delay in the fax service process. The faxes are sent out immediately through the internet. It may take 1 to 10 minutes for the fax to be sent from the fax service.


When the **Print Time** on the Multi-Parts & Printers tab of the Form Editor is set to **Batch**, documents can be faxed manually from the View or directly from the Work File. See *Manual Fax on Demand* below for step-by-step instructions on faxing from the Work File.

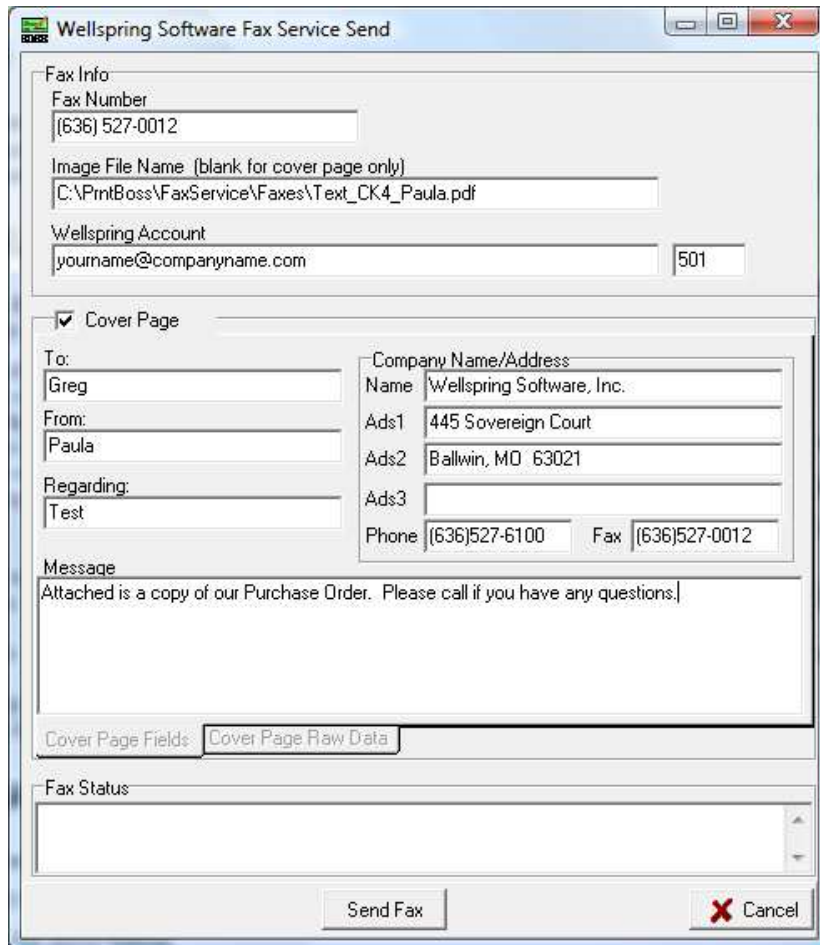
MANUAL FAX ON DEMAND

When **Enable Fax Service** is checked at the top of the Fax Service Options dialog, all document Views will have a

Fax button  at the top of the window near the Close button.

1. Open the PrintBoss Master Application.
2. Click on the **File** menu and select **Open Document Work Files** or **Open Document Archives**.
3. Highlight the desired work or archive file and select **Browse**.
4. Select the appropriate document from the list. There are two ways to proceed from this point.
 - a. Click **View**.

- i. Click on the **Fax** button  to manually send this document. There is a short delay while PrintBoss creates the cover page. The **Wellspring Software Fax Service Send** window opens.



Wellspring Software Fax Service Send

Fax Info

Fax Number
[636] 527-0012

Image File Name (blank for cover page only)
C:\PrintBoss\FaxService\Faxes\Text_CK4_Paula.pdf

Wellspring Account
yourname@companyname.com 501

Cover Page

To: Greg
From: Paula
Regarding: Test

Company Name/Address
Name: Wellspring Software, Inc.
Ads1: 445 Sovereign Court
Ads2: Ballwin, MD 63021
Ads3:
Phone: (636)527-6100 Fax: (636)527-0012

Message
Attached is a copy of our Purchase Order. Please call if you have any questions.

Cover Page Fields: Cover Page Raw Data

Fax Status

Send Fax Cancel

- ii. Enter a number in the Fax Number field if it is blank (default).
 1. A fax number will appear if either the *DocMisc* or *FaxSvcFaxNo* variables are assigned in the PrintBoss Form.
 2. These assignments can be static (same value for all documents using this form) or dynamic. Dynamic variables capture a value for each document.
- iii. Check the **Cover Page** option to include your default cover page.
- iv. Click **Send Fax** when you are finished.
- v. Click **Close** to close the View.

- b. Click **Print**.
 - i. Select **Allow Reprints**.
 - ii. Select the copy identified as **<Fax Service>**.
 - iii. Adjust the Scope to include additional documents if desired.
 - iv. Click **Print Start** to send the fax(es).
 - v. Click **Close** to close the Print Copies Dialog.
5. Review the File Browse table. The **Printed** column displays a capital X when the fax is sent successfully. A small case x displays when the fax was not sent successfully and an S may appear if the fax was intentionally skipped.
 - a. Right click on a document and select **Edit** to view the **Status Log**.
 - b. The Status Log records both e-mail and fax activity. Example:

10/09/2009 10:15:27A Copy=1 Faxed Successfully.
 - c. When the fax is still pending at the fax server, there will be a slash (/) in the Printed column of the Work File.

ASSIGNMENTS

Assignments can be either Static or Dynamic. An explanation of these choices follows.

Static Assignments

Assign static values to the DocMisc or FaxSvcFaxNo variables to set a single fax number for ALL sent faxes. For example, the office manager may need a copy of all invoices. The invoice form may contain an entry similar to the following:

```
#Assign FaxSvcFaxNo, "555-555-1212"
```

These assignments must be made in the Runtime Objects tab of the PrintBoss Form (EDIT / FORM FILES / <highlight the PrintBoss Form> / EDITOR).

Dynamic Assignments

Dynamic assignments are the heart of automatic faxing. There are 2 ways to create a dynamic assignment. Use one method or the other, not both.


INCLUDE IN SOURCE REPORT


Modify the *PrintBossMisc* formula to represent the fax number variable in the source report if there is a PrintBoss Trigger. It is important the format of the formula includes the area code.

PICKED OFF OF CAPTURED REPORT BY PRINTBOSS

This method requires the recipient's fax number is displayed somewhere on the source report. PrintBoss can capture this information and blank it out (if desired).


1. Print a document to PrintBoss containing a fax number.
2. Click on the **File** menu and select **Open Document Work Files** on the PrintBoss Master Application.
3. Select the appropriate form and click **Browse**.
4. Select a document and click **View**.
5. Right-click anywhere in the View and select **View Raw Capture**.
6. Locate the fax number on the page. Double click on the text to open up the **Captured Text Command Properties** dialog.
7. Select the **Click to Assign to Variable** bar on the top right of the dialog.
8. Change the **Variable Name** from ReNameMe to **FaxSvcFaxNo**.
9. Check the following fields:
 - a. Add together fields in horizontal range
 - b. Capture Raw Text Objects Only

- c. Left Trim
 - d. Right Trim
 - e. Blank Out After Capture (optional – hides fax number on printed document)
- ✓ **Some reporting engines (such as certain versions of Crystal Reports) tend to break up text fields. A good practice is to click on the +/- button that follows the *Horizontal* field so it becomes *to*. Set the ending coordinate far enough to the right to pick up a 10-digit fax number.**
10. Click **OK**. PrintBoss adds this assignment to the top of the RunTime Objects tab in the Form.
 11. Right-click on the page and click on **View Raw Capture** to return to the formatted document.
 12. Click the **Fax** button  on the top right corner of the View to test the assignment. The Fax Service Send dialog displays the address fields filled with the assigned values.
 13. Click **Send Fax** to complete the test.
 14. Click **Close** to exit the View.

 See Chapter 23, *Capturing and Assigning Text*, for more information.

VARIABLES

There are several variables that may be Assigned in a Form File to define values for the cover page and fax number.

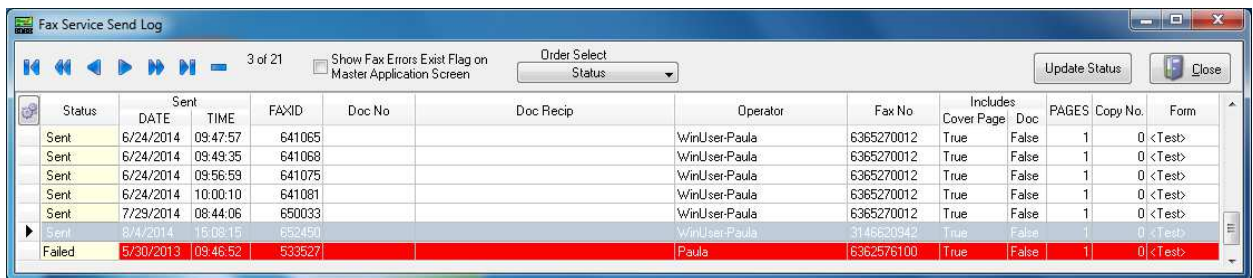
 See Chapter 9, *Form Files*, for more information on Assignments.

A list of the fax service variables and their purpose is included in Appendix E of this manual.

FAX SERVICE LOG

PrintBoss keeps a log of the faxes sent through the Fax Service. The **Fax Service Send Log** indicates the Status of the fax, Date and Time the fax was sent, the name of the PrintBoss user (Operator) who sent the fax, the name of the PrintBoss Form used to send the fax, if a Cover Page was included, and the number of Pages sent. This is the number of pages that will be deducted from your account. The log also displays the Document Number and Recipient of the fax if a Fax Service variable is defined.

1. Open the PrintBoss Master Application.
2. Click on the **Utilities** menu and select **Fax Service Log**.



Status	DATE	TIME	FAX-ID	Doc No	Doc Recip	Operator	Fax No	Includes Cover Page	Doc	PAGES	Copy No.	Form
Sent	6/24/2014	09:47:57	641065			WinUser-Paula	6365270012	True	False	1	0	<Test>
Sent	6/24/2014	09:49:35	641068			WinUser-Paula	6365270012	True	False	1	0	<Test>
Sent	6/24/2014	09:56:59	641075			WinUser-Paula	6365270012	True	False	1	0	<Test>
Sent	6/24/2014	10:00:10	641081			WinUser-Paula	6365270012	True	False	1	0	<Test>
Sent	7/29/2014	08:44:06	650033			WinUser-Paula	6365270012	True	False	1	0	<Test>
Sent	8/4/2014	16:08:15	652450			WinUser-Paula	3148620342	True	False	1	0	<Test>
Failed	5/30/2013	09:46:52	533627			Paula	6362576100	True	False	1	0	<Test>

The log **Status** indicates whether a fax is pending, sent, or failed. The frequency of the status updates is determined by the **Log File Poll Period** defined on the Wellspring Fax Service Options dialog.

3. Click the **Update Status** button at the top of the Fax Service Send Log to manually update the log.
4. Select **Show Fax Errors Exist Flag on Master Application Screen** to display failed faxes in red text in the lower left of the Master Application screen.



Right click on the red text to view options such as resend the fax or abandon the record.

5. Right click on a record to view a list of options for handling the record. The options include:
 - a. Abandon Failed Record
 - b. Resend
 - c. View Cover Page
 - d. View Body Page(s)
 - e. Delete Record
6. Click on the **Order Select** drop down menu to choose a sort order for the log.
7. Click on **Close** when you are finished.