PrintBoss Setup

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Use the following to set up PrintBoss software for check printing in Agvance.

Note: For more information on PrintBoss, see the **Check Printing Options** document or contact SSI at 1-800-752-7912.

Hosted Server Install

SSI IS will install the **Wellspring Software - PrintBoss** once the agreement with PrintBoss has been signed (this includes standard templates).

- **Currently Hosted** – Submit a Support Ticket for SSI to install PrintBoss software and standard templates.
- **New Customers** – The implementation team will assist with this process and a Support Ticket will be submitted to have the SSI IS team install PrintBoss and standard templates.

Note: Once PrintBoss has been installed, work with PrintBoss directly for custom templates and support.

Printing Checks from Agvance

PrintBoss will show up in the list of printers in Agvance. Default check printers can be selected in the following places in Agvance:

- **Quick Check Printer** – *Accounting / Setup / Preferences* on the *G/L* tab
- **AP Check Printer** – *Accounting / Setup / Preferences* on the *A/P* tab
- **Payroll Check Printer** – *Accounting / Setup / Preferences* on the *Payroll* tab
- **Patronage Check Printer** – *Patronage / Setup / Preferences*
- **Grain Check Printer** – Choose *PrintBoss* on the *Check* tab after saving a Settlement

PrintBoss will automatically detect the type of check being printed and will choose the correct template. The only exception to this is Patronage Demand Notes; if the patron's social security number is not set to print on checks, PrintBoss will display a window to choose the correct template.

Ordering Forms and Toner

PrintBoss recommends printing on blank check stock, but some companies are more comfortable with a degree of pre-printing on their forms. Also, a special toner cartridge may be required to print the MICR encoding if this is not pre-printed. Ask the bank if they require MICR toner. Contact SSI at 1-800-752-7912 to order any type of check forms or the MICR toner.

Please note that the PrintBoss default check looks very different from Agvance style checks so, when ordering forms, it is important to specify that PrintBoss is being used.

Logos

Logos can be set up within the PrintBoss software to print on the fly, or can be pre-printed on check forms. Discuss with your forms provider to determine the best option for your company.

Technical Support

SSI does not provide technical support for the PrintBoss software. See **PrintBoss Support** for help installing PrintBoss or setting up the Agvance templates.

Custom Check Templates

Wellspring Software can provide check templates to match just about any desired check format. The default Agvance templates are provided at no charge and will be updated by Wellspring any time a change is made to the Agvance check printout.

For a different style check, work directly with Wellspring Software to order a set of custom check templates. The fee for a custom template will not be covered by SSI and the template will not be automatically updated to handle any changes to Agvance.

On Premise Server Install

Follow these instructions to install PrintBoss:

1. Download the software from the Wellspring Software web site at **Wellspring Software - PrintBoss**. Save the *setup.exe* file to the computer where PrintBoss will be installed.
2. Double-click *Setup.exe*. The *PrintBoss Destination Selection* window will open.
    a. Select *Custom* from the *Host Accounting System* drop-down menu.
    b. Enter the path where PrintBoss should be installed in the *PrintBoss Home Directory* field. Leave *PrntBoss* as the folder name.
    c. *Install Type* defaults to *New Install*.
3. Choose **Next**.
4. On the *PrintBoss Registration* window, enter the registration information provided with the order confirmation email along with all other requested fields.
    - Enter *SSI* for the *Dealer*.
    - Enter *Agvance* for the *Acct. Soft*.
5. Choose **Next**.
6. Choose **Next** after reading the license agreement.
7. Select *Online Activation*, then choose **Next**.
8. Keep all defaults, then choose **Next**.
9. Keep all defaults, then choose **Next**.

Once PrintBoss is installed on a server, client links can be installed on the local workstation.

1. From the local workstation, navigate to the *PrntBoss Home Directory*.
2. Double-click *Setup.exe*. The information is all filled in and the *Install Type* will default to *Workstation / Printer Driver / Special Host Tasks*.
3. Choose **Next**.
4. Choose **Finish**.

Users must have Full Control of the PrintBoss Home Directory as well as the *Transfer* and *Spool* folders located on the local workstation. The locations for the *Transfer* and *Spool* folders can be found by opening the PrintBoss application (*PB32.exe*) and selecting *Options / PrintBoss Driver Settings*. The location varies by operating system. The PrintBoss manual and other resources can be found under *Resources / Help and Support* at **Wellspring Software**.

Install Templates

Agvance customers have access to a set of default PrintBoss check templates designed to work with all Agvance check types.

To add the Agvance check templates, download **PrintBoss Templates** . Copy the extracted files and paste them on the launched PrintBoss Master Application. PrintBoss will save them to the correct location. In addition, the *Form / Bank Request List* entry needs to be imported as follows:

1. Open the PrintBoss Master Application.
2. Choose the *Options* menu and select *Form / Bank Request List*.
3. Choose **Import** and select the request list entry.
4. Select **Open**. The new entry will appear at the bottom of the list.
5. Repeat if using more than one Agvance form.

Choose **Close** to save this change.

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Canadian Bank Setup

If any banks require Canadian style checks, there is a setting that must be changed in PrintBoss. To check if a Canadian bank is properly set up:

1. In the PrintBoss program, go to *Edit / Bank List*, edit the bank, and choose the *Miscellaneous* tab.
2. Make sure the *Canadian Style Date/Amount* is checked in the *Special Items* section.

PrintBoss can handle a mixture of US and Canadian banks if checks are written in both countries.