

## SETUP

PrintBoss can fax documents using a computer's **local** fax modem board.

- Often there is confusion when a fax server is available to a PC. The purpose of the PrintBoss Fax is to fax to a local fax device. A fax server is a completely different situation. Normally, it appears to Windows applications as a printer driver. It has its own methods for determining the fax send number. If you want PrintBoss to print to a fax server, simply identify the fax server as the Destination Printer for one of the copies of a form. You will need to refer to the fax server documentation to determine how the server expects to assign a fax number.
  - An alternative to using your own fax equipment is to use the Wellspring Fax Service described in the PrintBoss Fax Service training notes. The Fax Service allows faxing from any PC with an internet connection and does not require additional hardware.
1. Open the PrintBoss Master Application.
  2. Click on the **Options** menu and select **Fax Settings / Local Fax Device**. The PrintBoss **Fax Configuration** window opens.



**NOTE:**

The configuration fields are saved locally by User and PC.

3. Fill in the following fields.
  - a. **Fax Class** – This should normally be Auto Detect.
  - b. **Station ID** – Enter the number of the inbound fax machine in the office.
  - c. **"Busy" Retry Count** – Enter the number of times PrintBoss will attempt to redial when the fax line is busy. Normally, the retry count is 3.
  - d. **Dial Prefix** – Enter the dial prefix to dial outside the office if one is required. Otherwise, this field is blank.
  - e. **Seconds till Busy Retry** – Enter the number of seconds PrintBoss will wait before redialing if the fax line is busy. Normally, this is set to 30.
  - f. **Modem Initialization String** – This field is normally blank.
  - g. **Connection Wait** – Wait time, in seconds, to make a connection.
  - h. **Alternate Dithering** – This is normally left blank.
  - i. **Fax Header** – Select a fax header string to print at the top of the fax page. Choose a string from the drop down menu or create your own using the special variables listed below.
    - i. \$I = Station ID
    - ii. \$D = Current Date
    - iii. \$T = Current Time
    - iv. \$R = Recipient
    - v. \$F = PrintBoss Form
    - vi. \$S = Document Number
    - vii. \$P = Current Page
    - viii. \$N = Total Pages
  - j. **Fax Resolution** – This field should be set to High or Standard.
  - k. **Selected Device** – PrintBoss should recognize your TAPI compliant fax/modem and display the name in this field.

- l. **Treatment of Fax Errors** – This option directs PrintBoss to either pop up an error message or continue faxing the next document with no error message. Normally, this field is set to **Don't show errors**. The *Popup Error Messages* option is often used for testing.
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  - m. **Combine pages with identical phone #s when printing batches** – This option directs PrintBoss Enterprise to compare all the documents in a batch to determine if any of the fax numbers are identical. All documents with identical fax numbers are sent in one fax call.
  - n. **Print Status character of "S" (Skipped) when fax phone is blank** – Check this option to skip a document when the fax number is blank and continue with the next document. PrintBoss will enter a capital S in the Printed column of the Work or Archive file to indicate the record was skipped and not faxed. The error will be recorded in the Status Log of the Work File Edit window for the document.
  - o. **Wait for dial tone before dialing** – Check this option to force PrintBoss to wait for a dial tone from the fax modem before it begins dialing.
  - p. **Force Baud Rate (Special cases)** – This option is used only by the instruction of a Wellspring Software technician.
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    - q. **Treatment of landscape forms** – Choose to print landscape forms either as a Compressed Portrait or as a full Landscape.
    - r. **Left margin** – The default setting is 40. Do not change unless instructed by a Wellspring Software technician.
    - s. **Page Width** – The default is 1660. Do not change unless instructed by a Wellspring Software technician.
    - t. **Fax Text**
      - i. **Test File** – This field displays the path and file name of the test fax. Use the Open button to select a new test fax file. Every page faxed is converted to a pfx file in the Fax subdirectory. One of these pages can be renamed and used as a test fax.
      - ii. **Fax Test Phone Number** – Enter the number of a local fax machine to test the fax. Most often this is an inbound fax number in your office.
    - u. **Cover Page** – Select the **Cover Page** check box to use or edit the following options.
      - i. **Cover Page File** – PrintBoss has a default fax cover page. It is stored in the FAX subfolder of the PrintBoss Home directory. Use the Open  button to select a cover page you created. Custom cover pages should be saved in the PrintBoss Fax subdirectory.
      - ii. **Cover Page Font if Text File** – Click on the Font  button to change the font, size, and style of the text file listed in the **Cover Page File** field.
      - iii. **Edit Cover** – Select the **Edit Cover** button to open and edit the text file listed in the **Cover Page File** field.
      - iv. **Cover Test** – Select the **Cover Test** button to fax a test of the cover page to the number entered in the **Fax Text Phone Number** field.
      - v. **Log File Active** – Select the **Log File Active** check box to create a log for the documents faxed. PrintBoss saves the log to the default path and file name listed in the field. Use the Open button to select a different path and file name.
        - i. **Clear Log** – Click this button to clear the existing log, deleting any previous fax logs.
        - ii. **View** – Click this button to view and edit the fax log.
4. Click **OK** to save your changes.

## TESTING

It is helpful to enter the number of the local fax machine in the **Fax Test Phone Number** field to test the fax option. Click the **Fax Test** button to fax the .pfx file shown in the **Test File** window. Check **Cover Page** to include a cover page. The cover page can be tested separately by clicking the **Cover Test** button. This will fax the file shown in the **Cover Page File** field. A sample test page file (FaxTest.pfx) and a sample cover page file (Cover.txt) are included with PrintBoss.

## FORM SETUP FOR FAXING

The PrintBoss fax 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 **<PrintBoss Fax>**. A fax button will appear at the top of the View for this form.



See Training Notes entitled *Form Files* for more information on Modify from the Document View.

7. Click **OK**.

## MANUAL BATCH FAXING

Printing documents from the accounting software will proceed as normal. Typically, the document *Original* and *Copy* are set to print/fax immediately. You may prefer to send the fax at a different time after the document is printed from the **HAS**. For example, a batch can be faxed at the end of the day.

1. Follow the first three steps under *Form Setup for Faxing* above.
2. Select the **Multi-Parts & Printers** tab.
3. Locate the fax copy and set the **Print Time** to **Batch**.
4. Click **OK** and close the Form Select window.
5. Print documents from the accounting software.
6. Click on the **File** menu and select **Open Document Work Files**.
7. Select the appropriate work file and click **Browse**. The File Browse window opens.
8. Highlight the document you need to fax. Right-click on the document and choose **Edit**.
9. Type the full fax number in the **Misc. (Fax Number)** field of the **Work File Edit** window. The 1 and the area code need to be included if the fax number is long distance. **DO NOT** include a prefix to access an outbound line. The Status Log at the bottom of the window will note the success or failure of the fax. Unsuccessful faxes will include an explanatory note.
10. Click **OK** when finished to return to the File Browse window.
11. Click on the **Print** button while the document is still selected. The **Print Copies Dialog** opens.
12. Check the Copy labeled **<PrintBoss Fax>** to select it.
13. Verify the report name and range under the **Scope** section. The **End** value should equal the number of documents in this record if you are sending a fax for each document. The total number of records for this batch is displayed at the top of the Print Copies Dialog. Click the **All** button to the far right of the Scope to select all of the records.
14. Click the **Print Start** button in the top right corner of the dialog to begin faxing. A capital F will be entered in the *Printed* column of the File Browse window when the fax is successful. A lower case f will appear if the fax did not send successfully. Open the Work File Edit window to view explanations for failed faxes.

## AUTOMATIC FAXING

Faxes can be sent automatically when PrintBoss receives the fax number from the accounting software. There are two ways PrintBoss can receive fax numbers from the accounting software:

1. Assign the fax number to the **PrintBossMisc** field of the PrintBoss Trigger formula in the accounting software crystal report. This method is used when the **Capture Mode** for the PrintBoss Driver Settings

under the Options menu is set to **Flag Trigger**. Review the *Installation Notes* specific for the accounting software setup for more information.

2. Assign the fax number captured from the accounting software data to the **DocMisc** variable in the form. This method is used when the **Capture Mode** for the PrintBoss Driver Settings under the Options menu is set to **Always Trigger**. Review the *Installation Notes* specific for the accounting software setup.



See Training Notes entitled *Form Files* for more information on Assignments.