

Advanced Business Manager Pty Ltd



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Support Bulletin # 65 ABM Printer Form Settings and ADH

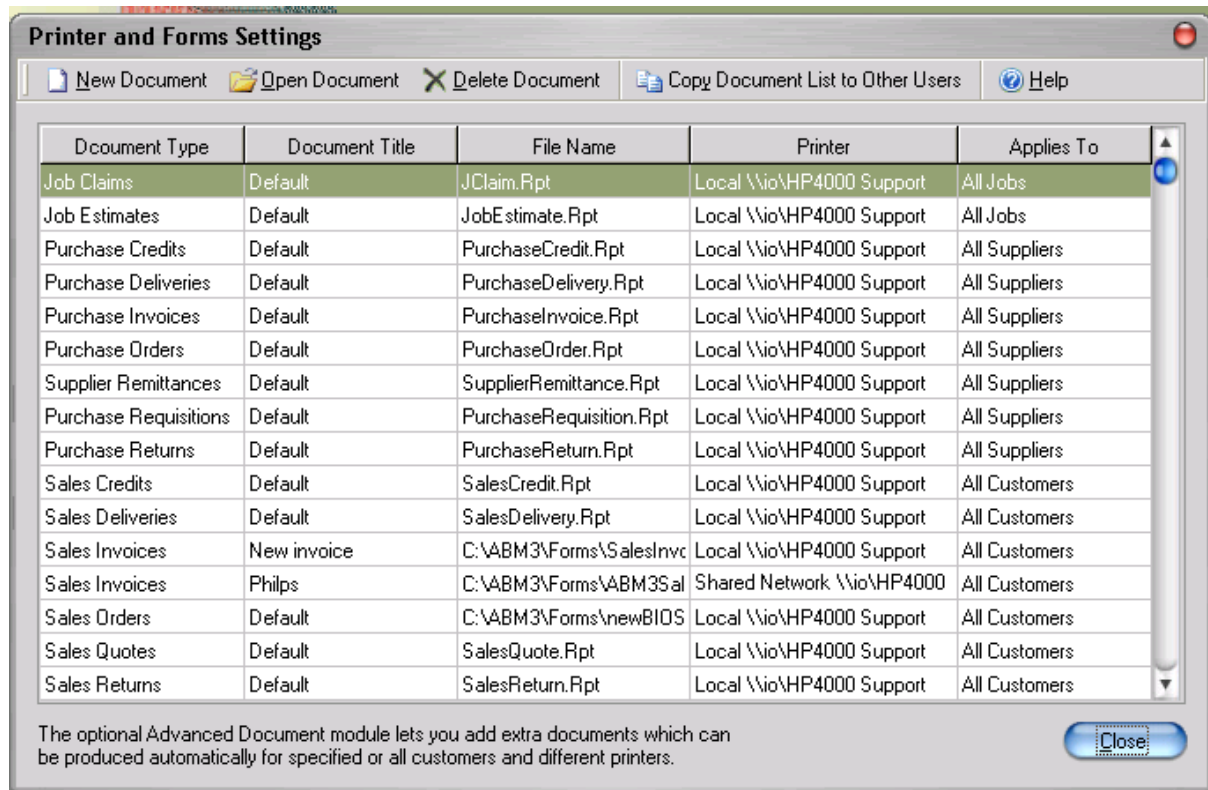
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Printer and Form Settings in ABM

When you initially install ABM, default forms will already be set up, and the printer settings will be set up for your default printer. In Version 3.05 of ABM forms can originate from the Z tables or the Transheaders/Transdetails table.

You can change the Printer and Forms by selecting "Printer & Forms Settings" from the menu. Select File and select Printer & Form Settings. The following screen will appear.



Options Available:

- **New Document:** If you have registered Advanced Document Handling, you can add new document types to suit different needs of the business.

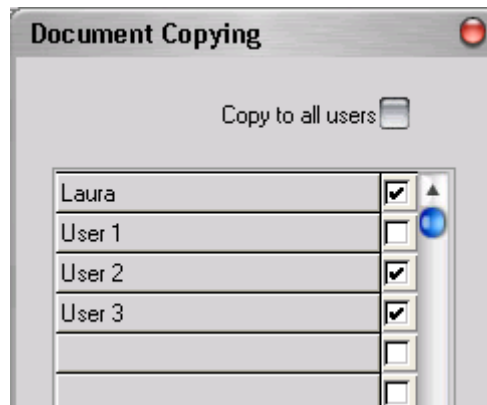
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- **Open Document:** You can change the Form settings by selecting the required Form, and selecting Open Document. This will allow you to change the selected physical form, as well as the printer. You can also set the number of copies required. If you have registered Advanced Document Handling, you can change the printing parameters of the document. Example if you wish to have the document only printed for a specific group of customers then you can select Applies To.
- **Delete Document:** If you wish to remove a document then select the required form and select Delete.
- **Copy Document List to All Users:** If you have set up new forms, you can then copy all these new forms to other users, so that they are available throughout the organization.



Maintaining Existing Documents

You can change the criteria for handling your documents by selecting Printer & Forms Settings and selecting New Document. This will open the document Maintenance screen.

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A screenshot of the 'Document Maintenance' dialog box. It contains several fields and dropdown menus: 'Document Name' (Default), 'Type of Document' (Sales Order Confirmations / Picking Lists), 'Produce for' (All users), 'Applies to' (All customers), 'File Name' (C:\ABM3\FORMS\newBIOSalesOrde) with an 'Edit this Form' button, 'Send document to' (As shown in the Customer's account), 'If printed, send to' (Each user's local printer) with a 'Local Printer Settings ...' button, and 'No. of Copies' (1). A note at the bottom states: 'The forms selected for individual workstations can be changed by using the Forms Settings menus in the transaction programs'. 'OK' and 'Cancel' buttons are at the bottom right.

Document Maintenance screen.

Steps in Changing a Document:

- **Document Name:** You can change the name of the document to make its identification more applicable to its use. Example Retail Sales Invoice. Note: you can not change the Default forms unless you have registered ADH and have set up another form which would apply to all other customers, suppliers or jobs.
- **Produce For:** You can change the document to only apply to your user name, or for all other users.
- **Applies to:** You set the criteria for selecting this document when printing. The options available are:
 - **All Customers, Suppliers or Jobs:** Depending upon the type of transaction the form applies to you can set to document will be available for all customers, all suppliers or all jobs.
 - **A Specified Customer, Supplier or Job Only:** If you wish to create a form specifically for one customer, a specified supplier, or a specified job then select this option and select the required customer, supplier or job. Example if you set up a sales invoice form specifically for one customer then it will select this form when you process a sales invoice to this customer as opposed to the default form.
 - **A Specified Group:** You can restrict the printing of this document to a specific group. Select either customer, supplier group or job group depending on the form type selected. Example: if the form applies only to Retail Customers then select Customer Group and select the Group Retail. If you have created a sales form then each time

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you process a sales invoice to a customer belonging to that group that particular form will be used.

- A Specific Category: You can select the form to be selected when a transaction is processed and the customer, supplier or job is associated with a particular category. Example: if you wish to use a particular sales form for customers in Category Foreign then select that category and this document would only be used if that customer meets that criteria.
- Form Name: Browse and select the required path and form to match the criteria entered.
- Send Document To: You can select how you want the document to be sent as follows:
 - As Shown in the Customer, Supplier or Job Account. When you setting up a customer account you would have specified how various documents were to be printed such as On Paper, By Email etc. the document will then be sent in accordance to this criteria.
 - Always Print to the Printer Below. You can specify a printer so that these documents will always go to this printer. Example: if you wish to have delivery dockets printed in the stores department then select that specific printer.
 - Always E-mail to: You can enter an E-mail address so that this document is always sent by E-mail to the specified E-mail address.
 - Always E-Mail to the Customer or Supplier account. This will always E-mail the document to the accounts contact set in you customer or supplier contacts list.
- If Printed Send To: You can select either a local printer of a shared network printer. Select either of these options and then select the required printer.
- Number of Copies: You can select the number of copies to be printed each time this form is selected. **Note:** If you select Supplier Cheques/Remittance Advices as your type of document, you may then select the number of lines to be printed on each remittance page.
- Display Form Selection when Printing: If you have more than one Form Type then an option will be visible allowing you to decided if you wish to have these forms display and available for selection when you are printing a document.

Creating a New Document

If you have a licence for ADH you can create new document types such as additional Sales Invoice forms and define how these forms are handled by selecting Printer & Forms Settings and selecting New Document. This will open the document Maintenance screen.

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Document Maintenance screen.

The options here are exactly the same as the Changing an existing document, the only difference being that you are able to create multiple documents for one event in ABM.

Supplier Cheques/Remittance Advices

If you wish to print combined remittances and cheques, select Supplier Cheques/Remittance Advices from the drop-down list as your type of document. When you have selected this form you will have the option of entering the number of line items to be printed on the remittance together with the next cheque number.

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Advanced Document Handling

Advanced Document Handling (ADH) provides a powerful tool for printing, emailing, previewing and exporting multiple documents (Forms) from an easy-to-use interface.

Advanced Document Handling supports printing of numerous transaction types and enables easy management of documents and control over the availability of documents to specific users for the individual companies they have access to.

Features supported by Advanced Document Handling are:

- One-Off Documents ADH supports the printing/re-printing of documents from ABM on a “one-off basis”. This allows for tasks such as invoices to be re-printed using a different layout to the original.
- Business Partner Specific Documents You can set up a Form type that will be printed for a specified purpose such as a specific Customer or Customer Group. Example if you need to send a particular design of invoice to a specific customer including specific information you can set this form for that customer and the customer will receive their document in this format all the time.
- Email Format Selection Documents can be set to be email to a specific address if required together with the format type of Documents which are intended to be emailed can be selected from a range of standardised formats. Example if all delivery dockets are to be printed for dispatch but also e-mailed to a Head Office account at the same time then you can set up to form types for this event one form to printed and the other form to be e-mailed
- Printing Multiple Documents ADH allows its user to print multiple documents at the same time. The user can setup documents to print according to a Customer/Supplier so that when

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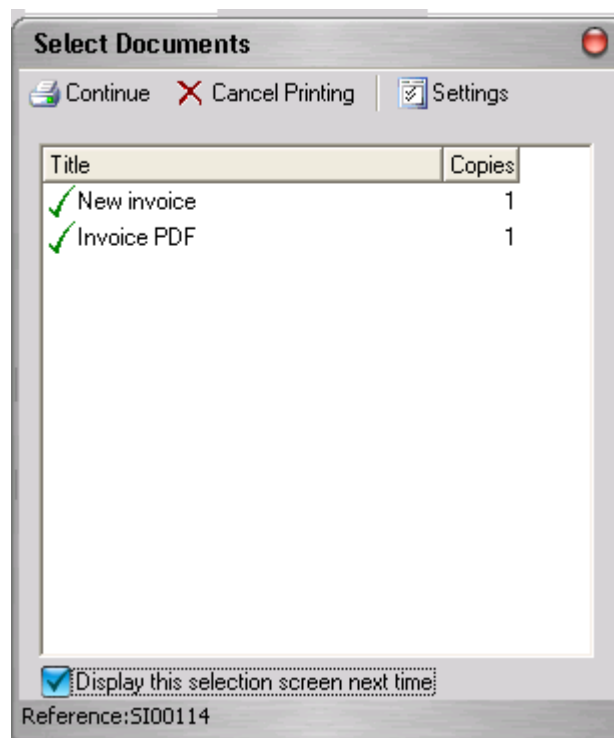
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an invoice, for example, is processed then the user can print different documents at the same time.

- Printing to Many Destinations ADH allows users to print/reprint one document simultaneously sending it to a number of destinations. This means that the user can specify a document to be sent to the business and home printers at the same time if they wish.

Printing Documents with ADH

If you have more than one Form Type set up you can select all forms when printing or select an individual form or a combination.



Selecting Documents

When you select the Print when Saving option the Select Documents screen will appear, and allow you to select all documents, or a particular document. If you do not wish to include a document for printing, double click on that document, which will then have an X associated with it, and that document will not be included for printing. When you have made your selection select *Continue* to print your documents.

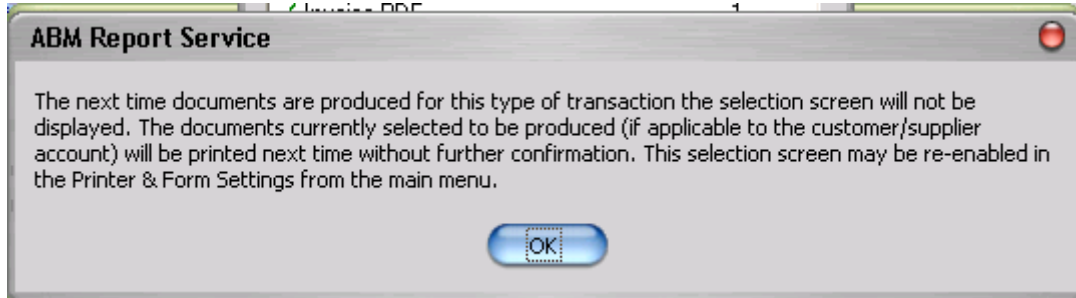
Display this Screen Next Time: If you unselect this option then the Select Documents screen will not appear the next time you product this transaction type. Example if you are printing sales invoices and you do not wish to have the selection screen appear when printing then unselect this option and the next time you print a sales invoice it will print the documents you have selected without requiring your confirmation. When you disable this option the following prompt will appear

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Note you can turn this option back on again by selecting Printer and Forms settings and selecting the particular form.

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