

Liaison Software Corporation

Liaison Messenger

User
Guide



Liaison
Software Corporation

Liaison Messenger®

END USER GUIDE

This document is also available on the CD in a PDF format and can also be printed on 8-1/2 x 11 paper for easier reading.

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2021 E. 4th Street • Suite 218
Santa Ana, CA 92705
Phone 714.543.9877 • Fax 714.543.9879

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TABLE OF CONTENTS

TECHNICAL SUPPORT.....	4
PRINTING FORMS WITH CLIENT	5
SAVING SELECTION CRITERIA	5
SAGE PFW	6
<i>Printing PFW/BatchMaster Documents</i>	<i>6</i>
<i>PFW Posting Procedures.....</i>	<i>6</i>
<i>Reprinting (UnPosted) Invoices.....</i>	<i>8</i>
<i>Reprinting (Posted) Historical documents.....</i>	<i>8</i>
DYNAMICS GP.....	10
<i>Printing Dynamics GP Documents.....</i>	<i>10</i>
<i>Reprinting (Posted) Historical GP Documents.....</i>	<i>11</i>
<i>Producing Dynamics GP EFT-AP (Accounts Payable) Notices.....</i>	<i>12</i>
<i>Producing Dynamics GP EFT-DD (Direct Deposit).....</i>	<i>14</i>
DYNAMICS SL.....	18
<i>Printing Dynamics SL Documents</i>	<i>18</i>
MAS 90/200	19
<i>Printing MAS 90/200 Documents</i>	<i>19</i>
<i>Reprinting MAS 90/200 Forms</i>	<i>20</i>
DESKTOP FAXING, E-MAILING, AND LOCAL PRINTING	21
RETRIEVING ARCHIVED FORMS	22
FROM MESSENGER CLIENT	22
FROM ARCHIVE MANAGER.....	22
INTEGRATING LIAISON MESSENGER TO MAIN SCREENS	23
SAGE PFW AND BATCHMASTER.....	23
<i>Customization Workbench</i>	<i>23</i>
<i>Recommend CWB Parameter Settings:.....</i>	<i>23</i>
<i>CWB Parameter settings Screenshots.....</i>	<i>25</i>
DYNAMICS GP.....	26
<i>BatchFiles, Shortcuts and Pallettes</i>	<i>26</i>

Using Modifier or VBA 28

DYNAMICS SL 29

Dynamics SL Order Management..... 29

TECHNICAL SUPPORT

Support phone number: (714) 543-9877 x208

Support e-mail: support@liaisonsc.com

Website: www.liaisonsc.com





print a select group of orders or invoice.

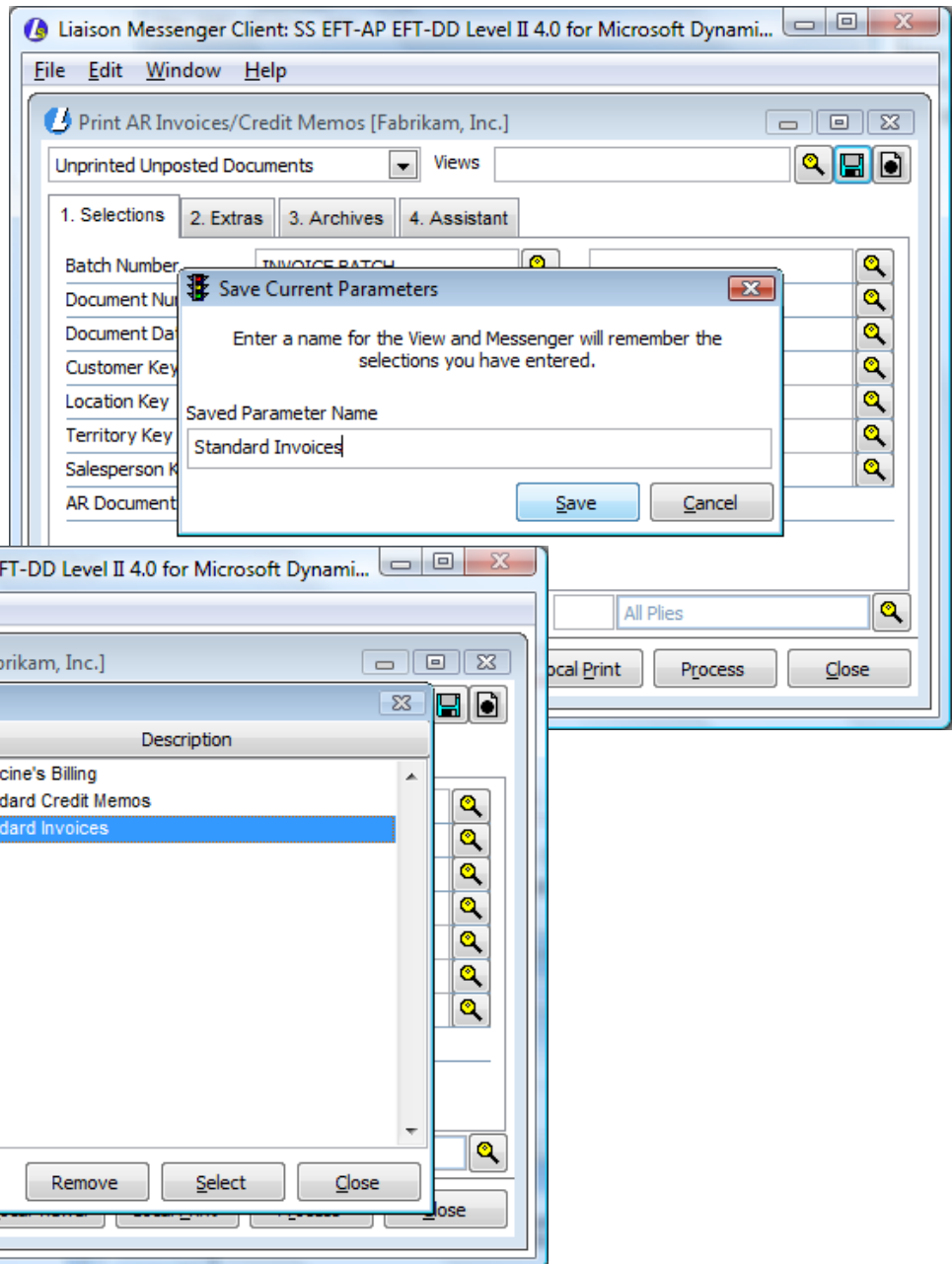
As you may have noticed, Messenger provides many new and different ways to select and print orders and invoices.

Use the Lookup, Save, and Clear buttons next to the Views field on the form to Access, Save, and Create these View Listings of Saved Parameters.

PRINTING FORMS WITH CLIENT

SAVING SELECTION CRITERIA

You can save common criteria in Views or Saved Parameters Listings. This way you do not have to reenter the criteria each time you want to



SAGE PFW

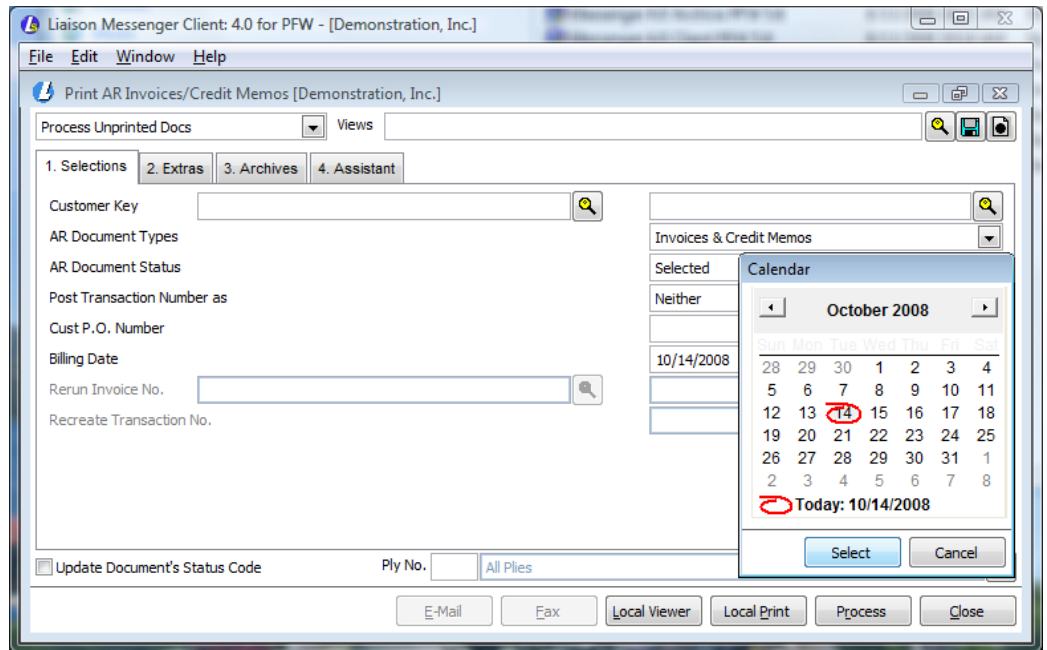
PRINTING PFW/BATCHMASTER DOCUMENTS

During the early stages of implementing Liaison Messenger, you may wish to run parallel with the PFW print routines for forms. If this is the case, uncheck the Update Document's Status Code from the System Setup screen in Messenger Server. This will cause the respective Checkbox to be unchecked in Messenger Client by default as shown in the screen shot below.

If you do wish to run parallel, print the forms in PFW first, do NOT post, and then print the same forms in Messenger as a Rerun. Once printed from Messenger, you should post as you normally have done in the past.

Now, the following procedures assume that Liaison Messenger will be printing and driving the forms printing and parallel processing will no longer be done.

So, when you decide to run Messenger live, make sure you have checked Update Document's Status Code in System Configuration or from the respective forms Printing window.



This is the only way Messenger can update the print status codes, assign invoices numbers and post work orders and purchase orders.

NEW FOR PFW 5.6 - IS THE HOLD FLAG. LIAISON MESSENGER DOES RECOGNIZE THIS FIELD AND WILL NOT PROCESS THIS OR CHANGE THE DOCUMENT'S STATUS. YOU MAY; HOWEVER, PRINT AND PREVIEW THE DOCUMENT USING THE LOCAL VIEWER AND LOCAL PRINT BUTTONS. THIS IS NICE FOR DESK-TOP CHECKING.

PFW POSTING PROCEDURES

PLEASE NOTE THAT THE ONLY FORMS THAT LIAISON MESSENGER CAN *POST* ARE SALES ORDERS AND PURCHASE ORDERS. AR INVOICES AND SO INVOICES MUST BE POSTED IN PFW **AFTER** MESSENGER PRINTS THE FORM.

Since Messenger updates the Status codes to show they've been printed, the Invoices do not actually print again, but they will be posted following PFW standard methods. Also, during Invoice processing, Liaison Messenger **does assign** the Invoice Numbers using the same procedures as PFW and BatchMaster.

AR INVOICES AND CREDIT MEMOS

From the Messenger Client, select Print AR Invoices/Credit Memos from the File menu. Select the applicable fields and choose Process when ready. When everything has printed and looks OK. Run the Invoice Print & Post routine in PFW. The forms will not print but they will be posted.

Credit Memos will be printed within an Invoice run;

however, the form will say Credit Memo instead of Invoice with <Credit Memo> printed across the top.

This eliminates the multiple step process you need to print Credit memos should you require pre-printed Credit Memo forms.

If the Update Platinum Status Code is NOT checked, Invoices Numbers will NOT be assigned to invoices or credit memos and therefore not print.

SALES ORDER INVOICES, PACKING SLIPS, BILLS-OF-LADING, INTERNATIONAL INVOICES

From the Messenger Client, select Print SO Invoices from the File menu. When everything has printed and looks OK. Run the Invoice Print & Post routine in PFW.

The forms will not print but they will be posted. If the Update Platinum Status Code is NOT checked, Invoices Numbers will NOT be assigned to invoices and therefore not print on the Invoice.

SALES ORDERS, BACK ORDERS, PICKING TICKETS, QUOTATIONS, AND ACKNOWLEDGEMENTS

From Messenger Client select Print Sales Orders from the File menu. Choose the appropriate values and select Process.

PURCHASE ORDERS AND ADJUSTED ORDERS

From Messenger Client, choose Print Purchase Orders from the File menu. When everything has printed and looks OK. This Procedure will Post the Purchase Orders when you print them. If; however, a down payment had been entered on this P.O., you will have to run the Post Purchase Orders option in order to post the financial transaction.

SHIPPING DOCUMENTS, PACKING SLIPS, BILLS-OF-LADING, INTERNATIONAL INVOICES

From Messenger Client, choose Print Shipping Documents from the File menu.

By default, Messenger preloads one Bill of Lading and Packing Slip. Of course you can change any or all of this if you want.

This process does not have a posting function. It will work on Sales Order and Sales Order Invoices regardless of their status or selection flag.

To further enhance this feature, you can add International Invoices, or create UPS waybill templates and add them to the Properties. With some clever filtering you can automate your entire shipping process.

A nice tip is to try printing Bill of Ladings on 3-part continuous NCR paper using a Dot-Matrix printer. Messenger will create the entire form, text, borders, etc... The NCR paper will allow signatures to “crush” through to the 2nd and 3rd copies. If you are using BatchMaster, make sure you select the correct Bill of Lading when setting up the Shipping Documents in Properties. There is one for pre-printed and one for blank paper (BatchMaster Bill of Ladings) as well-as generic layouts under the available templates listing.

There is also an option for you to specify a specific Ply Number (referencing the Ply number in Messenger Properties) of the Form Type as well as the number of copies. This is handy if you wish to create a Shipping Labels ply, special document or anything your imagination and Liaison Messenger permits.

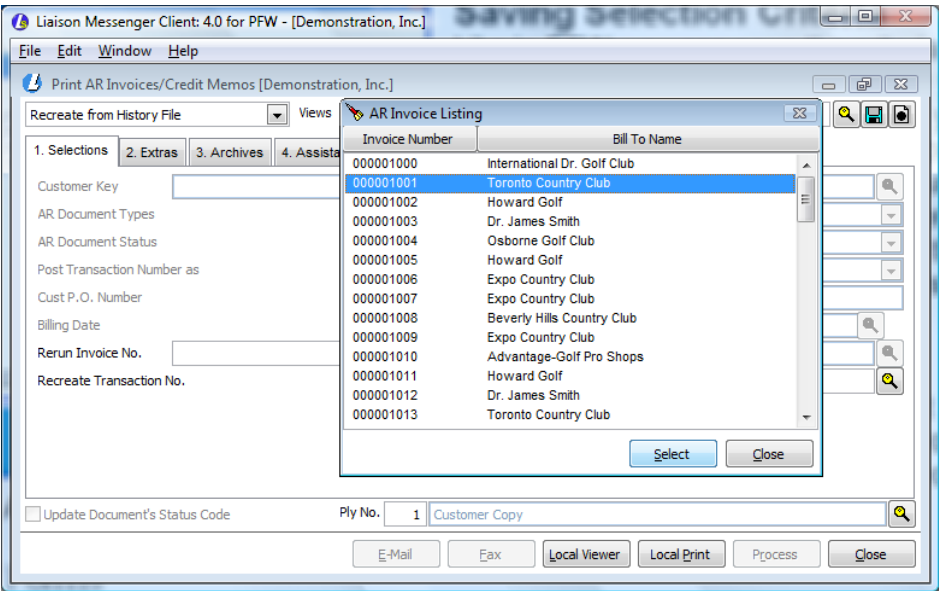
REPRINTING (UNPOSTED) INVOICES

If a problem has arisen with the latest print job and ***they have not been posted*** in PFW, you can rerun the jobs. You will be prompted for the Invoice or Order Number range. After which you may select Process, which will rerun the last print job.

REPRINTING (POSTED) HISTORICAL DOCUMENTS

If the order or invoice has already been posted, Messenger Client's Recreate may assist you in regenerating a form.

The PC/user making the Recreate request will print or preview the reprinted form. Messenger Server will service all New and Rerun print jobs.



DYNAMICS GP

PRINTING DYNAMICS GP DOCUMENTS

Make sure you have checked Update Times Printed Value in System Configuration or from the respective Messenger Client window.

This is the only way Messenger can update any Status Codes and/or increment the Times Printed fields.

AR INVOICES AND CREDIT MEMOS

From the Messenger Client, select Print AR Invoices/Credit Memos from the File menu. Select Unprinted Unposted Documents from the drop-list box and then the applicable fields and choose Process when ready.

Returns or Credit Memos will be printed within an Invoice run; however, the form will say Credit Memo instead of Invoice with <Credit Memo> printed across the top. This eliminates the multiple step process you need to print Credit memos should you require pre-printed Credit Memo forms.

SOP INVOICES

From the Messenger Client, select Print SO Invoices/Shippers from the File menu. Select the Process Unprinted Docs from the drop-list box, enter any other criteria in the applicable fields and choose Process when ready.

SOP SALES ORDERS

From Messenger Client select Print Sales Orders from the File menu and follow the instructions for the SOP Invoices.

POP PURCHASE ORDERS

From Messenger Client, choose Print Purchase Orders from the File menu follow the instructions for the SOP Invoices.

REPRINTING (POSTED) HISTORICAL GP DOCUMENTS

If a problem has arisen with the latest print job and the documents have not yet been posted, you can rerun the print job(s) by simply select the desired process from the drop-list field in the upper left-hand section of the Print form and reselecting the criteria from the 1. Selections and 2. Extras tab(s).

If the documents have been posted, they are considered Historical Documents and are recreated as such. Messenger Client's Recreate capabilities may assist you in regenerating a form. The 2 options are

1. Recreate Printed and Posted Documents
2. Recreate Unprinted and Posted Documents.

The selection of either of these 2 options may dim out certain criteria selection fields; but, it may also enable the direct E-mail and Fax buttons for desktop control of re-sending copies of these forms. More detailed information regarding this feature can be found later in this guide under: Desktop Faxing, E-mailing, and Local Printing.

Also, there is an Archive tab on the form which can be used to retrieve, view, print previously Archived documents. More detailed information regarding this feature can be found later in this guide under: Retrieving Archived forms.

There is also an Archive Manager (found on the File menu) where there is a tab for each form type. The Archive Manager reads the directory location from the Properties that were entered for that form. This Archive Manager can be found Messenger Client and Messenger Server components.

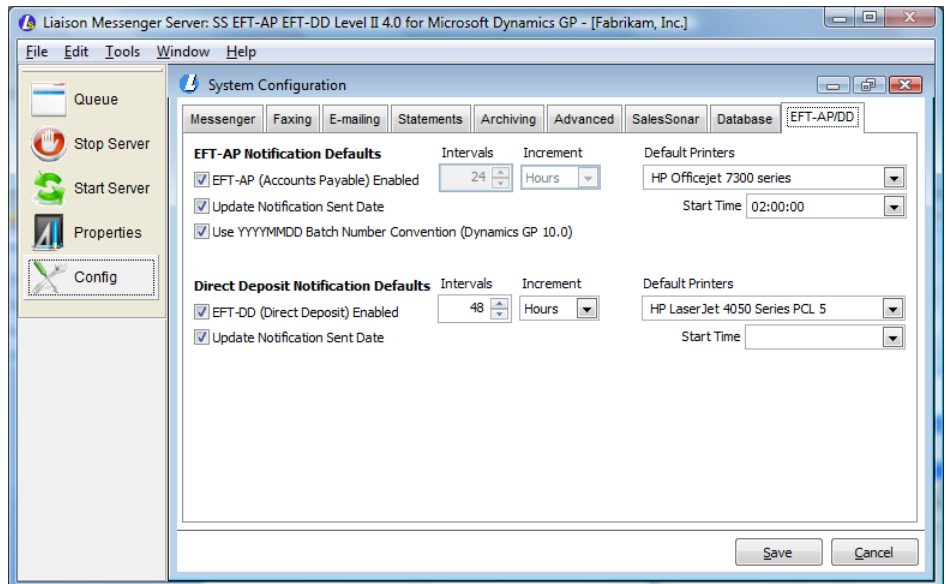
When launched, the Archive Manager displays all the files for the respective form in a scrolling list box. When a batch is selected (by double clicking), the respective file is displayed using the designated reader. In most cases this is the free Adobe Acrobat reader.

PRODUCING DYNAMICS GP EFT-AP (ACCOUNTS PAYABLE) NOTICES

To enable the EFT-AP module for Messenger, place a check in the respective EFT-AP Enabled box on the EFT-AP/DD tab in System Configuration.

Messenger EFT-AP or EFT-DD will print, fax, or e-mail an EFT-AP Notice to the respective vendor or email and EFT-DD paystub to the employee whenever the Electronic Payment process is performed in Microsoft Dynamics GP.

After you've enabled the module, you should specify a default printer, the desired polling interval and increment and the check the Update Notification Send Date fields.

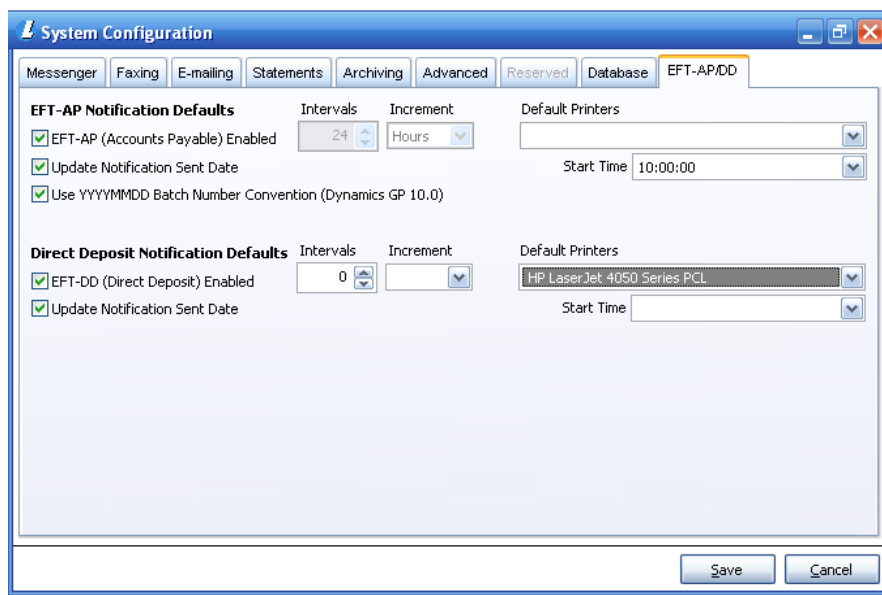


INCLUDE/EXCLUDE VENDORS

The Vendor's preference must be specified in Recipients Preferences in order for them to receive the EFT notice via email or fax. This can be done by selecting this option from the menu in Messenger Client, Messenger Server, or under the Messenger Properties Vendor tab.

ESTABLISH THE EFT ROUTING RULES

Once you've done the above steps, refer to the Chapter called Print, Fax, Email, & Routing to create your business rules for each EFT form template and ply.



In System Configuration | EFT-AP/DD tab the EFT module is enabled and configured.

Check the 'Update Notification Sent Date' to advance the 'Last Date' field after the EFT processes. This is used to determine if an EFT notice has been printed.

The Default Printer is used as a backup in case one of the printers selected in Properties is unavailable.

Ply	Marginal Words	Routing	Template	Custom	Cons
1	Vendor	WLIAISON_HOST\HP LaserJet 4050 S	LMP2EB00	LMPCEB02	
2			LMP2EB00		
3			LMP2EB01		

The Interval and Increment is set to establish how often Messenger will poll for unprinted notices. You can also specify a Start Time and/or a Delay based on the date.

In the example, Messenger will poll every 24 hours at 2:00AM for any EFTs that generated after the 'Last Date' and 'Last Time'.

displayed in Messenger. The 'Last Date' and 'Last Time' will be updated in Messenger after the notices have been processed.

The Ply Configuration and Vendor preferences use the same rules as the other form types. Refer to the chapter that covers Properties for further instructions.

Messenger Client can be used to manually process the EFT notices manually by Batch number.

To run as a replacement to the automatic processing check the 'Update Date/time of Last Transmission' box. This will update the Last Date and Last Time fields in System Configuration.

Checking 'Ignore Last Process Date' will allow any previously printed notices to be reprinted.

The ply number can also be specified. Leaving the field blank will process all plies defined on the EFT-AP tab of Properties.

PRODUCING DYNAMICS GP EFT-DD (DIRECT DEPOSIT)

Messenger EFT-DD is enabled under the EFT-AP/DD tab of System Configuration.

A default printer should be selected. A network printer is best. Do not choose 'Liaison Messenger PDF' or any other virtual print driver.

The Interval and Increment fields along with Start Time are used for scheduling Messenger to automatically poll for new DD ACH files. The Client can also be used to select the ACH batch when ready.

Employee information is read from the Employee card in Dynamics GP. The emails address pulls from the internet information window (italics *i* to right of address ID) The Password field is also read from this window. Emailed PDFs of DD advice will require this password in order to open the attachment. If no password exists the PDF will open without a prompt.

The screenshot shows the 'System Configuration' window with the 'EFT-AP/DD' tab selected. It contains two main sections: 'EFT-AP Notification Defaults' and 'Direct Deposit Notification Defaults'. Each section has checkboxes for enabling the feature, a numeric field for 'Intervals', a dropdown for 'Increment' (set to 'Hours'), and a 'Default Printers' dropdown. The 'Start Time' is set to '10:00:00'.

Section	Feature Enabled	Intervals	Increment	Default Printers	Start Time
EFT-AP Notification Defaults	<input checked="" type="checkbox"/> EFT-AP (Accounts Payable) Enabled <input checked="" type="checkbox"/> Update Notification Sent Date <input checked="" type="checkbox"/> Use YYYYMMDD Batch Number Convention (Dynamics GP 10.0)	24	Hours		10:00:00
Direct Deposit Notification Defaults	<input checked="" type="checkbox"/> EFT-DD (Direct Deposit) Enabled <input checked="" type="checkbox"/> Update Notification Sent Date	0		HP LaserJet 4050 Series PCL	

The screenshot shows the 'Employee Address Maintenance' window for employee BARB0001, Angela Barbariol. It displays various contact details including address, city, state, ZIP code, and phone numbers.

Field	Value
Employee ID	BARB0001
Name	Barbariol, Angela
Address ID	PRIMARY
Address	456 Cedar Ave
City	Fort Wayne
State	IN
ZIP Code	46001
Country	USA
Phone 1	(219) 555-0176 Ext. 0000
Phone 2	(219) 555-0178 Ext. 0000
Phone 3	(000) 000-0000 Ext. 0000
Fax	(219) 555-0145 Ext. 0000

The screenshot shows the 'Internet Information' window for employee BARB0001. It displays contact details such as email, home page, FTP site, image, login, password, and user-defined fields.

Field	Value
Employee ID	BARB0001
Address ID	PRIMARY
Internet Information	Angela Barbariol
E-mail	Angelab@liaisonsc.com
Home Page	
FTP Site	
Image	
Login	
Password	password
User Defined 1	
User Defined 2	
Additional Information	

Under File | Properties | Employees tab the employees are imported using the Add button. This can also be accessed from Client – File | Set Recipient Preferences.

NOTE: Each time a new employee is added to GP that is setup for direct deposit or a new email address is entered for an existing employee the Add button will need to be clicked to refresh the list. The buttons on the left filter the list for the purpose of determining which employees do not have 'Emailed' set as the preference but have an email address.

Each employee record has its own preference screen. The EFT-DD tab contains the Direct Deposit preference selection list. An employee can have a preference of Emailed or Suppress. Blank selections will be treated as printed. (see ply routing for more details)

Under the EFT-DD tab of Properties the plies are configured. Each ply consists of various components which are unique to that ply. In the example below there is an employee copy routing to the employee's preference and an archived copy creating a PDF file in the path specified.

Double click the ply to open the configuration window. Under the Routing tab the employee copy would have a routing of 'Send Copy to Employee'. This will send via email if the employee preference is set to 'Emailed'. If the preference is set to 'Suppress' that employee's notice will not be sent. A blank employee preference will be treated as Printed and route to the Default printer specified on the EFT-AP/DD tab of System Configuration.

If no printed copy is desired for employees without emails a filter can be

The screenshot shows the 'Employee Preferences' window for Angela Barbario. The 'EFT-DD' tab is selected. A dropdown menu for 'Direct Deposit' is open, showing options: Default, Printed, Faxed, E-mailed (highlighted), and Suppress. A message states 'The Default Printer is not available for EFT-DD Documents'. Buttons for 'Save' and 'Cancel' are at the bottom right.

The screenshot shows the 'Properties' window for Fabrikam, Inc., with the 'EFT-DD' tab selected. A table lists plies with columns: Ply, Marginal Words, Routing, Template, Custom, and Constant. Ply 1 is 'Employee' with routing 'Send Copy To Employee' and template 'LMP2DD00'. Ply 2 is 'File' with routing 'Archive Copy To Disk' and template 'LMP2DD00'. A 'Direct Deposit Ply Configuration' window is open over the table, showing the 'Routing' tab with 'Send Copy To Employee' selected. It includes fields for 'Device/Path' (EMPLOYEE), 'Cascade' (This Device Only), and 'Data Format'. A 'TARGET' field is at the bottom. 'Save' and 'Cancel' buttons are at the bottom right.

Ply	Marginal Words	Routing	Template	Custom	Constant
1	Employee	Send Copy To Employee	LMP2DD00		
2	File	Archive Copy To Disk	LMP2DD00		C:\MSG40GP\LMCSETUP\MAS

placed under the Filters tab to ignore these printed copies and only send the emailed copies. Syntax: LMDDFT.DDPREF=4

The Subject line and body text for the employee email are entered under the Email Text tab.

The DD advice number is automatically appended to the end of the subject line. To suppress this number check the box on the bottom right.

An archive copy is created by selection 'Archive Copy to Disk' for the routing method. The path where the archived PDF file is to be stored is selected by clicking the yellow lookup icon to the right of the Target field. A UNC path can also be used by typing the path directly in the Target line.

To add a new blank ply click the Add button. To copy an existing ply single click the ply to copy then click the Clone button. A new ply will be created with the same configuration as the one cloned.

To remove a ply single click the ply then click the Delete button. The Preview and Test Print buttons are used to check the layout. In the TWO test

company all data will appear. In all other companies data specific to the employee is suppressed for security purposes.

Direct Deposit Ply Configuration

1. Appearance 2. Routing 3. Data 4. Filters 5. Attachments 6. E-mail Text 7. Sorting

Subject: Direct Deposit Advice

Unique E-mail Body for this Ply

Attached is your direct deposit notice for the current pay period.
If you have any questions please contact Sue in HR.

☐ Suppress Payment Number from Subject

Sent on Behalf of:

Ply No. 1 Form ID DIRDEP Save Cancel

Direct Deposit Ply Configuration

1. Appearance 2. Routing 3. Data 4. Filters 5. Attachments 6. E-mail Text 7. Sorting

Routing Method: Archive Copy To Disk ☐ Template for this Printer Only

Device/Path: ARCHIVE ☐ Suppress All Text Messaging

Cascade: This Device Only

Data Format:

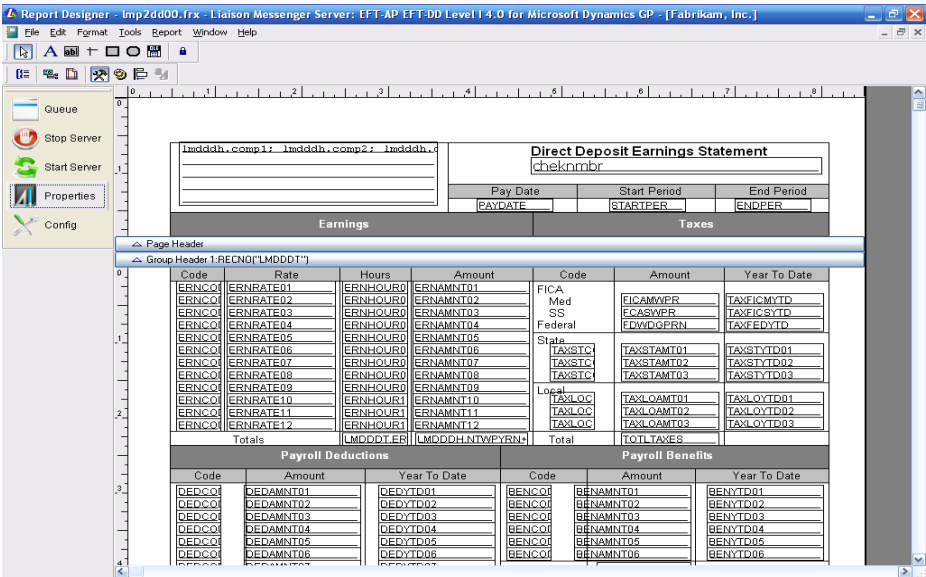
TARGET: Constant Fax Number/E-Mail Address/Archive Folder

C:\MSG40GP\LMCSETUP\MASTER\

Ply No. 2 Form ID DIRDEP Save Cancel

AR Docs SOP Docs SOP Inv POP Docs Statements Ship Docs RM Trxs EFT-AP EFT-DD					
Test Print Preview Modify Layout Add Clone Config Up Dn Delete					
Ply	Marginal Words	Routing	Template	Custom	Constant
1	Employee	Send Copy To Employee	LMP2DD00		
2	File	Archive Copy To Disk	LMP2DD00		C:\MSG40GP\LMCSETUP\MASTER\

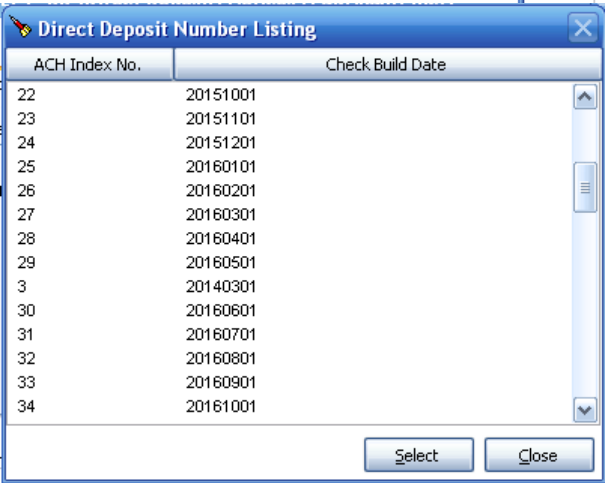
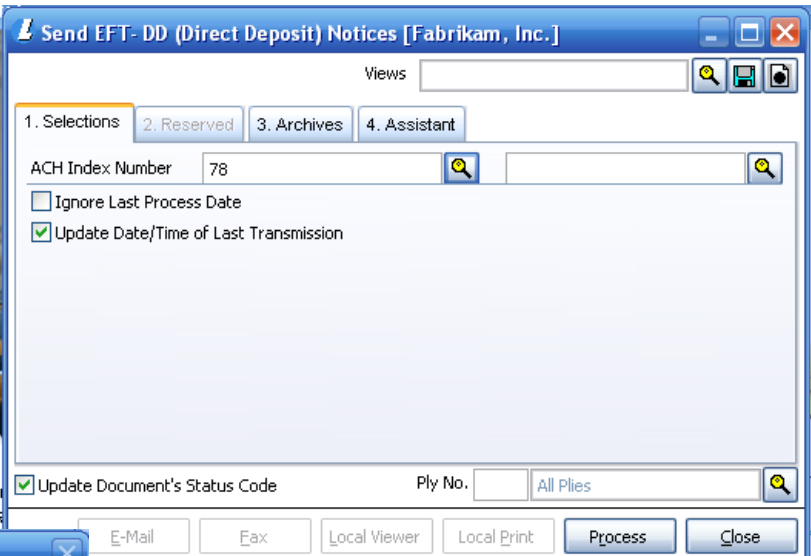
The DD advice template can be modified by clicking the Modify Layout button. Refer to the section on the report designer in the main configuration guide.



The Messenger Client is used to submit the job to the queue on Messenger Server to process the DD advice notices.

The yellow lookup icons are used to select from the number listing. The ACH index number is used to select the batch but the check build date is displayed to make the search easier. Clicking the column headings will sort by the column clicked.

Check the 'Ignore Last Process Date' box to reprint older batches that have already been sent. The Ply No. selection can be used



to only process the ply selected. For example: to only resend the archive copy without resending the employee copy.

Once all parameters have been selected click the 'Process' button to submit the job to the Messenger Server queue. A confirmation window will appear indicating the job has been sent to the queue. The Messenger Server must be open and on the Green status light in order for the job to process.

DYNAMICS SL

PRINTING DYNAMICS SL DOCUMENTS

If the Unattended Processing feature is not used, forms can be processed from Messenger Client. By default, Messenger Client is found on the Start Program menu in Windows under the Liaison Software folder.

Optionally, you can add the respective Messenger Client Screens to the menu system under the respective module in Solomon IV.

Please see the Chapter titled Call Messenger from MBS Solomon IV in the user guide or refer to your Solomon IV documentation for instructions on adding third party programs.

AR INVOICES AND CREDIT MEMOS

From the Messenger Client, select Print AR Invoices/Credit Memos from the File menu. Select the applicable fields and choose Process when ready.

SHIPPER DOCUMENTS AND INVOICES

From the Messenger Client, select Print SO Invoices/Shippers from the

File menu. Select the applicable fields and choose Process when ready.

ORDER CONFIRMATION/QUOTATIONS

From Messenger Client select Print Sales Orders from the File menu. Choose the appropriate values and select Process.

PURCHASE ORDERS

From Messenger Client, choose Print Purchase Orders from the File menu.

When everything has printed and looks OK, choose the appropriate values and select Process. This Procedure will also Post the Purchase Orders when you print them if you have the Update to the Next Function ID checked.

BILL OF LADINGS, PACKING SLIPS, SHIPPING DOCUMENTS

From Messenger Client, choose Print Shipping Documents from the File menu. Chose the appropriate values and select Process.

MAS 90/200

PRINTING MAS 90/200 DOCUMENTS

When you decide to run Messenger live, make sure you have checked Update <FormType> Status Code in System Configuration or from the respective Messenger Client window. This is the only way Messenger can update any Status Codes and/or increment the Times Printed fields.

AR INVOICES AND CREDIT MEMOS

From the Messenger Client, select Print AR Invoices/Credit Memos from the File menu. Select the applicable fields and choose Process when ready.

Returns or Credit Memos will be printed within an Invoice run; however, the form will say Credit Memo instead of Invoice with <Credit Memo> printed across the top. This eliminates the multiple step process you need to print Credit memos should you require pre-printed Credit Memo forms.

SALES ORDER INVOICES

From the Messenger Client, select Print SO Invoices/Shippers from the File menu. Select the applicable fields and choose Process when ready.

SALES ORDERS

From Messenger Client select Print Sales Orders from the File menu. Chose the appropriate values and select Process.

PURCHASE ORDERS

From Messenger Client, choose Print Purchase Orders from the File menu. . Chose the appropriate values and select Process.

REPRINTING MAS 90/200 FORMS

Liaison Messenger Client: Level I 4.0 for MAS 90/200 - [ABC Distribution and Service ...]

File Edit Window Help

Purchase Order Printing

Ranges From To (optional)

P.O. Number Vendor ID P.O. Date Order Status All Status

Include PO Type

☒ Standard ☐ Master Order ☒ Drop Ship ☒ Material Requisition ☒ Repeating

Messages

Line 1 Line 2

Print Options

☐ Update Purchase Orders as Printed ☒ Include Previously Printed Orders Preview Ply

Parameters

Preview Process Close

If a problem has arisen with the latest print job you can rerun the print job(s). Simply reselect the criteria and check the Include Previously Printed Orders checkbox and then choose Process.

DESKTOP FAXING, E-MAILING, AND LOCAL PRINTING

DESKTOP PRINTING, FAXING, AND E-MAILING OF RECREATES

Liaison Messenger Client: SS EFT-AP EFT-DD Level II 4.0 for Microsoft Dynamics GP - [Fab...]

File Edit Window Help

Print SOP Sales Orders

Rerun Printed Docs Views

1. Selections 2. Extras 3. Archives 4. Assistant

Batch Number

SOP Number INVS3019

Document Date / /

Customer Key

Location Key

Territory Key

Salesperson Key

☐ Quote ☒ Order ☒ Invoice ☐ Return ☐ Back Order ☐ Fullfillment

☐ Update Times Printed Value Ply No. All Plies

E-Mail Fax Local Viewer Local Print Process Close

From the Client screen, you have the option to E-Mail, Fax, Local Viewer (preview) Local Print, or Process.

Of course your Messenger Server must be setup to fax and e-mail since it is that machine that processes the forms.

On Prints and Previews, the local machine produces the form.

Also, keep in mind that when a recreate is issued, the Form Template assigned to Ply number 1 of that form type is used unless you specify otherwise on this form.

When faxing or e-mailing, the remittance Fax/E-mail Address is used. You can; however, overwrite this before submitting.

Faxing has the option of including a Cover Sheet with which you can add text or a message.

This cover sheet must be identified and setup first on Messenger under the Faxing tab Server in System Configuration.

Liaison Messenger Client: SS EFT-AP EFT-DD Level II 4.0 for Microsoft Dynamics GP - [Fab...]

File Edit Window Help

Print SOP Sales Orders

Rerun Printed Docs Views

1. Selections 2. Extras 3. Archives 4. Assistant

Recipient Confirmation [AMERICAN0001-American Science Museum]

Fax Number (314) 555-0106 ☐ Dial Fax Number as International

E-mail Address jeffevenson@liaisonsc.com

Attention Jeff

Subject Invoice Duplicate

Memo Here is a copy of that invoice. |

Proceed Cancel

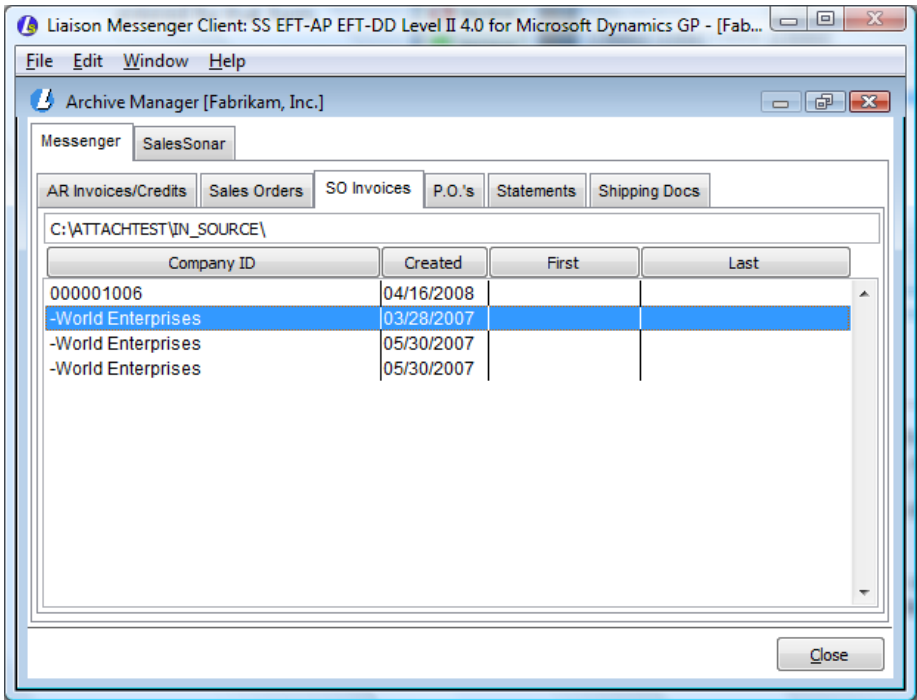
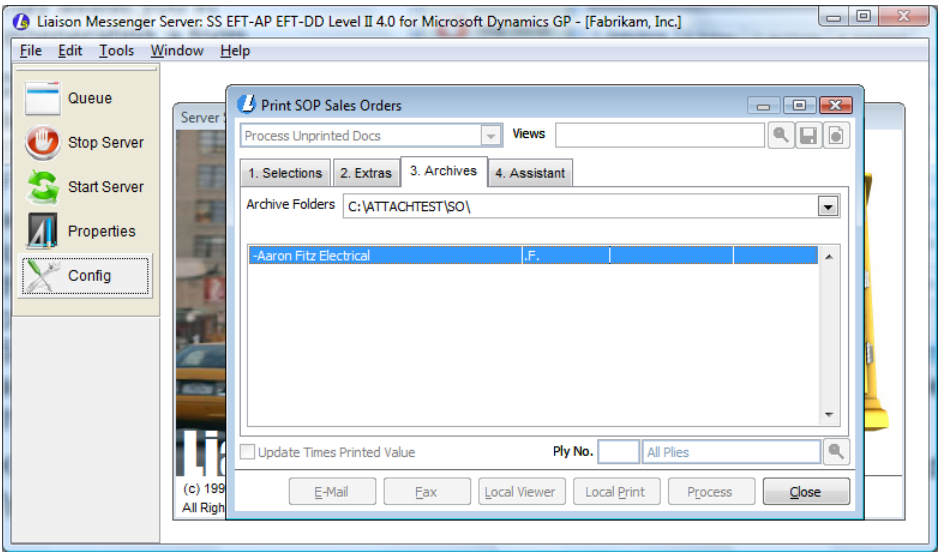
RETRIEVING ARCHIVED FORMS

FROM MESSENGER CLIENT

To access any previously archived form(s), choose the new Archive Manager from the File menu of Messenger Client. This utility will show all archived forms as specified in Properties for each form.

There is a tab for each form. The Archive Manager reads the directory location from the Properties that were entered for that form.

When launched, the Archive Manager displays all the files for the respective form in a scrolling list box. When a batch is selected (by double clicking), the respective file is displayed using the designated reader. In most cases this is the free Adobe Acrobat reader.



selected (by double clicking), the respective file is displayed using the designated reader. In most cases this is the free Adobe Acrobat reader.

FROM ARCHIVE MANAGER

To access any previously archived form(s), choose the Archive Manager from the File menu of Messenger Client. This utility will show all archived forms as specified in Properties for each form.

There is a tab for each form. The Archive Manager reads the directory location from the Properties that were entered for that form.

When launched, the Archive Manager displays all the files for the respective form in a scrolling list box. When a batch is

INTEGRATING LIAISON MESSENGER TO MAIN SCREENS

SAGE PFW AND BATCHMASTER

CUSTOMIZATION WORKBENCH

Adding the Messenger Client to the PFW menu system can easily be accomplished through the PFW Customization Workbench (CWB) available from Sage Software, Inc. This instruction guide is not intended to replace the documentation for the CWB that was provided by Sage. Liaison Software Corporation does not supply the CWB. This is a purchased module and follows all of Sage Software, Inc licensing guidelines. To add menu items, simply follow the steps outlined below:

You must be logged in as a user with the Developer profile.

For each of the Modules you wish to add a Messenger menu option, here are the required parameters you need to call the applicable form along with the suggested Menu Caption.

On the Menu Item Properties, choose the Display tab and set the Caption, and Service Type fields as described below under the Recommend Settings section..

The Queue tab does not contain any options related to Messenger. Accept the defaults.

Then select the Navigation and Access tab and enter the Method and Program for the each of respective form types you wish to access through PFW.

Once completed, you will have to add Access Rights for each of these options under the applicable User Groups. This can be accomplished under Admin user ID.

RECOMMEND CWB PARAMETER SETTINGS:

Caption: Print Messenger Invoices/Credit Memos
 Application: Accounts Receivable
 Service Type: Document Print and Post
 Method: Run External Program
 Program: x:\PLATINUM\LIAMCLI.EXE "ARINVOICE"

Caption: Print Messenger Invoices
 Application: Sales Order
 Service Type: Document Print and Post
 Method: Run External Program
 Program x:\PLATINUM\LIAMCLI.EXE "SOINVOICE"

Caption: Print and Post Messenger Sales Orders
 Application: Sales Order
 Service Type: Document Print and Post
 Method: Run External Program
 Program x:\PLATINUM\LIAMCLI.EXE "SALESORDER"

Caption: Print and Post Messenger Purchase Orders

Application: Purchase Order

Service Type: Document Print and Post

Method: Run External Program

Program x:\PLATINUM\LIAMCLI.EXE "PURCHASEORDER"

Caption: Print Messenger Statements

Application: Accounts Receivable

Service Type: Report

Method: Run External Program

Program x:\PLATINUM\LIAMCLI.EXE "STATEMENT"

CWB PARAMETER SETTINGS SCREENSHOTS

SCREEN SHOTS: #1 – DISPLAY TAB

Menu Item Properties - English (United States)

Caption: Print and Post Messenger Sales Orders

Application: Sales Order

Service Type: Document Print and Post

Display | Queue | Navigation and Access

Menu Display

Installed Options Filter:

☒ Show on menu if installed options filter condition is true

User Interface Display

Definition File: Help ID:

AFP File: Engine:

Options:

Report Parameter Options

☐ Show Parameters tab

☐ Show Routing tab

☐ Show Distribution tab

☐ Show Printer option on Routing tab

#2 – QUEUE TAB

Menu Item Properties - English (United States)

Caption: Print and Post Messenger Sales Orders

Application: Sales Order

Service Type: Document Print and Post

Display | **Queue** | Navigation and Access

Default Settings

Preferred Queue: Main Processing Queue

Priority: 1

Job Properties

Supplemental Commands:

The Supplemental Commands will be added to the end of the command string which is sent to the Application Server. In addition, the following properties may be defined:

☒ Job may be cancelled while in process

☐ Monitor job for messages from Application Server

#3 – NAVIGATION AND ACCESS TAB A

Menu Item Properties - English (United States)

Caption: Print and Post Messenger Sales Orders

Application: Sales Order

Service Type: Document Print and Post

Display | Queue | **Navigation and Access**

Navigation

Method: Run external program

SP Value:

Program: J:\PLATINUM\LIAMCLI.EXE "SALESORD"

Access

Process Lock ID:

#4 - NAVIGATION AND ACCESS TAB B

Menu Item Properties - English (United States)

Caption: Print and Post Messenger Sales Orders

Application: Sales Order

Service Type: Document Print and Post

Display | Queue | **Navigation and Access**

Navigation

Method: Run external program

SP Value:

Program: LATINUM\LIAMCLI.EXE "SALESORDER"

Access

Process Lock ID:

DYNAMICS GP

BATCHFILES, SHORTCUTS AND PALLETTES

By simply calling the Liamcli.exe executable and passing additional arguments (or parameters) you can integrate Messenger into other programs or call certain feature directly from a shortcut in Windows.

Please not that you can NOT call a file with Parameters in the GP Dynamics Shortcut capabilities.

In order to accomplish this, create a good ole fashioned batch file in Windows Notepad like this:

PRINTPO_TWO.BAT

Save it in the X:\messenger folder.

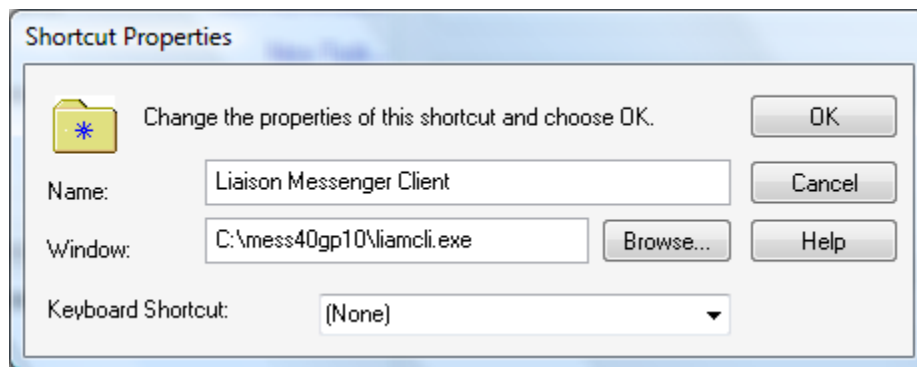
SYNTAX: <X:\messenger\Liamcli.Exe <CommandID> <CompanyID>

Using the above syntax, create a line like this and save:

<X:>\messenger\Liamcli.Exe PURCHASEORDER TWO

The above example would launch the Print Purchase Order window from Messenger Client directly from within Dynamics GP.

The first argument is the Command ID the second argument is the Company ID. Both are uppercase only because they are case sensitive.

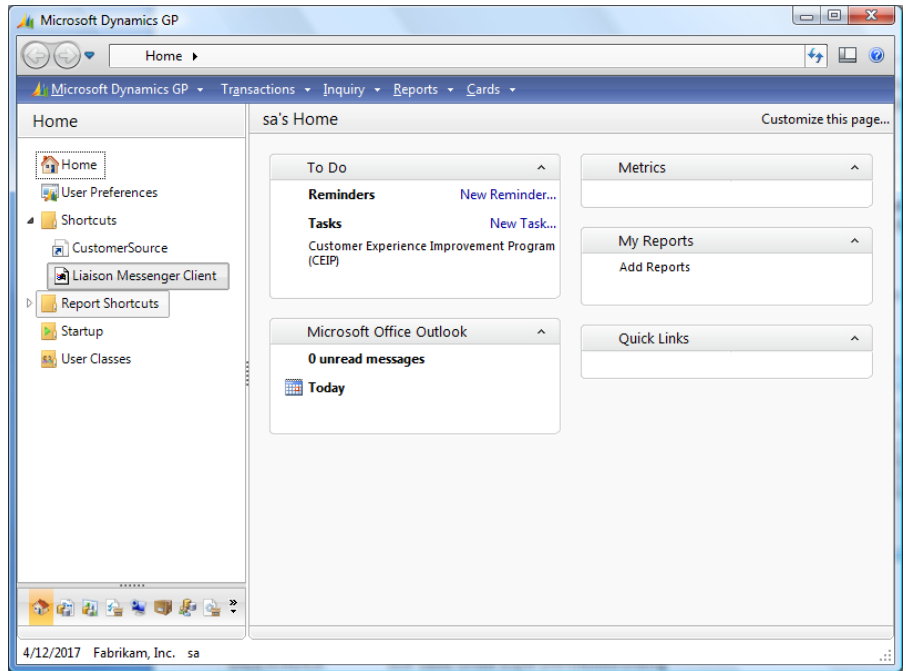


The Company ID identifies the Company dataset (i.e. The World Online) is actually TWO.

For example, to call the Print Purchase Order Documents dialog box from the World Online, Inc would look like this:

X:\messenger\Liamcli.Exe
PURCHASEORDER TWO

Below are the available commands for Liamcli.Exe.



<u>Command ID:</u>	<u>Action</u>
ARINVOICE	IVC Invoice Print Documents Dialog
SOINVOICE	SOP Invoice Print Documents Dialog
SALESORDER	SOP Sales Order Print Documents Dialog
PURCHASEORDER	POP Purchase Order Print Documents Dialog
SHIPDOCS	SOP Shipping Documents Print Documents Dialog
EBANK	EFT-AP Vendor Remittance Print Documents Dialog
DIRDEP	EFT-DD Direct Deposit Print Documents Dialog
PROPDFT	Territory, Salesperson, Location Routing Preferences
PROPCMS	Customer Form Routing Preferences
PROPVMS	Vendor Purchase Order Routing Preferences
PROPCVD	All Recipient Category Routing Preferences

USING MODIFIER OR VBA

Adding Messenger Client capabilities to other programs is easily accomplished with command line options. From Print Document windows to Recipient Preferences settings, you have complete control of Messenger Client without source code.

If you wish to add a Quick Print button to the Document entry screen that will place a Print Request for that order into the Messenger Queue, using Modifier or Dexterity, here is a sample VBA code

```
Dim sCmd
Dim sDoc
sDoc = DocumentNo
Save = 1
sCmd = "\\DSIMSSQL\Messnger\LIAMQUE.EXE SAND \\DSIMSSQL\Messnger SOP! 2 " & sDoc
MsgBox sCmd
Shell (sCmd)
```

For SOP Docs it would be:

X:\MESSENGER\LIAMQUE.EXE TWO X:\MESSENGER SOP! 2 <DOC NUMBER>

1	2	3	4	5	6
---	---	---	---	---	---

1. Path to Queue Requester
2. Company ID
3. Path where Messenger is installed
4. GP document type (exclamation point tells it to ignore if document has already been printed)
5. SOP TYPE (2=Order, 3=Invoice) Can be placed back to back i.e. 23 would print either Order or Invoice
6. SOP Number

You could also add # after the doctype to not update TIMESPRT as the example below illustrates:

C:\MsgrGPtest\liamque.exe TWO C:\MsgrGPtest SOP# 2 ORDST2286

For Purchase orders, the syntax would be:

X:\MESSENGER\LIAMQUE.EXE TWO X:\MESSENGER POP! 1234 <DOC NUMBER>

1	2	3	4	5	6
---	---	---	---	---	---

Path to Queue Requester

1. Company ID
2. Path where Messenger is installed
3. GP document type (exclamation point tells it to ignore if document has already been printed)
4. POP Status (i.e. Open, Released, Closed etc.) Can be placed back to back i.e. 1234 would print all but Cancelled POs
5. POP Doc Number

DYNAMICS SL

DYNAMICS SL ORDER MANAGEMENT

Liaison Messenger interfaces with Solomon IV's Order Management module by inserting equivalent Steps in the SOSteps table, which is defined for each Order Type.

If you plan on using Messenger to print, fax, e-mail, archive, or Exchange Data of Order Management Forms (Shippers/non-Shippers), you will need to update the Steps of each

Order Types (40.200.00)

Order Type: SO [Copy Order Type]

Description: Sales Order

Behavior | Numbers | Accounts | Steps | BMA

Steps (F4 for grid/form view)

Sequence	Description	Status	Invoke Automatically	Hold on Credit Failure	Print Notes
0100	Enter Order	Required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0110	Release Order	Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0200	Print Order Confirmation	Bypass	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0201	Use Messenger Order Confirmation	Required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0230	In Process (see Shipper)	Required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0300	Enter Shipper	Bypass	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0610	Print Packing Slip	Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0611	Use Messenger Packing Slip	Bypass	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0720	Confirm Shipment	Required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0800	Release for Update	Required	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0810	Update Shipper	Required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0820	Print Invoice	Optional	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0821	Use Messenger Invoice	Bypass	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Order Types (40.200.00)

Order Type: SO [Copy Order Type]

Description: Sales Order

Behavior | Numbers | Accounts | Steps | BMA

Steps (F4 for grid/form view)

Sequence: 0201

Description: Use Messenger Order Confirmation

Status: Required

☐ Invoke Automatically

☐ Hold on Credit Failure

☒ Print Notes

[Output Selection]

Order Type that you want processed. This is accomplished by select the Order Types screen from the Order Management module.

If you only will be processing Purchase Order and Statements or miscellaneous Invoices and Returns through Messenger, then this configuration is not required.

During the process of Enabling Company Databases when Messenger was being installed,

you had an option to Load or Remove Messenger Steps.

You should have checked Load Messenger Steps in Solomon IV, which was the default.

By doing this, Messenger inserted directly after every Solomon IV form printing operation the equivalent Messenger form processing operation. By default, all of the auto-inserted forms processing steps are in a Bypass status. This way Solomon IV will ignore them until you are ready to activate the step.

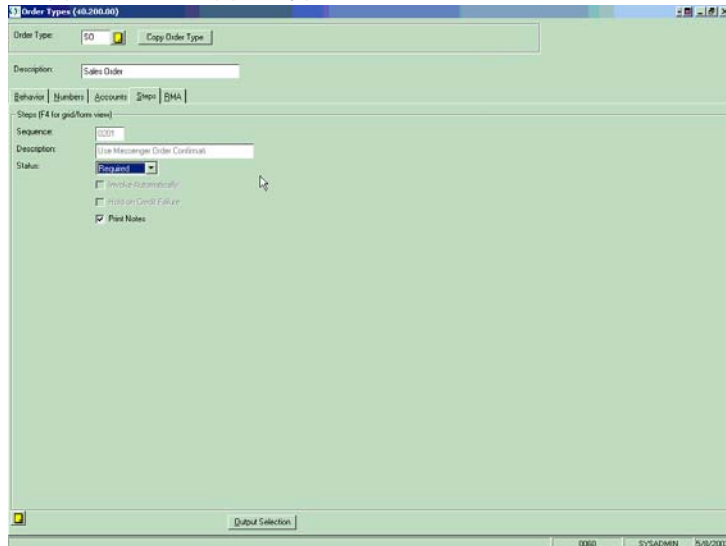
The descriptions of all Messenger steps begin with "Use Messenger <Form Type>". Additionally we add 1 number to the Sequence number of the Solomon IV form printing operation we plan on replacing or

enhancing and finally, we've created our own unique Next Function ID that one can only view when the initialize mode is enabled through Solomon IV.

To enable a Messenger step:

Double click on the respective Messenger Step. Change the Status field to Required and keep the Invoke Automatically option unchecked.

When a Messenger step is set to Required, Solomon will increment any preceding step of that order type to Messenger's function ID. Solomon IV will ignore these steps. Messenger will evaluate any Pre-shipper and Shipper type document that are set to a Messenger Function ID process.



Once selected by Messenger, the routing that is established for the respective order and function in the Properties window on the Messenger Server is then routed accordingly.

After processing, Messenger will update the Function ID to the Next enabled step in the Order Type process as established in Solomon IV.

In this manner you have complete control over your order process. We highly recommend enabling the Unattended Processing feature of Messenger for Shipper and Non-Shipper type orders.