

Liaison Software Corporation

Liaison Messenger

Configuration Guide



Liaison
Software Corporation

Liaison Messenger®

CONFIGURATION GUIDE

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TECHNICAL SUPPORT:

Support phone number: (714) 543-9877

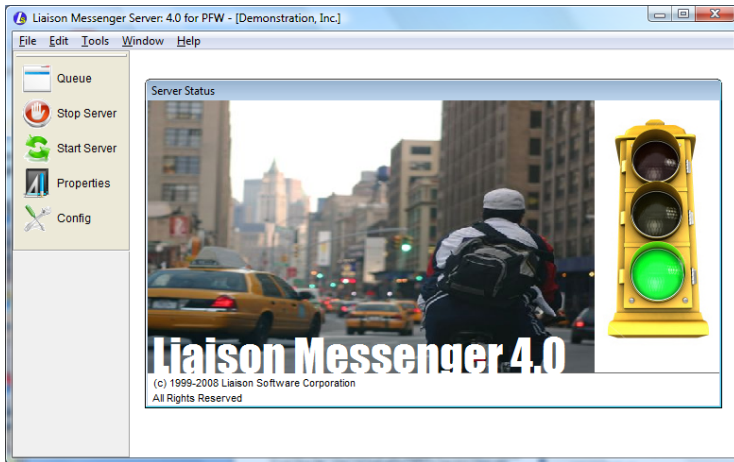
Support e-mail: support@liaisonsc.com

Website: www.liaisonsc.com

Required Keyword: (you'll need to read this manual)



1 – LIAISON MESSENGER® OVERVIEW



Whichever machine will be running Messenger Server the PC will require Microsoft SQL Server or Pervasive.SQL (or Btrieve) client engines installed, licensed and functional.

REQUIREMENTS FOR OUTPUT CAPABILITIES

Messenger provides four methods of distribution; printing, faxing, e-mailing, and archiving. In order to optimally take advantage of some of these features there are certain components you may need to acquire.

PRINTING

Messenger allows you to configure and send each part (ply) of a form to a different printer. Messenger supports the (UNC) Universal Naming Convention. This means that you are not limited by standard DOS conventions. If you have multiple laser printers in other departments, try enabling the Printing by Ply for each of the forms. You will love the convenience of not having to burst, decollate, and deliver forms to the various departments.

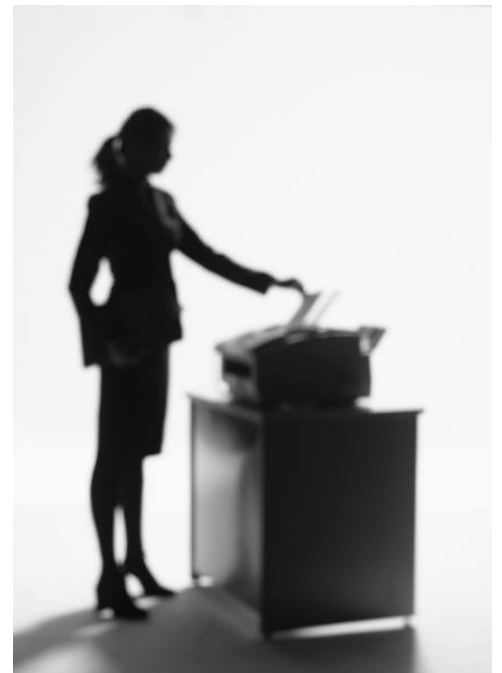
FAXING

In order for Messenger to transmit forms via facsimile, an external Fax Manager is required. We currently support a number of different solutions:

Symantec's WinFax PRO 10.01/10.04 from Symantec. With a single license running on the Liaison Messenger Server PC, Messenger can turn WinFax PRO into an unattended Forms Fax Server. A DEDICATED PHONE LINE attached to an internal or external modem is also required.

Microsoft Fax Transport in conjunction with Microsoft Outlook 2000 or newer.

Fax Servers that support Microsoft Outlook's add-in capabilities
Like RightFax, GFI or Zetafax.



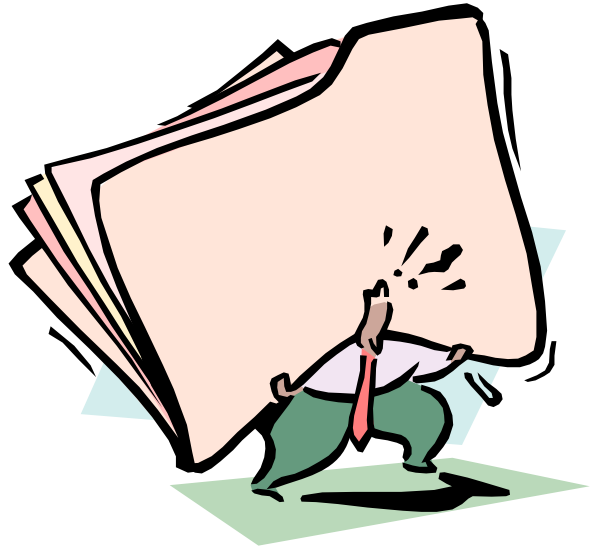
Internet faxing subscriptions like: Data On Call

In System Configuration, you can configure Messenger to utilize anyone of these methods.

ARCHIVING

An interesting and quite useful feature of Liaison Messenger is it's unique archiving ability. Instruct Messenger to archive (to disk) each form that gets processed. You simply create and then designate a unique directory/folder for each company dataset and for each form. Similar to the file format options for e-mailing, Archiving is best used in conjunction with the PDF file format.

When Messenger prints the form, it can create an electronic copy of that form in the designated directory using a simple file name convention. The first 2 characters identify the Form Type; the next set of characters is the Customer/Vendor key. Now, the next set of characters will be the first document number in that customer/vendor's run followed by the last number in the run. Finally a Date stamp is added to ensure uniqueness. Delimiting these character sets are hyphens.



This allows the user to easily retrieve a previously printed Invoice, Sales Order, or P.O. and either Print, E-mail, or Fax a copy of the original.

In a nutshell, Archiving would allow a user to quickly retrieve a previously printed invoice for, let's say Advantage Golf Pro Shop, Invoice 00023.

In Windows Explorer, navigate to K:\MYACCTSYS\TWO_INC\ARCHIVE\INVOICES and scroll down to the Customer Key ADV01, the first Invoice in the run is 00023 and the last is 00027. The invoices were printed: 06/04/2002.

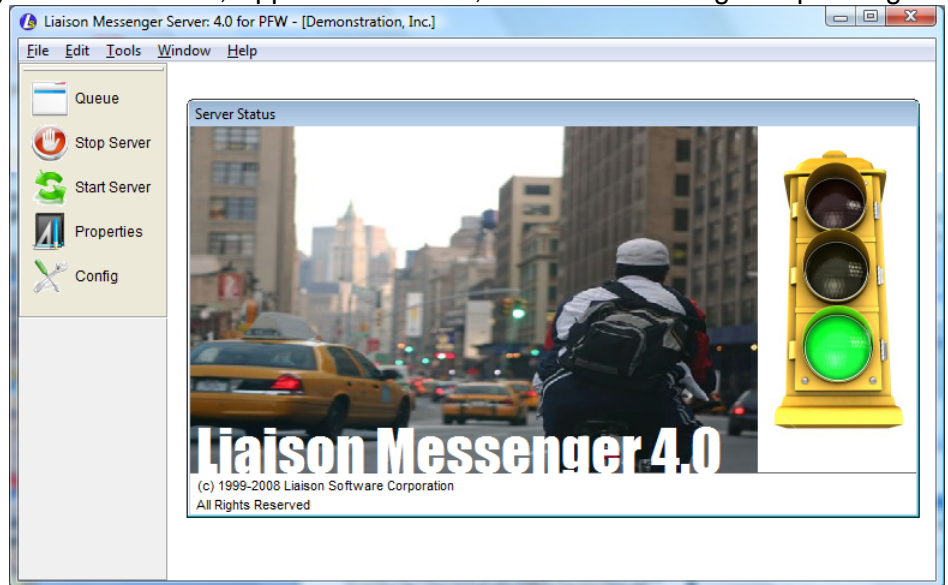
IN-ADV01-00023-00027-20020604.PDF

Also available from within Messenger Client is our 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 and allow you to easily view, print, e-mail, or fax and archived form.

Liaison Messenger now has 6 different archive naming conventions which can be specified.

Liaison Messenger® consists of two components; Messenger Server and Messenger Client. You can think of Messenger Server like you would a PAS, Application Server, or Process Manager depending on the respective Accounting System terminology. Like a PAS, the Messenger Server must be running in order to print, and post if required, any forms (i.e., any of the above invoices, sale orders, etc.).

We recommend placing a shortcut for Messenger Server in the Startup folder on the Windows NT/2000/XP/Vista workstation acting as the Messenger Server machine.



MESSENGER TERMINOLOGY

Before we get started, please note the following Print Job terms we use here and what we are referring to.

New - Orders and Invoices that have never been printed.

Rerun - Orders and Invoices that have been printed but not posted can be Rerun. Invoices have been assigned their Invoice Number, so a rerun merely prints the invoices again. (This option only applies to users of PFW and BatchMasterPFW systems.)

Recreate - this is used for orders and invoices that have already been printed and posted. Also, the Recreate feature is only available for orders and invoices that have not yet been purged from your Accounting System. Unlike rerunning a job, which is a batch run, recreates work on one order/invoice at a time.

A Recreate does not get routed to the pre-designated printers like New and Rerun jobs. The form is sent to a local printer via a standard Print Dialog box, and only the first ply is reprinted.

If you have been using the Archive capability of Messenger, you could easily retrieve and reprint the previously printed order or invoice through the Messenger Archive Manager, Windows Explorer and /or Adobe Acrobat reader.

MESSENGER SERVER

We require running the Liaison Messenger Server on a Windows NT/2000/XP/Vista Workstation or Windows NT/2000/2003/2008 Server. We say the server because typically those units are the most powerful computers on the network. Remember, Messenger can be configured to service all forms for all users. In early tests, Liaison Messenger consumed, on average, about 5% to 7% of the server's

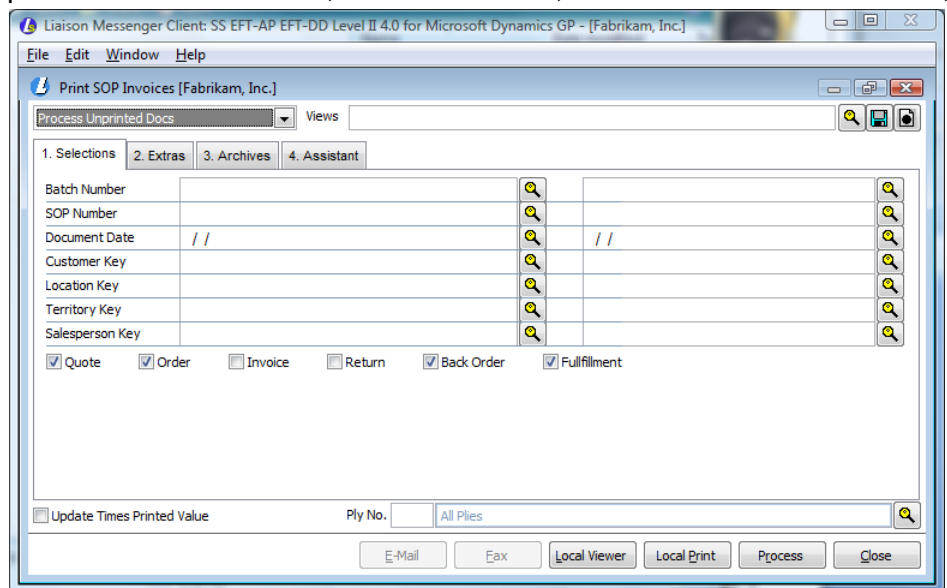
resources. Running the Messenger Server on a Windows 98/95 PC, we noticed a significant resource consumption loss after about 150 print jobs that could result in a fatal error. Windows NT does not realize this resource consumption problem.

Messenger Server can operate in two modes; one as an Unattended Forms Server and the other a Print-On-Demand Server. In the later situation, end-users utilize Messenger Client to make the Requests to print or reprint forms On-Demand.

The Unattended Server operates on a pre-determined schedule planned by the end-user or systems administrator. A typical schedule might be to Print all unprinted New Orders, Back Orders, and Quotes every 2 hours. In this manner, users would simply enter orders and Messenger Server would print, route, fax, and or e-mail those forms at the designated intervals.

Being that Messenger Server operates on one machine, in order to route, fax and e-mail to all devices, this computer must be mapped to all printers. Messenger supports the Universal Naming Convention (UNC). This allows Messenger to access all printers (DOS/Windows) configured on the server. It allows users a sufficient number of printers; local, network, and remote connected and accessed via the NT/2000/XP server.

If the faxing and e-mailing capabilities will be used, only one license of the fax or mail client would be required.



When the e-mailing portion of Messenger is enabled, the machine e-mail client/account should be configured with a messenger@companyname.com user name. This will help facilitate sending, receiving and tracking of the forms routed via e-mail and their possible return-receipts. Messenger Client

The Messenger Client component is run from each workstation that will be printing or reprinting forms. It has a single-window interface. End users initiate New, Rerun, and Recreate print jobs in Messenger Client.

Any New and Rerun job requests are serviced by Messenger Server and routed to the appropriate devices.

The Messenger Client processes Recreates of forms for Preview and Print options, locally. However, when a Recreate is requested to fax or e-mail the form, this job request is (internally) placed in the main processing queue which is monitored by Messenger Server.

This way (since the Messenger Server is doing the fax or e-mail) only a single user license of the fax software, Outlook, or PDF writer software is required to service the request of an unlimited number of users.

2 - LIAISON MESSENGER SYSTEM SETTINGS

The first time you launch Messenger Server you may be greeted with the System Configuration screen. This allows you to establish global system-wide defaults Messenger will use. These Defaults will also be used when running in Unattended Server mode. They also establish the preset selection when printing from the Messenger Client utility.

If you ever need to change the system settings once Liaison Messenger has been setup and configured, you can always choose the System Configuration option from the File menu from within Messenger Server. The System Configuration option is not available from Messenger Client.

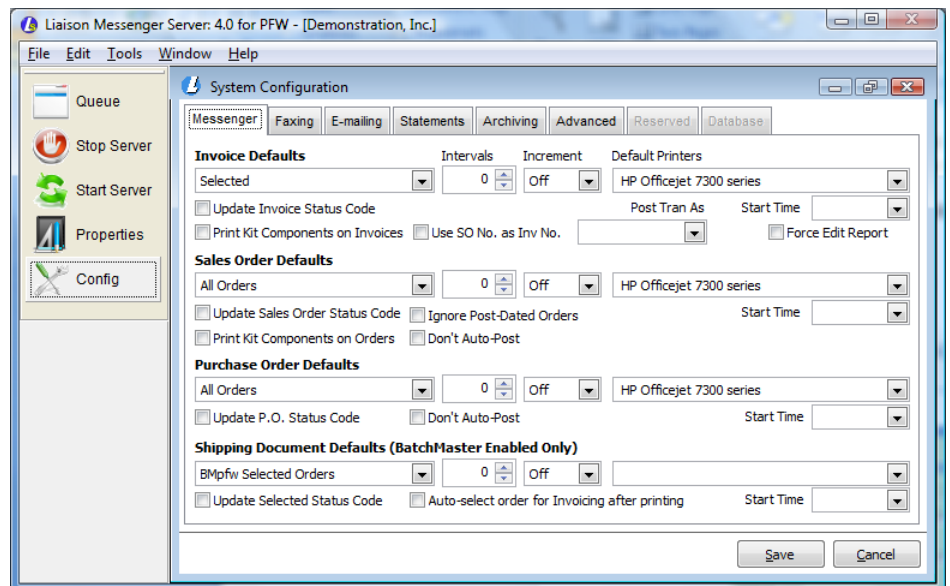
SYSTEM CONFIGURATION

MESSENGER

Here it is recommended that a Default Printer is assigned to each of the different form types displayed on the Messenger tab.

If you wish to and keep the rest of the options at their default. This includes the Interval setting of 0 and the Increment setting to Off.

Please refer to the respective Chapter in this guide that relates to your individual accounting system and/or operating environment.



FAXING

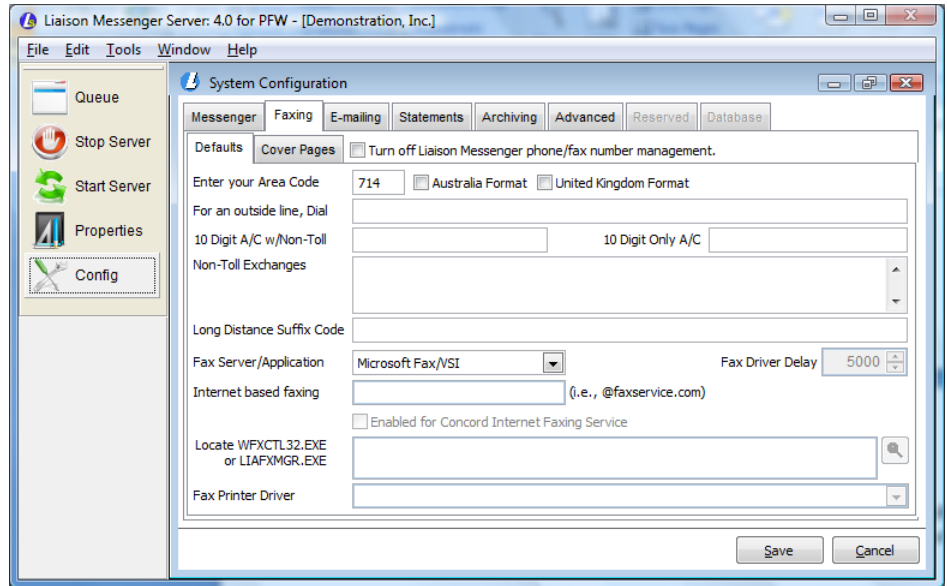
From the System Configuration window select the Faxing tab. Specify your Area Code and any outside line prefix. As we stated earlier, WinFax PRO 10.01/10.04, Microsoft Fax Transport, and almost all commercial Fax Systems/Servers with Outlook Add-In clients are currently supported. However, if you have a fax server that supports X.25 addressing, we can most likely interface to the product, please contact us for details.

10-DIGIT DIALING SCHEMAS

If you are in an area that uses 10-digit dialing, enter the Area Codes, separated by commas, and NO spaces in the designated field. When Messenger encounters a phone number from that area code, it will NOT add a 1 to the beginning of that number.

NON-TOLL EXCHANGES/PREFIXES

If you are in an area that has area codes where some prefixes are long distance and some are local (non-toll) calls. Enter the prefixes (exchanges), separated by commas, and NO spaces in the designated field. When Messenger encounters a phone number with that prefix within your Area Code, it will NOT add a 1 to the beginning of that number.



IF USING WINFAX PRO, PLEASE PERFORM THE FOLLOWING:

LOCATE WFXCTL32.EXE

Found in the main fax manager folder. This is by default located in the c:\Program Files\Symantec\WinFax folder.

FAX PRINTER DRIVER

Now choose the Winfax (printer) driver. When you are done, select Save. Do NOT select the “Send Via Fax” option. You must select the printer driver of the fax program.

FAX DRIVER DELAY

Do not change unless advised by our technical support personnel.

FAX COVER SHEETS

Under the Messenger and/or SalesSonar tabs you can specify a Cover Page for each form type. These cover sheets are created in the WinFax PRO application under the Tools menu.

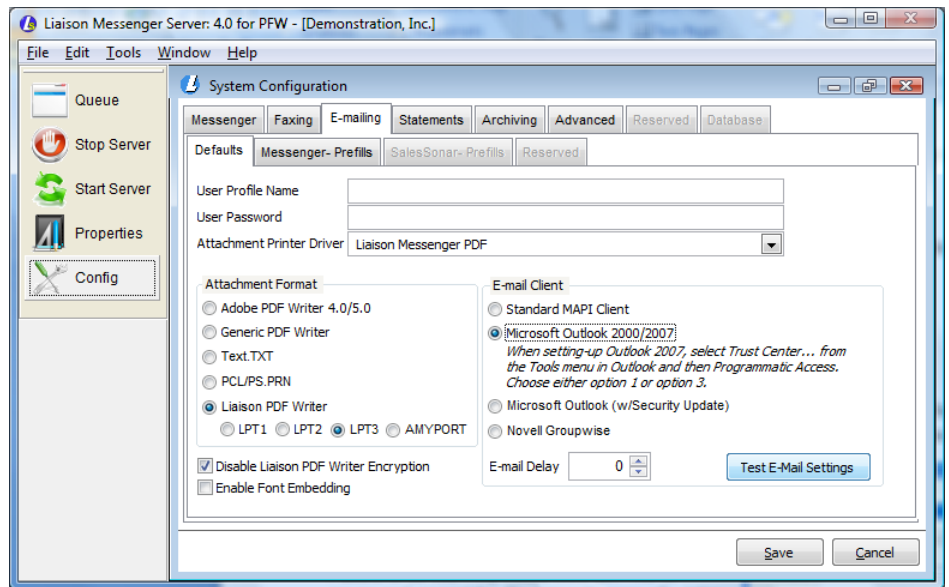
If you elect to use a WinFax PRO cover sheet, make SURE you remove the “Fill Text” blocks within the cover page. If you are unsure how to do this please call our technical support department. Failure to do this may cause WinFax PRO to pause and prompt the file server to manually enter “Text” for each form that Messenger is try to send.

STANDARD FORM FILL FOR RECREATES

This cover page option should reference a cover page with the “Fill Text” option. This way the end-user can add a message to the cover sheet before the Reprint is faxed to the recipient.

E-MAILING

From the System Configuration window select the E-mailing tab. If you only have one e-mail user profile on this machine, leave the e-mail Address, From E-mail Name, and Account Password blank. Messenger will use the default profile automatically. However if multiple profiles are configured on this PC, you will need to fill in those fields. These fields are Case Sensitive.



Since Messenger sends forms via e-mail attachments, you need to specify the Format. We strongly recommend you keep the Liaison Messenger PDF attachment printer driver as defaulted. However, you may use Adobe Acrobat 4.x or 5.x if desired. Liaison Messenger **will not** work with Adobe Acrobat 6.0 or above.

Once created, Adobe PDF files are viewable but not modifiable the standard Adobe Acrobat reader which is freely available.

Another option is PCL/PRN. This would require the recipient to copy the PRN file to the printer on their site or use a PCL viewer.

Please keep in mind that should you elect to transmit copies via e-mail, you should select a **blank paper** template so that the lines, titles, and borders print around the text/data appear on the form.

Since we recommend keeping the Liaison Messenger PDF attachment printer driver as defaulted. However, you may use Adobe Acrobat 4.x or 5.x if desired.

Next select the attachment type (Adobe PDF Writer 4.0/5.0, Generic PDF, PCL, TXT, Liaison PDF Writer) and you are done.

STATEMENTS (AKA LIAISON COLLECTOR)

Please refer to the Chapter on Liaison Collector in this guide for configuration instructions.

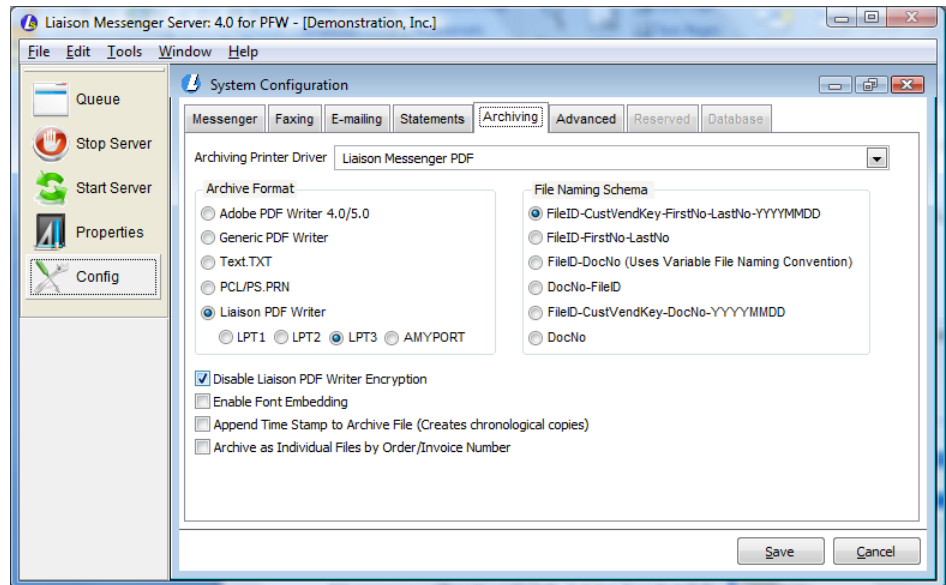
ARCHIVING

FROM THE SYSTEM CONFIGURATION WINDOW SELECT THE ARCHIVING TAB.

Again, since Liaison Messenger now includes a PDF writer, we strongly recommend you keep the Liaison Messenger PDF archiving printer driver as defaulted. However, you may use Adobe Acrobat 4.x or 5.x if desired. Liaison Messenger **will not** work with Adobe Acrobat 6.0 or above.

Archiving allows a user to quickly retrieve a previously printed form without having to reprint the form through Messenger.

When Messenger prints the form, it will create an electronic copy of that form in the designated directory using a simple file name convention. The first 2 characters identify the Form Type; the next set of characters is the Customer/Vendor key.



Now, the next set of characters will be the first document number in that customer/vendor's run followed by the last number in the run. Finally a Date stamp is added to ensure uniqueness. Delimiting these character sets are hyphens.

Also available is the Archive as Individual Files.... Option. This is used so that documents are not archive in their respective batch run.

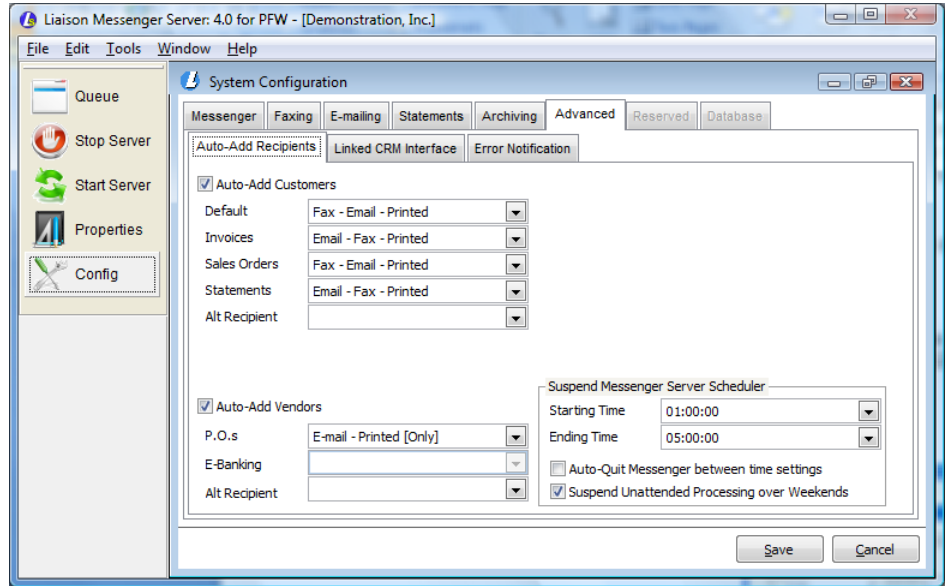
PDF ENCRYPTION

We recommend that you keep this option disabled. Users who do not have the most current Acrobat Reader would not be able to open or read the documents. The encryption is 128-bit for those interested in using this feature.

ADVANCED

Here you can specify Auto-Add capabilities for the Customer and Vendor address book and establish default business rules for assigning Recipient Preference defaults by form type.

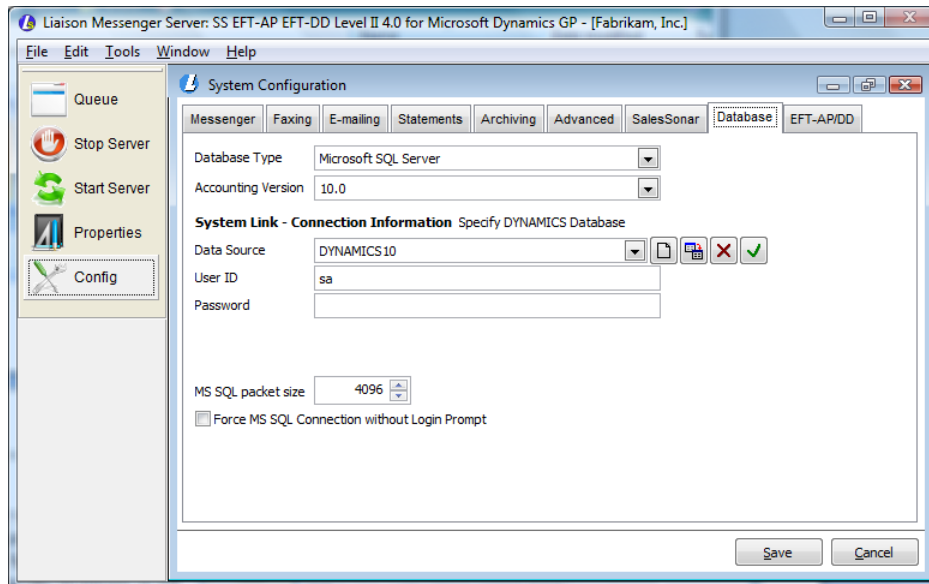
Another option on this screen allows you to setup snoozing time for Messenger. This will automatically shutdown or set as inactive, Liaison Messenger, for a certain time frame. This is primarily used for system backups on off-hours. If auto-quit is used, you must manually restart the Server or use a 3rd party application launcher.



DATABASE

IF THIS IS A PERVASIVE.SQL INSTALLATION THE DATABASE TAB IS NOT USED.

If this is a Microsoft SQL Server install of MAS 200, Microsoft Dynamics GP/SBF or Microsoft Dynamics SL, select the Database tab and enter the Data Source name you created using the ODBC Administrator or Manager for the System Database. Also, enter the User ID and password as it relates to the data source you created. You can ignore the Database and Company fields as these are generally handled under the actual ODBC connection you create.

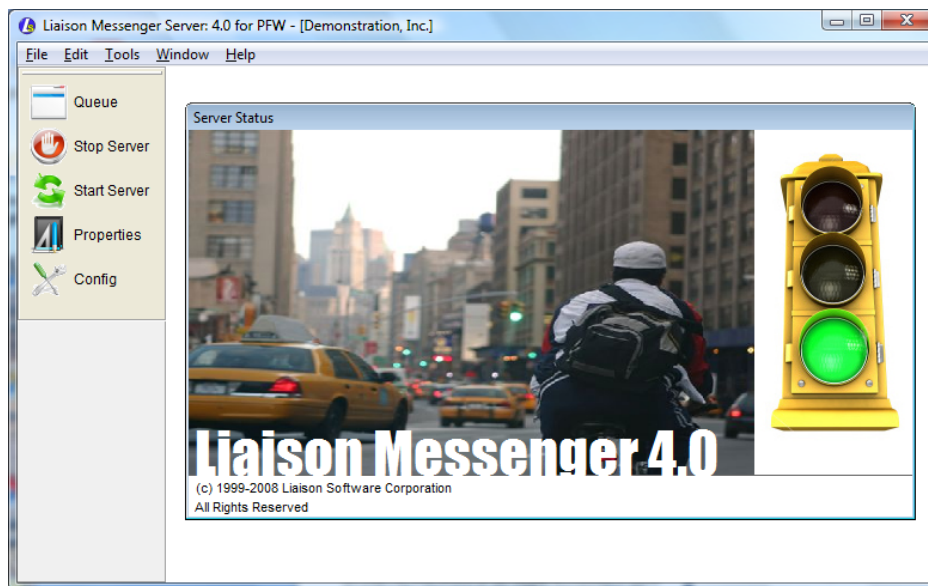


RESTARTING THE SERVER

Once you have finished making any changes within System Configuration and selected the Save picture icon, the server should automatically start. The server will automatically start every time you open the Messenger Server.

To stop the server, select Stop Server from the File menu or the Stop Server icon on the toolbar. There you can also restart the server manually with the Chasing Green Arrows icon.

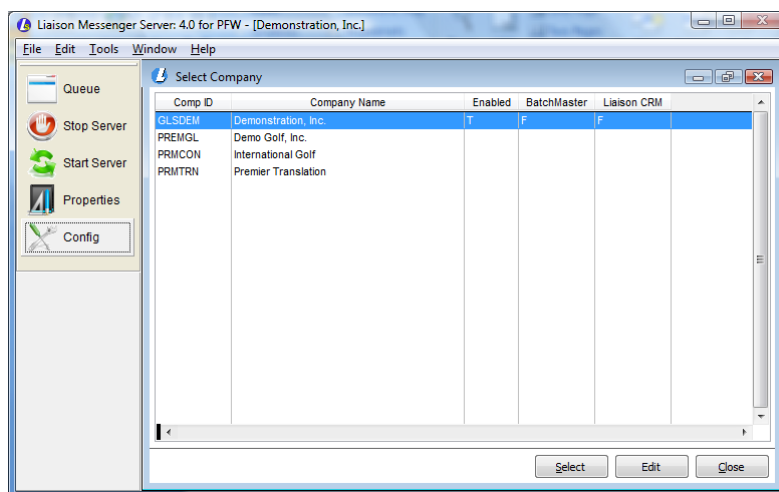
IF YOU ARE STARING AT A GREEN LIGHT, YOU'VE DONE EVERYTHING RIGHT. GOOD JOB!



ENABLING/DISABLING COMPANY DATASETS

The next step, but most important, is which companies you want to automate. By default, all companies you've established in your Accounting System have **not been enabled**. To practice, we strongly recommend enabling the system test databases first. You can then properly setup, configure, modify, and test Messenger before implementing it through Cloning..

Once you've gotten your configuration working on the test company and you want to implement it on the live company, simply select the Clone Company Properties from the File menu and replicate that configuration on the live company dataset.



Refer to the appropriate section on the two databases depending upon your specific installation.

CONFIGURE BACKEND DATABASE

Depending on the backend database your accounting system is using Messenger will act in one of two possible manners

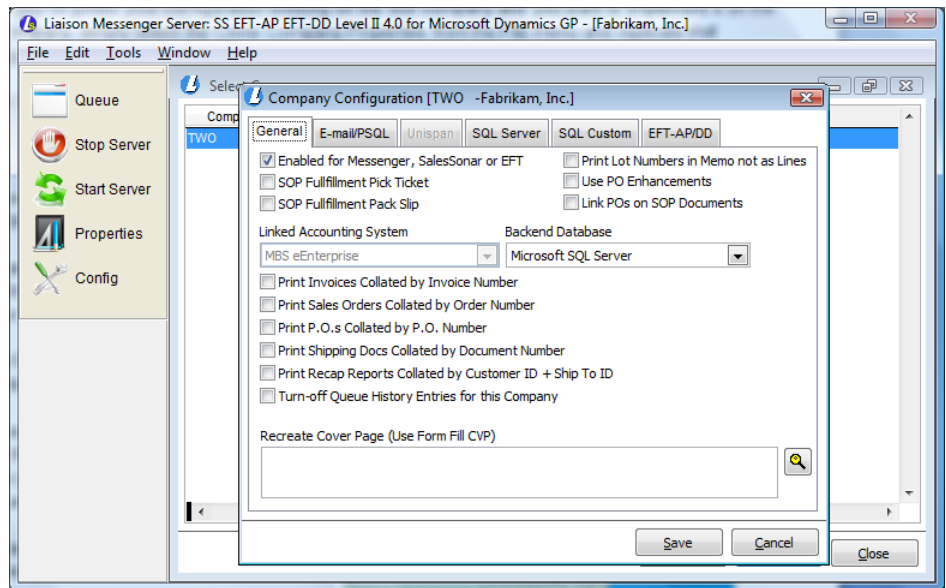
Pervasive.SQL

The first time you select this option, you may be prompted for the location of PFW, BatchMasterpfw and/or Microsoft Dynamics GP/SBF. Enter main the location of accounting application database.

For of PFW and BatchMasterpfw, Liaison Messenger is attempting locate the x:\platinum\admin\utmcfile bring in the respective companies already established.

Microsoft SQL Server

From the File menu in Messenger Server choose, Select Company Dataset. If the System Data Source name you specified in System Configuration is correct, you should be seeing all the companies in your accounting system.



For each company you wish to process under Messenger:

1. Highlight the record and choose the **Edit** button.
2. Place a check in the Enabled for Messenger/SalesSonar or EFT.
3. Specify Backend Database and select SQL Server tab (if applicable).
4. Set the desired available options/settings (outlined below) for the specific accounting system you are linking.

By default, the “Collating” options you see listed for the forms are unchecked. This is the preferred method for processing forms. If you want forms collated by form number, please call technical support before enabling because certain time-saving features of Messenger have to be disabled in order to accommodate this method. Very few people use this option.

PFW OR BATCHMASTERPFW COMPANY OPTIONS

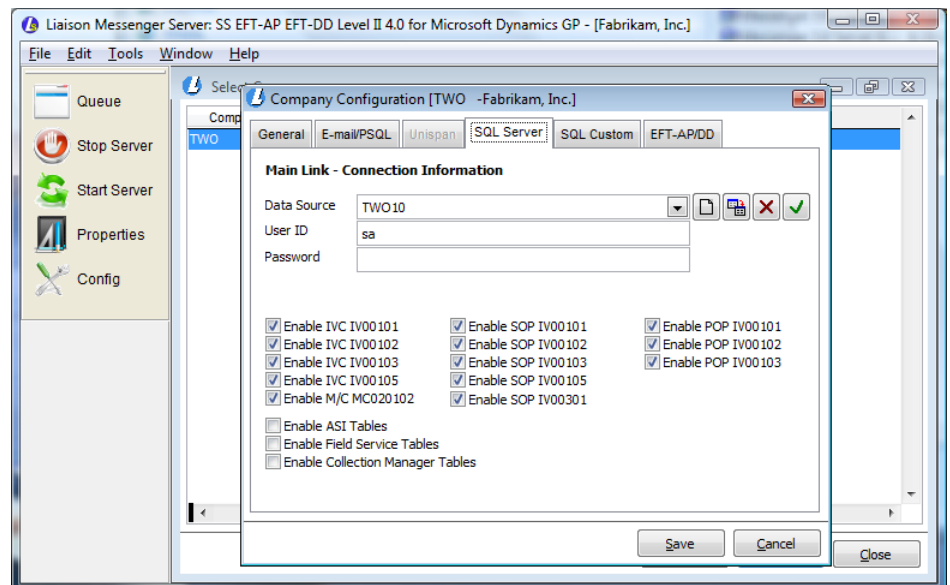
If BatchMasterPFW is used for this company, place a check in the Enabled for BatchMasterPFW option.

MICROSOFT DYNAMICS GP/SBF COMPANY OPTIONS

If the Microsoft Field Service Module for Dynamics GP/SBF is being used and data needs to be bridged on the standard forms, select this option. Also, if this company needs to include data from the Customer Item X-Ref table, enable this option.

Microsoft SQL Server

If this is a Microsoft SQL Server install of Microsoft Dynamics GP/SBF select the SQL Server tab and enter the Data Source name you created using the ODBC Administrator /Manager for this company, the User ID and password. You can ignore the Database and Company fields as these are generally handled under the actual ODBC connection you create. If this is a Pervasive.SQL installation the SQL Server tab is not used.



MICROSOFT DYNAMICS SL COMPANY OPTIONS

Liaison Messenger interfaces with Dynamics SL’s Order Management module by inserting equivalent Steps in the SO Steps table, which is defined for each Order Type. The two options we have that load and remove these steps are:

- Remove Messenger Steps in Dynamics SL
- Load Messenger Steps in Dynamics SL

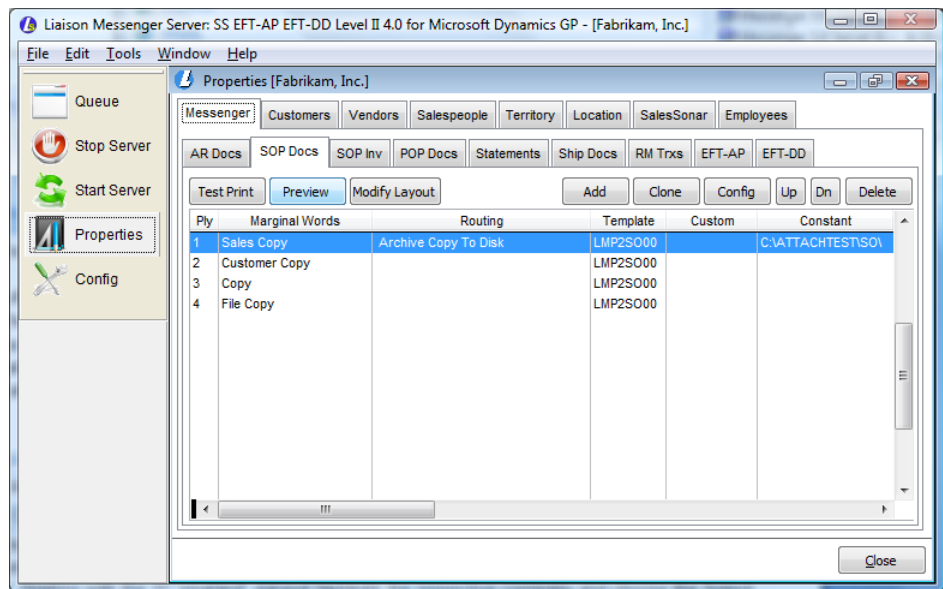
When either is checked, Messenger will Remove and/or Load these steps into the SO Steps database. By default, all options are in Bypass mode. This to prevent unwitting Order Process changes. To enable the forms processing options, you will need to invoke these Liaison Messenger Steps by setting the respective option to “Required” in Order Type maintenance in Dynamics SL.

Microsoft SQL Server

Select the SQL Server tab and enter the Data Source name of the Application Database you created using the ODBC Administrator /Manager for this company, the User ID and password. You can ignore the Database and Company fields as these are generally handled under the actual ODBC connection you create.

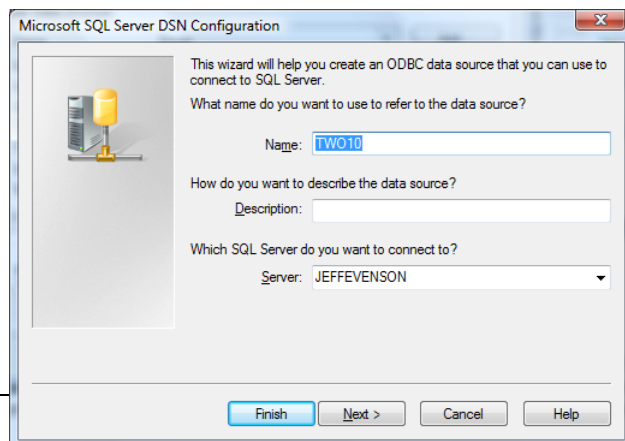
CONFIGURE REMAINING COMPANY DATABASES

Repeat the above steps for ALL Companies you wish to enable and process Liaison Messenger.



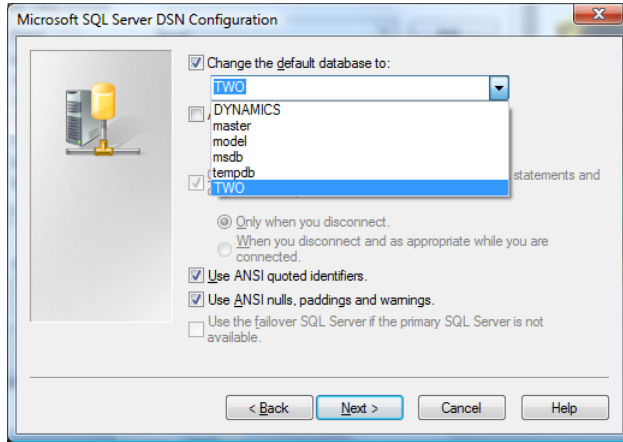
with

TESTING COMPANY DATA PATHS OR DATA SOURCE CONNECTIONS



Once you have configured your company datasets in System Configuration and Company Configuration, you will want to test the connections. From the File menu choose Select Company Dataset. Starting with the 1st “enabled” dataset highlight the respective company and choose the Select button.

Then select from the File menu, the Properties option. Go to each Form Type tab and select the Preview button.



If system paths for Pervasive.SQL or data source ODBC drivers for Microsoft SQL server have been properly setup, you will be seeing soon previewing forms with actual data.

Please note that if data does NOT exist in the company you are testing no forms will be able to be previewed.

If the Path or ODBC data source connection is invalid, you'll be receiving an error message with a corrective action description. If you do not receive an error but can't view any forms, the most logical reason is not having any test data in the select dataset.

Repeat these steps for each Company Dataset and correct any mapping issues (if any) before proceeding with the rest of the installation.

CLONING COMPANY CONFIGURATIONS

Here are the steps for turning on your live company and copying the properties from the test company.

1. SETUP AN ODBC THAT DEFAULTS TO THE LIVE COMPANY DATASET

2. In Messenger go to File | Select Company Dataset
3. Single click on Live company and choose Company Configuration
4. Check Enabled for Messenger box
5. Choose SQL Server tab
6. Type ODBC name, ID and Password for Live company ODBC
7. Click Save

8. Double click Live Company to Select
9. Click No when asked to Restart Server
10. Go to File | Clone Company Properties

11. Click yellow lookup button and select Test company as Source Company
12. Click yellow lookup button and select Live company as Target Company
13. Check the boxes for the Forms to Include
14. Click the Clone button.
15. A message will prompt you when cloning is complete. Click OK

16. Next you will need to load in the Customer, Vendor and Salesperson data from the Live company.
17. Go to File | Properties
18. Click the Customers tab
19. Click the Add button - an Import window will open
20. Click the Import button

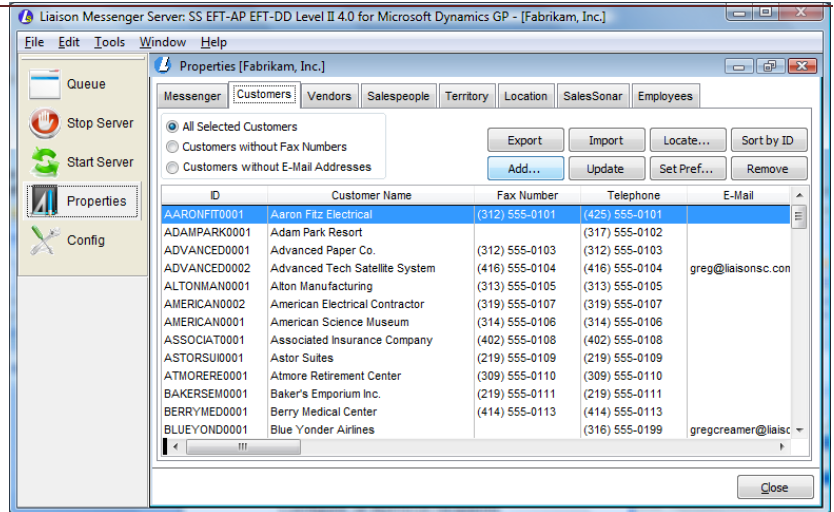
REPEAT FOR THE VENDOR AND SALESPERSON TABS.

3 – PROPERTIES; RECIPIENT PREFERENCES

CUSTOMER AND VENDORS

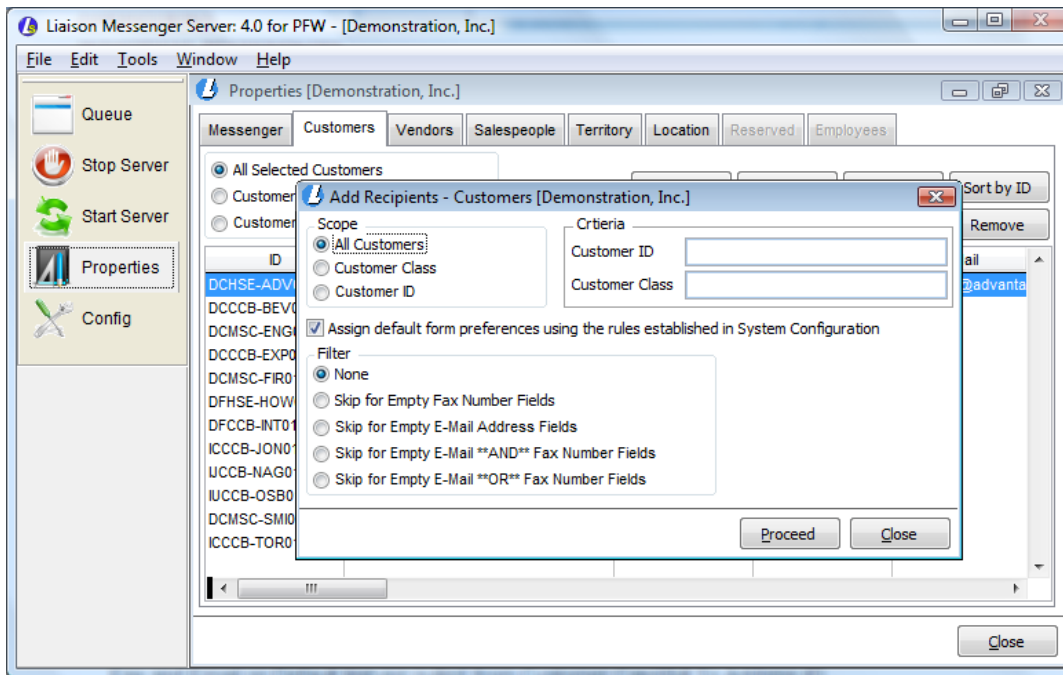
In order to fax or e-mail customers and vendors, they must be established in the Messenger Address book.

On the Properties windows are tabs for Customers and Vendors as well as other recipients. Each tab allows you to Add, Configure, or Remove recipients.



IMPORTING RECORDS

Selecting the Add button will call the Import dialog box. Messenger will import from your linked Accounting System the respective customers and vendors based upon the criteria you selected.



Once imported, their fax numbers and e-mail addresses will be maintained in Messenger. You can always go back and refresh missing Customers or Vendors whenever you wish.

Once you've imported your recipients you will want to establish defaults for them. Highlight the respective records and select the

Update button. You could also double-click the record.

	A	B	C	D	E	F	G
1	compi	custid	compname	custcls	shipto	defpref	deftele
2	TWO	AARONFIT0001	Aaron Fitz Electrical	USA-ILMO-T1		1	(425) 555-0101
3	TWO	ADAMPARK0001	Adam Park Resort	USA-INMI-T2		1	(317) 555-0102
4	TWO	ADVANCED0001	Advanced Paper Co.	USA-ILMO-T1		1	(312) 555-0103
5	TWO	ADVANCED0002	Advanced Tech Satellite System	CAN-ONMBSK-T6		4	(416) 555-0104
6	TWO	ALTONMAN0001	Alton Manufacturing	USA-INMI-T2		3	(313) 555-0105
7	TWO	AMERICAN0002	American Electrical Contractor	USA-IAKSNE-T3		1	(319) 555-0107
8	TWO	AMERICAN0001	American Science Museum	USA-ILMO-T1		1	(314) 555-0106
9	TWO	ASSOCIAT0001	Associated Insurance Company	USA-IAKSNE-T3		1	(402) 555-0108
10	TWO	ASTORSU0001	Astor Suites	USA-INMI-T2		1	(219) 555-0109
11	TWO	ATMORERE0001	Atmore Retirement Center	USA-ILMO-T1		1	(309) 555-0110
12	TWO	BAKERSEM0001	Baker's Emporium Inc.	USA-INMI-T2		1	(219) 555-0111
13	TWO	BERRYMED0001	Berry Medical Center	USA-MNWI-T4		1	(414) 555-0113
14	TWO	BLUEYOND0001	Blue Yonder Airlines	USA-IAKSNE-T3		1	(316) 555-0199
15	TWO	BOYLESCO0001	Boyle's Country Inn's	AUSTRALIA-T8		1	(039) 555-0114
16	TWO	BREAKTHR0001	Breakthrough Telemarketing	CAN-PQMT-T5		1	(504) 555-0115
17	TWO	CASTLEIN0001	Castle Inn Resort	CAN-ONMBSK-T6		1	(613) 555-0117
18	TWO	CELLULAR0001	Cellular Express	USA-ILMO-T1		1	(312) 555-0118
19	TWO	CENTERSU0001	Center Suite Hotel	USA-MNWI-T4		1	(800) 555-0119
20	TWO	CENTRALC0001	Central Communications LTD	USA-ILMO-T1		1	(312) 555-0120
21	TWO	CENTRALD0001	Central Distributing	USA-MNWI-T4		1	(608) 555-0155
22	TWO	CENTRALI0001	Central Illinois Hospital	USA-ILMO-T1		1	(309) 555-0122
23	TWO	COLOWINE0001	Coho Winery	USA-ILMO-T1		1	(317) 555-0163

CONFIGURING INDIVIDUAL PREFERENCES

Each Customer and Vendor is different. Some customers might want their Invoices printed and mailed but want their Order faxed as Acknowledgements. They might also have a different fax number or e-mail

address for each of their forms. You can determine these settings on this screen. Please note that changing any value here will not affect your linked Accounting System databases even though the data originally came from your Accounting System.

Customer Preferences [ADVANCED0002-Advanced Tech Satellite System]

Preference: Default | Fax Number: (416) 555-0104 | E-mail Address: greg@advancedtech.com

Messenger: SalesSonar | Reserved | Last Reviewed: //

Preference	Fax Number	E-mail Address
Invoices	E-mailed	
Sales Ord's	Faxed	
Statements	E-mailed	apdept@advancedtech.com
Alternate		

Auto-Send Statement Options

Auto-Send Statement if Aging is over x Days: -1 (-1 Days) Uses System Configuration defaults, (0 Days) excludes Customer from monitoring

Minimum Days between re-sent Statements: -1

Fax Cover Sheet: [Search Icon]

Buttons: Save, Cancel, Close

Once you're satisfied with your configuration, select the Save button to record your changes.

A similar screen is available for vendors. This is performed on from the Vendors tab. The vendors screen is a little easier

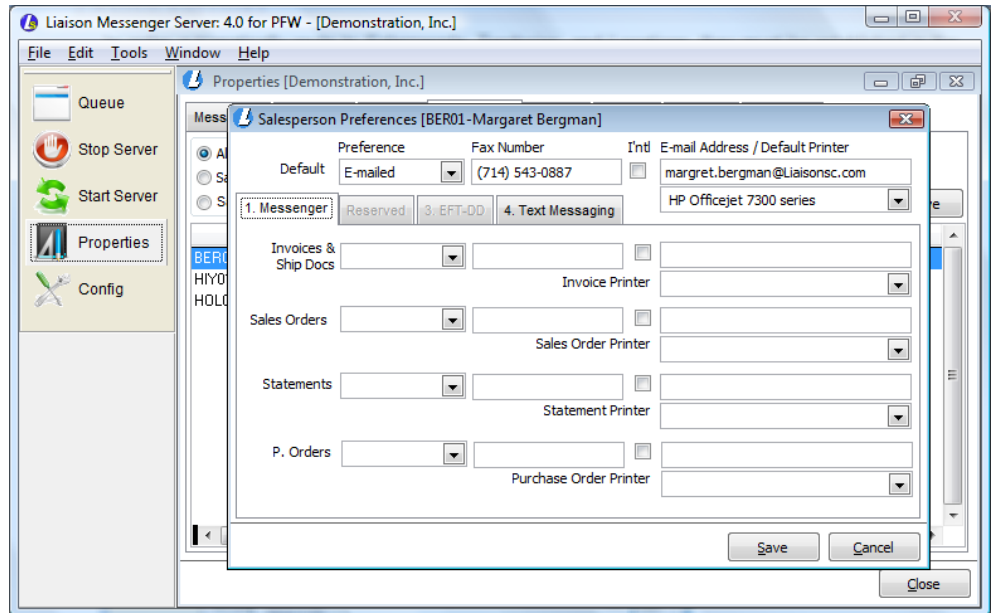
in that it only deals with Purchase Orders.

SALESPeOPLE, TERRITORIES, AND LOCATIONS

IMPORTING RECORDS

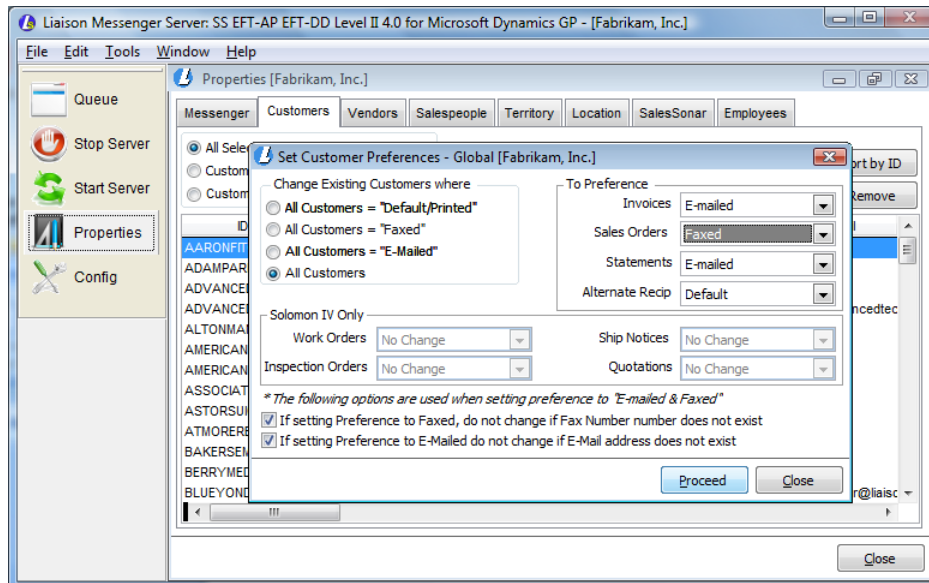
In order automatically route to Salespeople, Territories, and Locations, they must be established in the Messenger Address book. On the Properties windows are tabs for Salespeople, Territories, and Locations as well as Customers and Vendors. Each tab allows you to Add, Configure, or Remove recipients.

Selecting the Add button will automatically bring in these codes from the linked Accounting System.



CONFIGURING INDIVIDUAL PREFERENCES

Like customers and vendors, Messenger allows you maintain individual fax numbers, e-mail address, and default printers for each Salesperson, Territory, and Location. This also includes unique settings for each form type.



Using the new Salespeople, Territories, and Locations preferences allows you to easily identify and route to these recipients or locations. In Properties you can now add routing options like 'Send to Salesperson', 'Send to Location', etc... Messenger will create the needed filters and route to the respective recipient in the manner you specify (e.g. e-Mail, Fax, or Print).

GLOBALY CONFIGURING CUSTOMER AND VENDORS PREFERENCE

Fax and Email on Default line are pulled from Customer Card/Bill To Address ID

These are maintained in your accounting system.

Note: if an email/fax is changed in GP it will be updated for the customer in Messenger when a document is processed for the customer. If the field is blanked out in GP the value WILL NOT be erased in Messenger. The value will need to be deleted in Messenger and the preference will need to be change.

Values set under the Messenger tab take precedent over the Default line. These are maintained in Messenger and do no write back to Great Plains.

Examples:

Sales Ord's pref set to Faxed with 714-543-0887 as the fax number would fax Sales Orders to 714-543-0887.

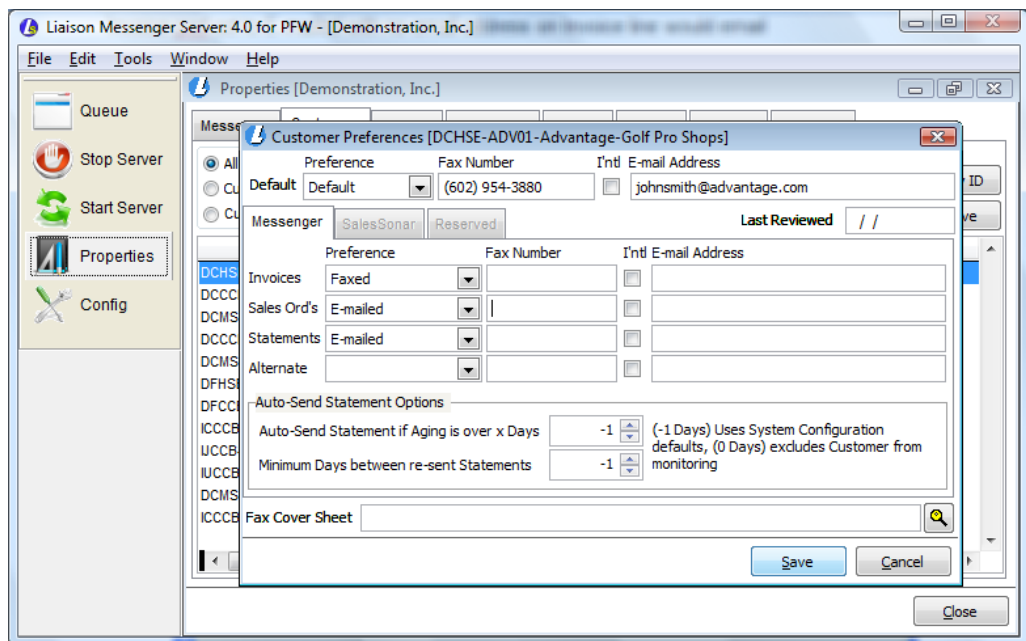
Invoice pref set
E-mailed with no
email address on
Invoice line
would email

Invoice to the
address on the
Default line.

Statements pref
to Default. This
read the Default
and Stmt will
print.

There is also an
Alternate

Preference field which follows the same rules. See page 2 below for Ply Routing settings related to the Alternate Preference.



to

set
will
line

The Ply Configuration | Routing tab settings determine which Customer Preference is used.

With a Printer set as the Routing Method and a Cascade of 'Use Recipient's Preference' the ply will be routed to the preference set for the customer.

You also have the option of sending the ply to the preference if the National Account.

Form Ply Configuration

Ply No. 1 Form ID SALEORD

1. Appearance 2. Routing 3. Data 4. Filters 5. Options 6. Email Text

Routing Method: WLIAISON_HOST\HP LaserJet 4050 Series

Device/Path: IP_192.168.0.5

Cascade: Use Recipient's Preference

Data Format:

Attention:

☐ Send Data File to Disk as Individual Files by Recipient

☐ Send ASCII Form to Disk as Individual Files by Order/Invoice Number

☐ Archive Forms by Recipient ID Under Specified Folder

Constant Fax Number/E-Mail Address/Archive/Disk/Data Folder Only:

User Preference Override:

- ☒ Default Fax/E-Mail
- ☐ Ship-To Fax/E-Mail Turn Collate On
- ☐ National Account Fax/E-Mail

☐ Modified For This Printer Only

☐ Use Linked Recipient's Preference

☐ Use Attention as Primary Default

Data File Creation:

- ☐ Detail Only
- ☐ Header Only
- ☐ Both Sets (Header & Detail)

With a Printer set as the Routing Method and a Cascade of 'Use Alternate's Preference' the ply will be routed to the Alternate preference set for the customer.

You can choose to have the fax/email address read from the values on the customer screen (User Preference Override) or you can select to have the fax/email read from the Ship To address ID

set on the order/invoice.

Note: the 'collate by order number' option must be selected in Company Configuration for the Ship To selection to work properly.

Form Ply Configuration

Ply No. 1 Form ID SALEORD

1. Appearance 2. Routing 3. Data 4. Filters 5. Options 6. Email Text

Routing Method: WLIAISON_HOST\HP LaserJet 4050 Series

Device/Path: IP_192.168.0.5

Cascade: Use Alternate's Preference/Values

Data Format:

Attention:

☐ Send Data File to Disk as Individual Files by Recipient

☐ Send ASCII Form to Disk as Individual Files by Order/Invoice Number

☐ Archive Forms by Recipient ID Under Specified Folder

Constant Fax Number/E-Mail Address/Archive/Disk/Data Folder Only:

User Preference Override:

- ☒ Default Fax/E-Mail
- ☐ Ship-To Fax/E-Mail Turn Collate On
- ☐ National Account Fax/E-Mail

☐ Modified For This Printer Only

☐ Use Linked Recipient's Preference

☐ Use Attention as Primary Default

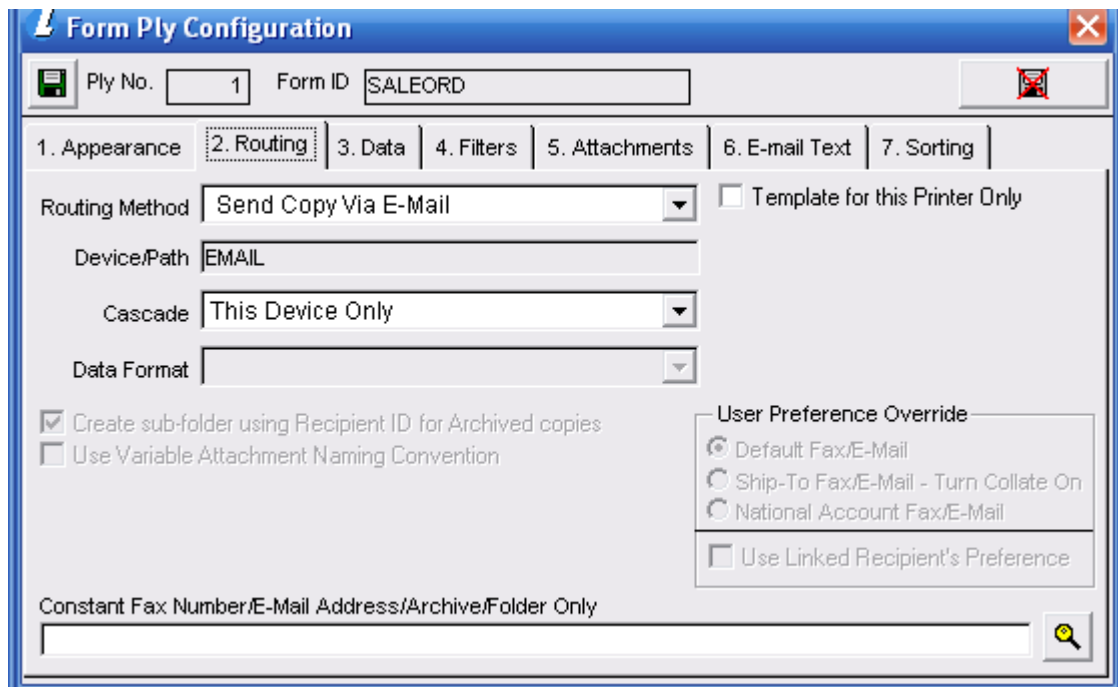
Data File Creation:

- ☐ Detail Only
- ☐ Header Only
- ☐ Both Sets (Header & Detail)

With a Routing Method set to Send Copy Via Email or Send Copy Via Fax the same rules will apply except the Customer Preference must match the Routing Method in order for the ply to process.

In other words, if the Routing Method is set to Send Copy Via Email and the Customer Preference is set to Emailed the ply

will process. If the Customer Preference is set to Faxed or Printed the ply with a Routing Method of Send Copy Via Email will not process.



The image shows a 'Form Ply Configuration' dialog box with a blue title bar and a close button. It features a tabbed interface with seven tabs: '1. Appearance', '2. Routing' (which is selected), '3. Data', '4. Filters', '5. Attachments', '6. E-mail Text', and '7. Sorting'. Below the tabs, there are several configuration options. At the top, there are fields for 'Ply No.' (containing '1') and 'Form ID' (containing 'SALEORD'). The 'Routing Method' is set to 'Send Copy Via E-Mail' in a dropdown menu. To its right is an unchecked checkbox labeled 'Template for this Printer Only'. Below this, the 'Device/Path' is set to 'EMAIL' and the 'Cascade' is set to 'This Device Only' in dropdown menus. The 'Data Format' is also in a dropdown menu. There are two checkboxes on the left: 'Create sub-folder using Recipient ID for Archived copies' (checked) and 'Use Variable Attachment Naming Convention' (unchecked). On the right, there is a 'User Preference Override' section with three radio buttons: 'Default Fax/E-Mail' (selected), 'Ship-To Fax/E-Mail - Turn Collate On', and 'National Account Fax/E-Mail'. Below these is an unchecked checkbox for 'Use Linked Recipient's Preference'. At the bottom, there is a text field labeled 'Constant Fax Number/E-Mail Address/Archive/Folder Only' and a magnifying glass icon.

In Sales Transaction Entry click the blue arrow to the right of the Customer ID

Microsoft Dynamics GP

File Edit View Tools Transactions Inquiry Reports Cards Extras Windows Help

sa The World Online, Inc. 4/12/2007

system admin's Home


Thursday, April 12, 2007

Sales Transaction Entry

Save Delete Void Post Transfer Purchase Confirm Copy

Type/Type ID: Invoice STDINV Date: 4/12/2007

Document No. STDINV2293 Batch ID: SOP ORDERS

Customer ID: AARONFIT0001  Default Site ID: WAREHOUSE

Customer Name: Aaron Fitz Electrical Customer PO Number:

Ship To Address: WAREHOUSE 1505 E. Main Street Currency ID: Z-US\$

Line Items by Order Entered

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
333PROC	<input type="checkbox"/>	Each	1	\$239.95	\$239.95
	<input type="checkbox"/>		0.00	\$0.00	\$0.00

Amount Received: \$0.00 Subtotal: \$239.95

Terms Discount Taken: \$0.00 Trade Discount: \$0.00

On Account: \$239.95 Freight: \$0.00

Miscellaneous: \$0.00

Tax: \$0.00

Total: \$239.95

by Document No. Document Status

Messenger pulls the email/fax based on the Bill To Address ID on this screen per document

Microsoft Dynamics GP

File Edit View Tools Transactions Inquiry Reports Cards Extras Windows Help

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system admin's Home


Thursday, April 12, 2007


Sales Customer Detail Entry

Customer ID: AARONFIT0001 Customer PO Number:

Name: Aaron Fitz Electrical ☐ Ship Complete Document

Type/Type ID: Invoice

Document No. STDINV  PRIMARY

Customer ID: AARONFIT0001  Bill To Address ID: WAREHOUSE

Customer Name: Aaron Fitz Electrical

Ship To Address: WAREHOUSE

Display: ☒ Bill To Address ☐ Ship To Address

Name: Aaron Fitz Electrical

Contact: Bob Fitz

Address: One Microsoft Way Suite 5150

City: Redmond

State: Washington

ZIP Code: 98052-6399

Country Code: USA

Shipping Method: LOCAL DELIVERY

Ship To Tax Schedule ID: USASTCITY-6*

Price Level: RETAIL

UPS Zone:

Payment Terms: Net 30

Salesperson ID: PAUL W.

Territory ID: TERRITORY 1

Tax Registration No.: Tax Registration

Tax-Exempt 1: Tax Exempt1

Tax-Exempt 2: Tax Exempt2

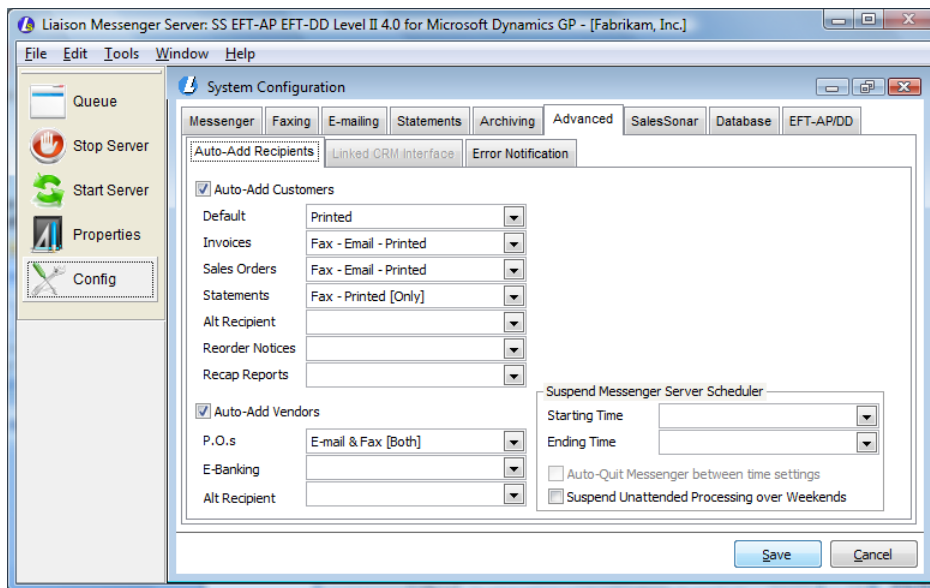
OK Cancel

From the Customer and Vendor Tab there is a Set Pref... button. Use this feature to globally configure the routing options for the recipients.

Here you can globally change or update Customer/Vendor preferences based on their Status.

AUTOMATICALLY ADDING NEW CUSTOMERS AND VENDORS

You can instruct Messenger to automatically add new Customers, Vendors, etc... to the Recipient Address book and establish pre-defined rules for new recipients.



For example you may want to automatically set all new customers to receive Invoices via Fax if a Fax Number is present. Maybe you want Sales Order Acknowledgements e-mailed. You choose the rules and Messenger will follow them.

This feature can be turned on in System Configuration on the Advanced tab.

Steps to globally set recipient preferences.

Use the Set Pref button on the Customers tab in Properties to globally change the preferences.

It will be run once for each preference. The first run will be for the most desired routing.

Example1: Choose All Customers in the 'Existing' section and Emailed for the Statement 'To Preference' the click Proceed.

This will change the preference to Emailed for any customers that have an email address.

Set Customer Preferences - Global

Proceed Selected Company

Change Existing Customers where

☐ All Customers = "Default/Printed"
☐ All Customers = "Faxed"
☐ All Customers = "E-Mailed"
☒ All Customers

To Preference

Invoices
 Sales Orders
 Statements
 Alternate Recip

Solomon IV Only

Work Orders
 Inspection Orders
 Ship Notices
 Quotations

* The following options are used when setting preference to "E-mailed & Faxed"

☒ If setting Preference to Faxed, do not change if Fax Number number does not exist
☒ If setting Preference to E-Mailed do not change if E-Mail address does not exist

The second run is for the other routing.

Example2: Choose All Customers = Default/Printed for the 'Existing' and Faxed for the Statement 'To Preference'

This will change the preference to Faxed for and customers with a fax that are not already set to Emailed.

Any that do not have a fax or email will stay as default/blank and will be printed.

Set Customer Preferences - Global

Proceed Selected Company

Change Existing Customers where

☒ All Customers = "Default/Printed"
☐ All Customers = "Faxed"
☐ All Customers = "E-Mailed"
☐ All Customers

To Preference

Invoices
 Sales Orders
 Statements
 Alternate Recip

Solomon IV Only

Work Orders
 Inspection Orders
 Ship Notices
 Quotations

* The following options are used when setting preference to "E-mailed & Faxed"

☒ If setting Preference to Faxed, do not change if Fax Number number does not exist
☒ If setting Preference to E-Mailed do not change if E-Mail address does not exist

Thank you for reading this manual the hidden keyword is **Bratwurst**. Now you are entitled to receive Technical Support.

4 – PROPERTIES; PLIES, ROUTING, FAXING, EMAILING

ESTABLISHING WORKFLOW AUTOMATION ROUTES

Messenger is tightly integrated into your Accounting System. Evident of that are the form defaults and form templates included in Liaison Messenger.

SETTING-UP FORMS

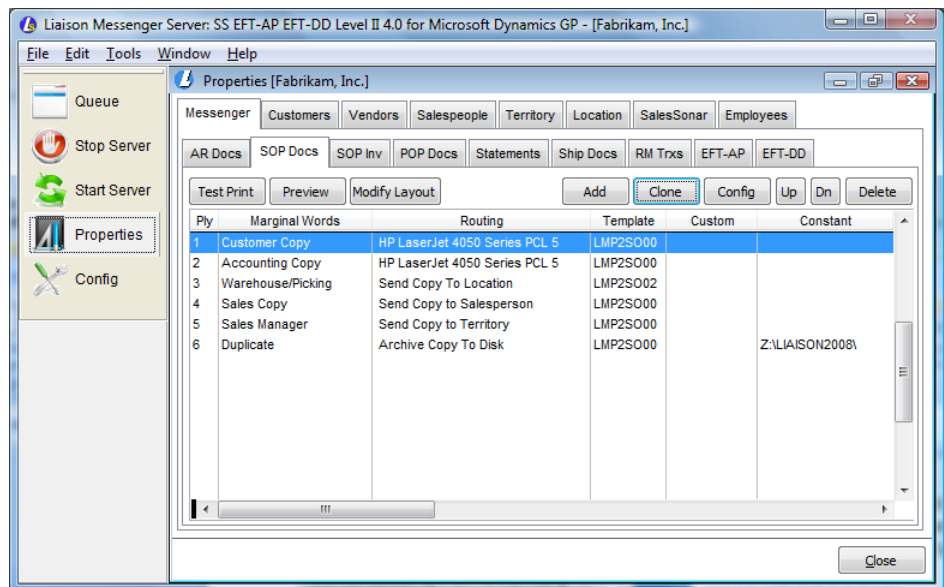
In Messenger Server choose from the File menu, Properties. The first thing you want to do is establish which printers each ply will be routed. On the Forms tab you'll find a number of tabs. One for each Form Type Each form can have from 1 to 9999 plies. But, keep in mind that these are no longer pre-printed forms. Messenger's plies are really destination points or actions, as you will discover.

FORM LAYOUT, ROUTING, AND CONFIGURATION...

From the Properties screen you will have a tab for each form type grouping. Under each form type will be plies simulating a 3 or 4 part form using the Blank Paper template option of each form.

By default Liaison Messenger includes form templates that look 100% like your existing pre-printed forms of your accounting system.

To establish a routing, change a template, specify a data block-out scheme, or create a routing filter highlight the respective ply and choose the 'Config' button.



On the Form Ply Configuration window you will see 7 tabs which are described below.

APPEARANCE

Configuring each ply is probably the most enjoyable feature of Messenger. You have complete control over most aspects of the form. You could print on Blank Paper or utilize your existing pre-printed forms.

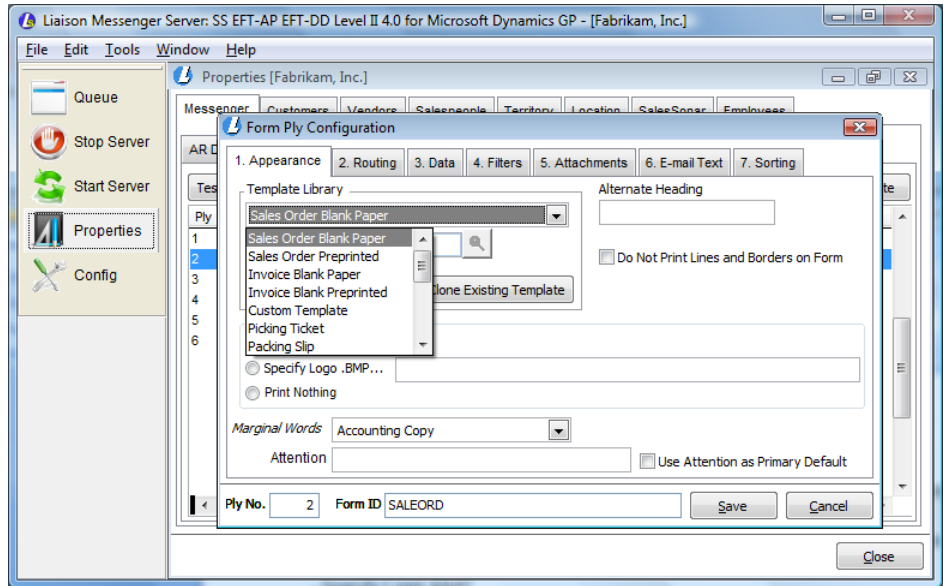
If you're configuring the ply to be faxed, you can specify a constant fax number or leave it blank to route it to the respective customer or vendor's fax number.

TEMPLATE LIBRARY

Choose the form layout you wish to use. The options with Blank Paper allow you to use standard paper and messenger will print the lines, boxes, and titles around the data. Pre-Printed options, of course, only print the data.

CUSTOM TEMPLATE

These Templates allow you to create or modify a layout to be used for this ply only. Perhaps you want to print a special form whenever a Purchase Order is printed. This form may not resemble a P.O., but it will contain data that is present on a P.O. You create a custom form so that it will print every time a P.O. prints. You could even create a filter so that this custom form only prints if a field has a particular value (i.e., location="0005").



RETURN ADDRESS

If you are using a Blank Paper Form template, specify if you want Messenger to:

- Print Company Name (and Address) of the Company Dataset
- Logo format: BMP is preferred but JPG is also OK, a JPG image will be a larger file size.
- Image Resolution: At least 150 dpi.
- Logo Size: No size restrictions but prefer the logo image size to be as close to the image size that will appear on the form.
- Specify Logo .BMP
- Print Nothing (using preprinted letterhead)

MARGINAL WORDS

You can change the Marginal Words that print at the bottom of each form. If you want to create a “custom” marginal word, go back to the Properties screen and type directly into the Marginal Word column of the Ply grid, your custom text.

ALTERNATE HEADING

If you want the heading of the form for this ply to be different, type it in hear. For example, you may wish the Customer Copy of a Sales Order to be titled, Acknowledgement. Here is where you would make that change.

Do Not Print Lines and Borders

Place a check to toggle the line and borders on the form. Used primarily on plies with Custom Template selected.

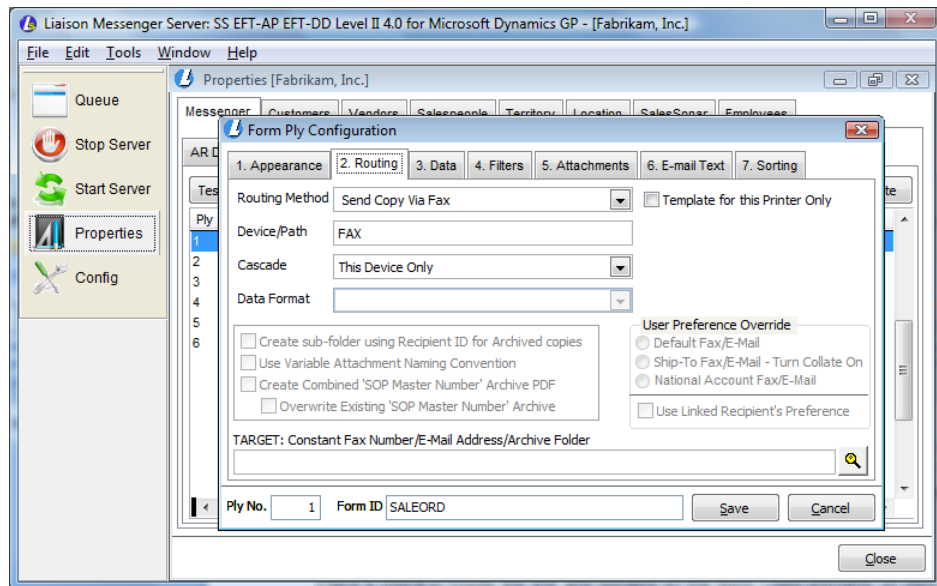
ROUTING

Choose the respective Printer you wish to send the ply to. It is VERY important NOT to select Winfax, Fax, Liaison PDF driver, or Adobe PDFWriter. Doing so will cause Messenger to prompt the user for a file name or fax number on the Server. The Fax, Winfax, and Liaison PDF printer drivers are setup in System Configuration.

CASCADE (FAX, OR E-OR PRINT)

If you want the ply to a multi-function capability (fax or e-or print) based upon customer or vendors preference, set the Cascade option of ply to **Use Recipients Preference**. When Cascade is set to Device Only, the ply only send the form to designated Routing Method. Cascade

you to incorporate logical switching or branching. This way Messenger will look at the properties of each customer or vendor and route the ply accordingly.



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Aside from the printers you’ve installed into the Control Panel and the Cascade feature, you also have a number of unique Routing Options that you may wish to implement:

Send Copy Via Fax

If want to (only) fax the ply and not print or e-mail it, choose this option. Do NOT choose the Fax (ie., WinFax) printer driver, as Messenger will not pass the respective phone number to the printer driver.

If you want all copies of the ply to be faxed to a specific fax Number, enter that fax number in the Constant Fax/E-mail/Archive/Disk/Data Folder field.

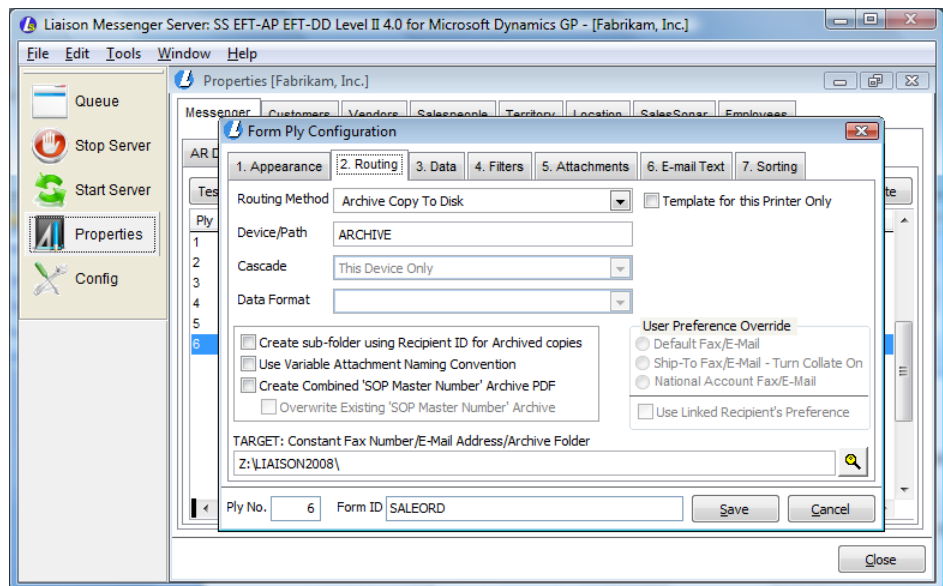
If you want a copy of the ply to be faxed to a customer or vendor, that recipient's preference must be set to receive the form(s) by fax and have a valid fax number. If the intended recipient is not setup to receive the form via fax, the ply is ignored.

Send Copy Via E-mail

If you want to (only) e-mail the ply and not print or fax it, choose this option. Do NOT choose the Liaison Messenger PDF or Adobe Acrobat printer driver.

If you want all copies of the ply to be e-mailed to a specific e-mail address, enter that e-mail address in the Constant Fax/E-mail/Archive/Disk/Data Folder Only field.

If you want a copy of the ply to be e-mailed to a customer or vendor, that recipient's preference must be set to receive the form(s) by e-mail and have a valid e-mail address. If the intended recipient is not setup to receive the form(s) via e-mail, the ply is ignored.



ARCHIVE COPY TO DISK

If want to electronically store a copy of the form to disk, you will want to choose this option. Specify the destination folder in the Constant Fax/E-mail/Archive/Disk/Data field of where you want the forms stored. Make sure you have properly setup the Archiving under System Configuration first.

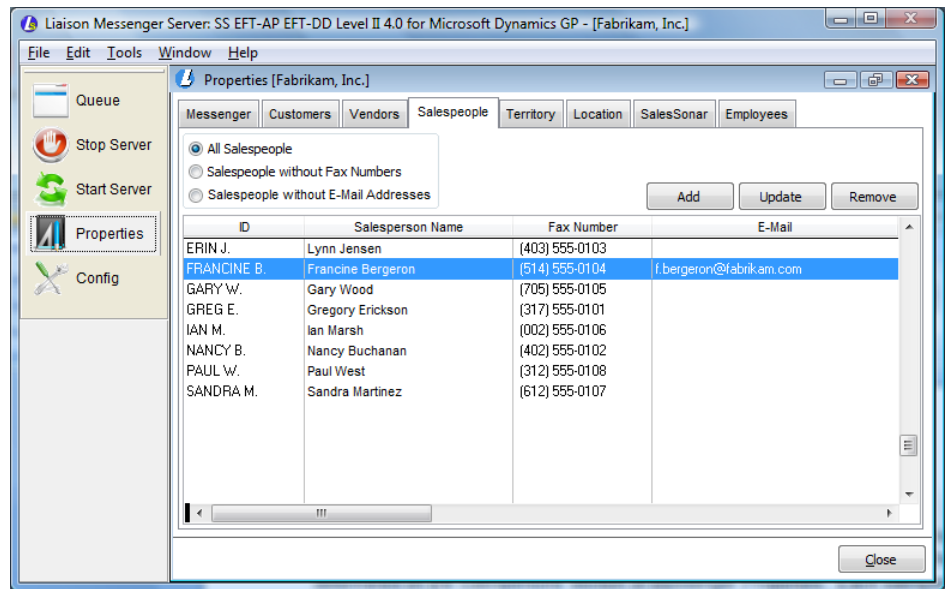
SEND COPY TO SALESPERSON

This routing method works similarly to the Cascade feature for Customers and Vendors. However, it groups all documents by the assigned salesperson key and routes the forms in the manner you've determined on the Salespersons section of Messenger Properties. Each salesperson can be setup to receive any form via e-mail, fax, or printed to a local or remote printer. You can also suppress any form type or salesperson(s) from this option, too.

Imagine automatically sending Sales copies of to the respective salesperson (in-house or remote) with no user intervention.

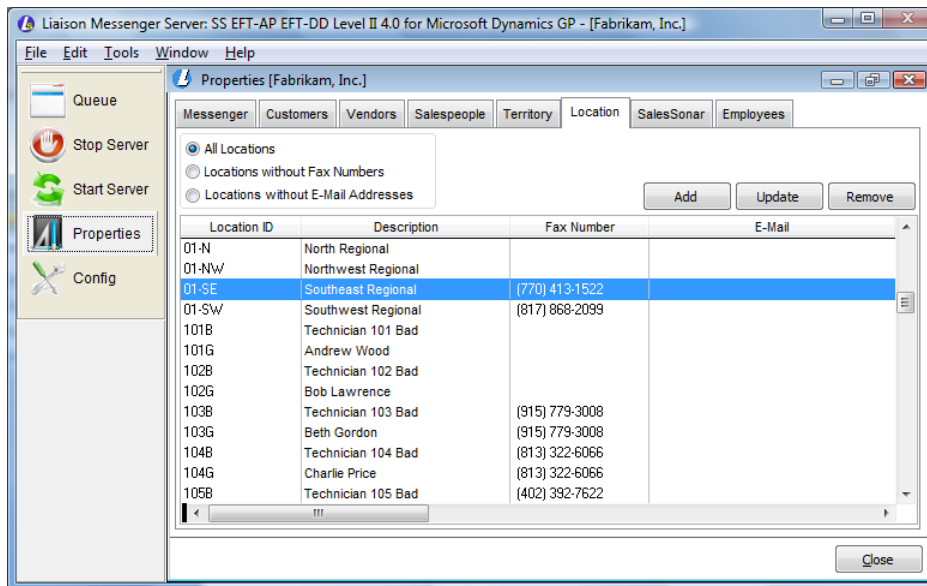
SEND COPY TO TERRITORY

This routing method works similarly to the Send Copy To Salesperson routing method. However, it groups all documents by the assigned territory key and routes the forms in the manner you've determined on the Territory section of Messenger Properties. Each grouping can be setup to receive any form via e-mail, fax, or printed to a local or remote printer. You can also suppress any form type or territory(s) from this option, too.



Imagine automatically sending Sales copies of to the respective sales manager (in-house or remote) with no user intervention.

SEND COPY TO LOCATION (AKA SITE)



Again, this routing method works similarly to the Send Copy To Salesperson routing method. However, it groups all documents by the designated Location (or Site) key and routes the forms in the manner you've determined on the Location or Site section of Messenger Properties. Each grouping can be setup to receive any form via e-mail, fax, or printed to a local or remote printer. You can also suppress any form type or territory(s) from this option, too.

Imagine automatically sending Picking Tickets to the respective warehouse (local or remote) with no user intervention. Talk about Just-In-Time processing.

SEND DATA TO DISK

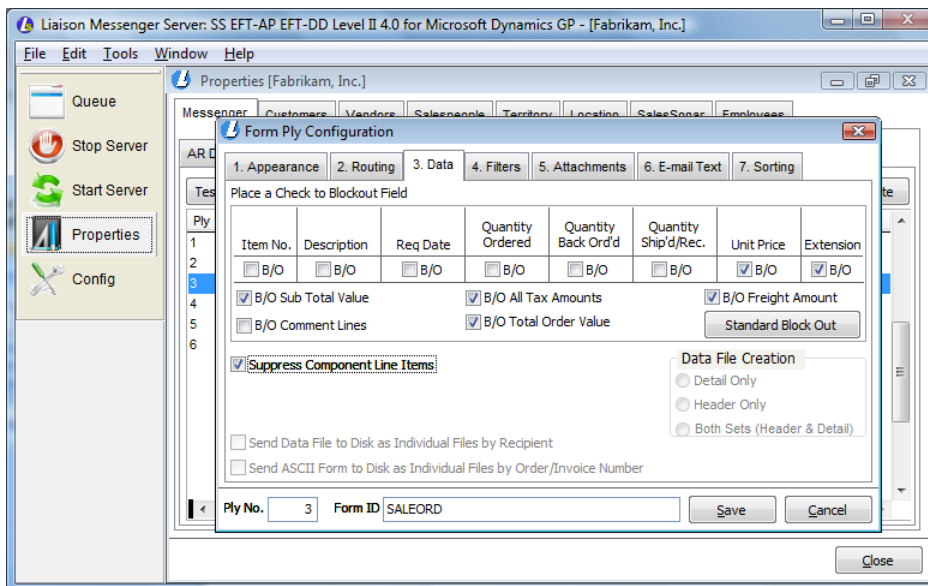
Use this method to route the “data” of the form to disk. You can output the form in the following file formats.

- SDF
- Excel Spreadsheet
- dBase/Foxpro
- Comma Delimited
- Space Delimited
- Tab Delimited

Specify the destination folder in the Constant Fax/E-Mail/Archive/Disk/Data field of where you want the data files stored.

You also have control over what is output to disk; the Header (BillTo/ShipTo) data, Detail (line items, qty, price, etc) data or both.

If you wish to **Send Data File to Disk as Individual Files by Recipient**, choose the option of the same name on this screen. Otherwise, the entire batch will be written to disk in a single file output file.



Send ASCII Form to Disk

This routing method is similar to Send Data to Disk. However, instead of providing a data file of the form, it creates a Text based image of the form. This option is useful for those companies using legacy form conversion programs that interface into heterogeneous systems.

If you wish to **Send ASCII Form to Disk as Individual Files by**

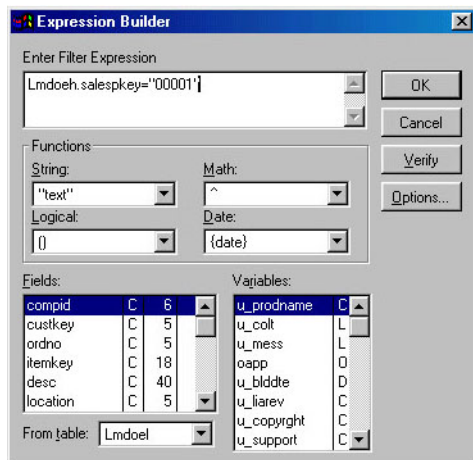
Order/Invoice Number, choose the option of the same name on this screen. Otherwise, the entire batch will be written to disk in a single file output file.

DATA

If you wish to block out monetary amounts from the form plies, select the Data tab for each ply and Check and/or Uncheck the desired fields listed on the screen. By placing a check next to the field, Messenger suppress (or block-out) the value(s) fields from printing on the form.

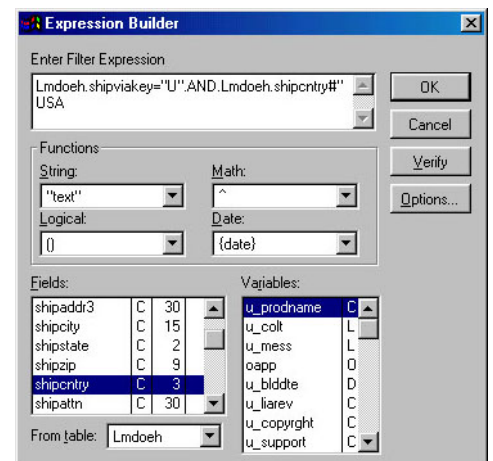
FILTER

Filtered routing is a very powerful feature of Messenger. You can specify certain plies to print, fax, e-mail, or archive ONLY when a certain condition exists.



You can create filtered routing for each form ply. Select the Filters tab to enter the expression in the Expression Builder. The syntax is dBase format. Please refer to the Database Dictionary for all fields available and their respective data types.

Simply repeat these options for each ply of every form you wish to automate. Once configured, you can forget about it.



For example, perhaps you want every salesperson to receive a copy of Sales Orders entered for accounts to which they are assigned. This copy is to be faxed or e-mailed.

You simply would add a ply and choose Send copy via "Fax or E-mail" and then create a Filter.

In the example to the right, we are creating a filter that would send a copy to the salesperson that has Salesperson Key 00001. You could then create an additional Ply for each salesperson and enter a unique filter that matches each Salesperson Key.

Another example could be as follows. You want to use the International Customs Invoice template for all shipments going UPS outside of the United States. And have this print when you run Sales Order Invoices.

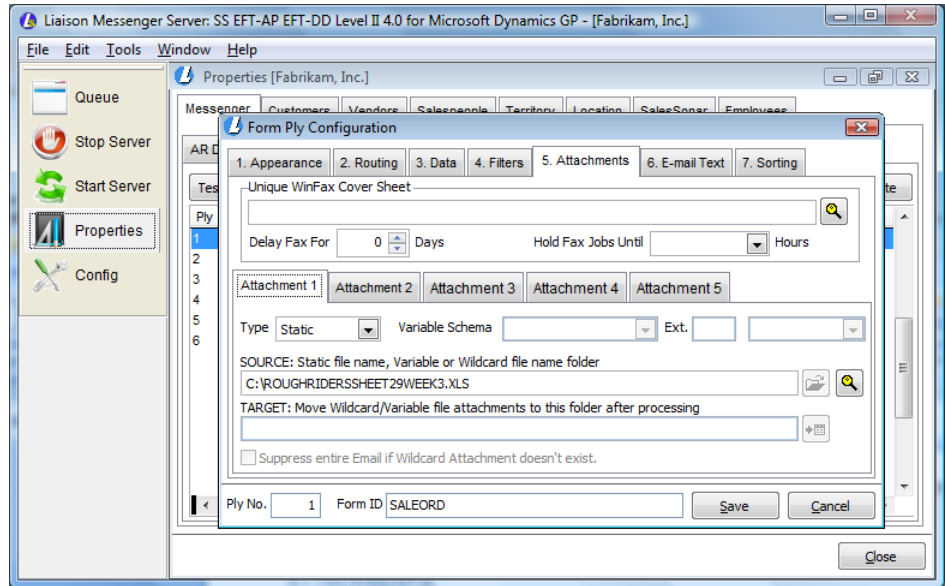
Simply add a new ply to SO Invoice, select the International Customs Invoice from the Template Library. Let's say your ship via code for UPS is "U". Select the Filters tab add a filter as follows.

Lmdoeh.shipviakey="U".AND.Lmdoeh.shipcntry#"USA"

Here we are saying only print this Ply (International Customs Invoice) when the Invoice's ship via code is "U" and the Ship To Country field is Not equal to "USA".

ATTACHMENTS

Here is where you can enhance the e-mailing and or faxing capabilities on a ply-by-ply basis. You can assign specify a unique Cover Sheet for faxing to a particular ply, template, or user-defined condition you've created with the filter expression capabilities.

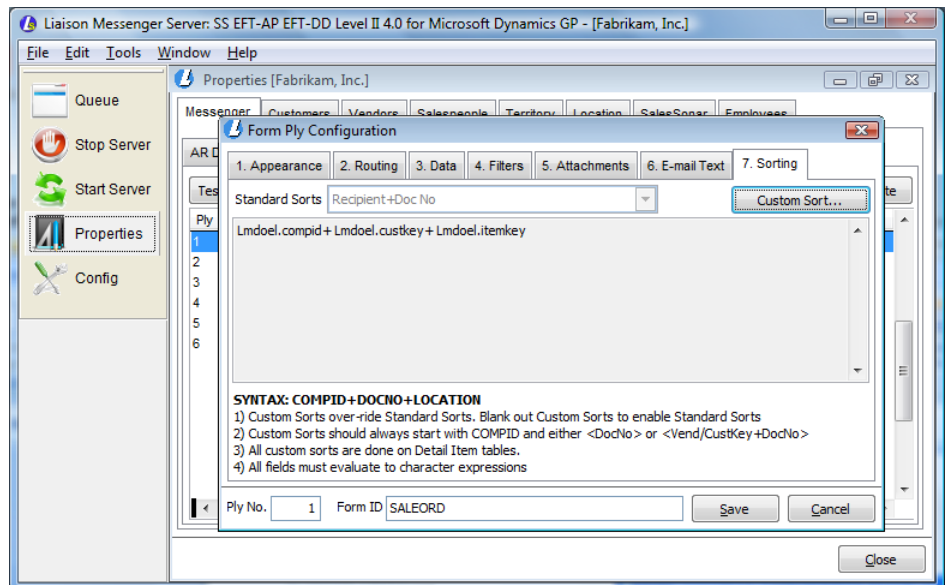


If this ply will be e-mailed, you can specify up to 1 Variable file attachment and or 4 more (or 5 static) static attachments that will accompany a e-mailed form. Perhaps you would like to include Certificate of Compliance spec sheet or Terms and Conditions file. Maybe send a Credit Application to all customers that are not setup on terms or are in a prepay status when the invoice is e-mailed.

Maybe if they bought a certain inventory class, you would like to attach a special offer or promo and have it expire in 2 months. The solution is as easy as this is written.

E-MAIL TEXT

This tab is used to create a special e-mail subject and text body for e-mails sent from this ply. This will over-ride any default e-mail subject/body text specified in System Configuration.



SORTING

If you want to change the

order of how the form plies are printed, choosing this drop down list will provide you with different sorting options.

If you need to create a sort which drop down list does not contain you can create a custom sort by choosing the Custom Sort... button.

Here you will be brought to the Expression Builder window. Unlike creating a filter expression, which must evaluate to either a True/False statement, an Index expression must evaluate to the same Data Type. This means if you sort expression will contain character and numeric data types, a data conversion function will be needed to convert the numeric values to characters.

Fields are strung together in order of their sort priority.

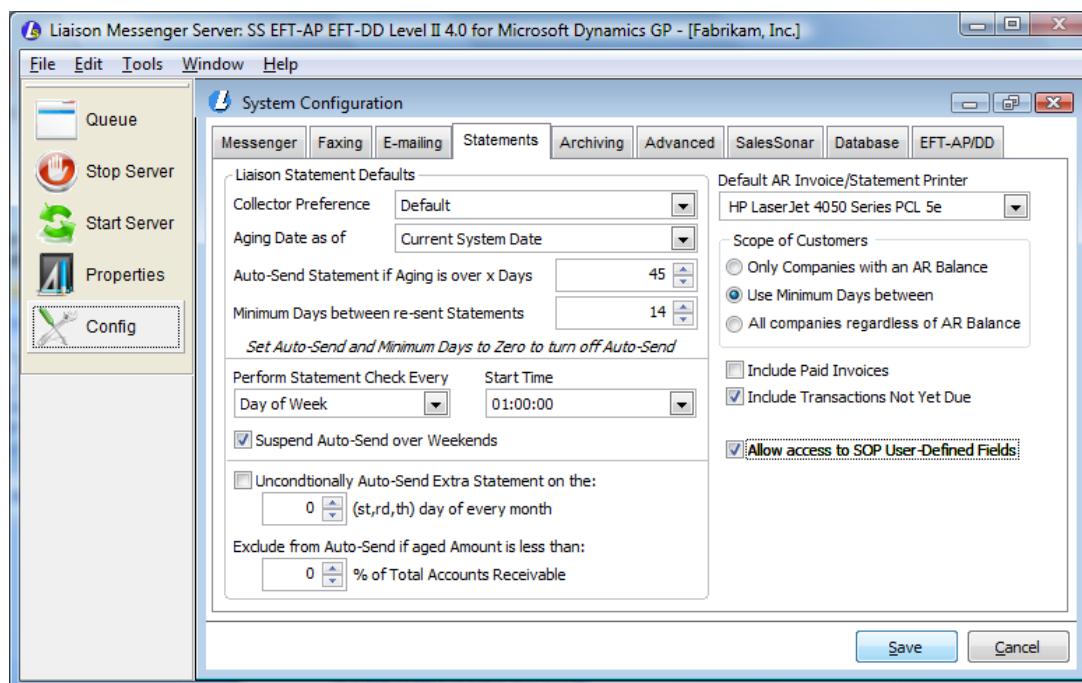
Unless you have a good reason, always start your expressions with the COMPID field. This field identifies the company data set you're printing from. In the above example, we are creating a sort AND grouping that will generate a "summary invoice". Regardless of the Invoice numbers, we want the line items grouped by customer key then item key.

If you are not creating summary style documents, you will want to create sorts that have the respective document number field AS THE 2ND field like: Lmdoel.COMPID+Lmdoel.ORDNO+Lmdoel.LINESEQ.

Under the Help menu, you will find the PDF versions of all the Data Fields and the correct Syntax for referencing the data from your specific Accounting System.

5- AUTOMATED AR STATEMENTS (AKA LIAISON COLLECTOR)

ENABLING LIAISON COLLECTOR



From the File pull down menu, select System Configuration.

STARTING COLLECTOR

To Start Collector set the Auto-Send Statement and Minimum days between Statements to a value greater than 0 and select the Save button.

Based upon the

Collector Preference, Collector will print, fax, or e-mail a Statement of Accounts to the recipient if their outstanding balance(s) go over the Auto-Send number of Days. Specify the Aging Date as of Current Date or the Previous End-of-Month.

EXCLUDING CUSTOMERS

To prevent Collector from sending a Statement to customers should the delinquent amount be deemed insignificant, you can specify a percentage of the Total AR that must be exceeded before a statement is auto-sent.

Customers can also have individual settings. These customer settings are maintained in Properties under the Customers tab and then by selecting the Update button.

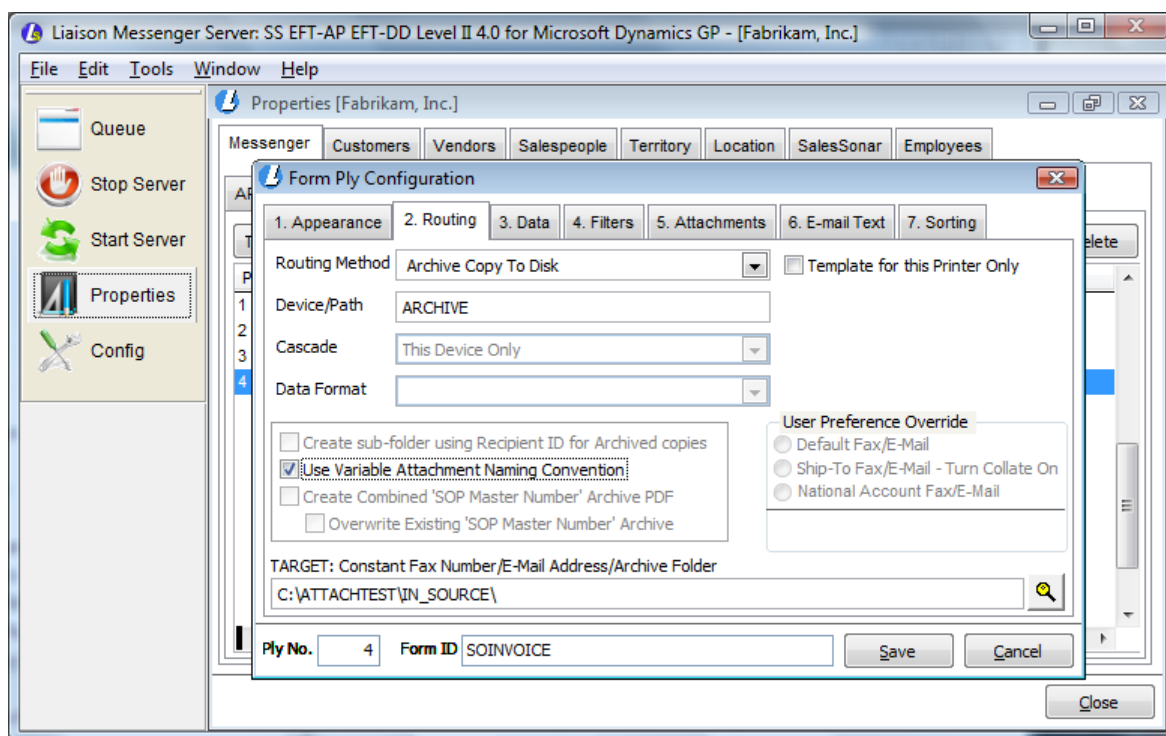
ESTABLISH THE COLLECTOR STATEMENT ROUTING RULES

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

CONFIGURE AUTO-INVOICE ATTACHMENT FEATURE

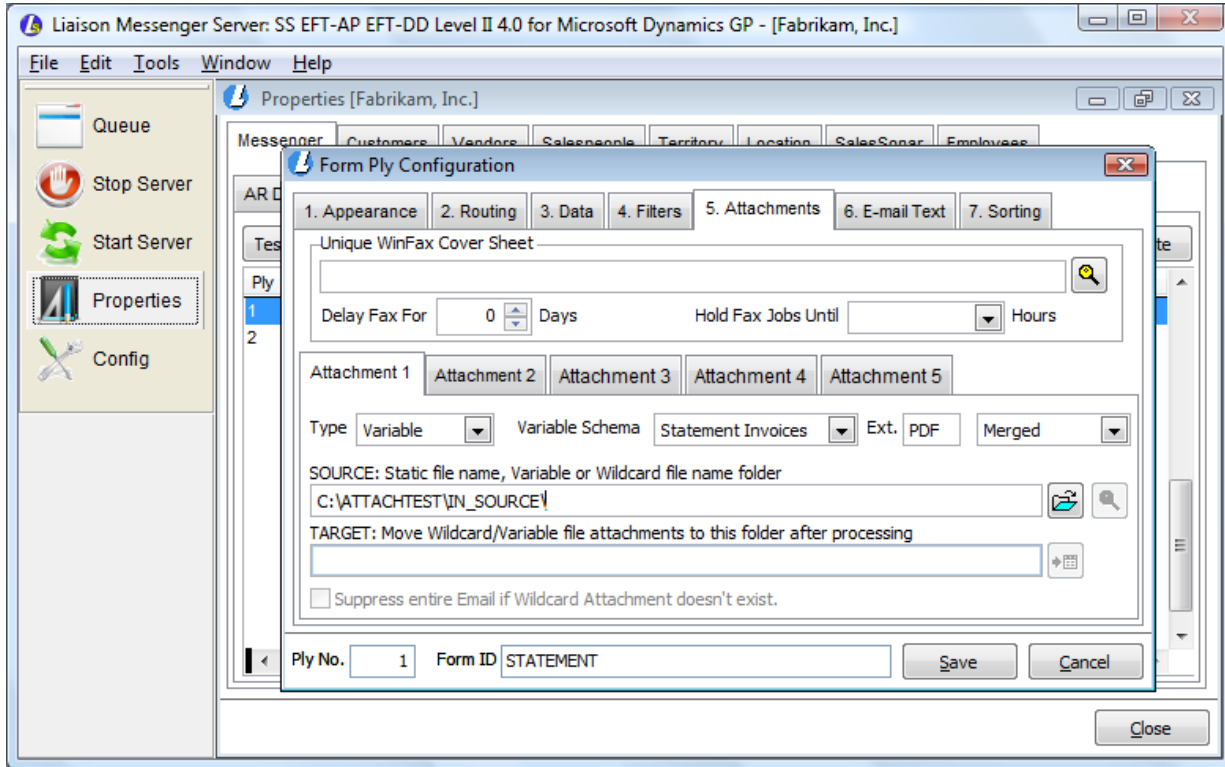
On the Messenger Server, go into the Properties windows and create an Archive ply for Invoices and SOP Invoices.

1. An Invoice ply must first be set to 'Archive Copy to Disk'
2. Check 'Force Variable Attachment Naming Convention'
3. Create and specify a location for these newly archived Invoices



After you've created an archiving ply for the AR and SOP invoices, you will need to establish an emailing ply for the Statements that will attach and/or append these archived invoices.

So from within Properties you should select the Statements tab and select the Customer Ply.



Attachments tab of Statement archive copy

1. Type = Variable
2. Variable Schema = Statement Invoices
3. Ext. = PDF
4. 'Merged' selected from drop list.
5. SOURCE: select location of archive folder that contains the invoice PDF files to attach
6. TARGET: contains path where invoice PDF files will be moved after being attached to statement. This is used so the invoice will only be attached once.

IF NO TARGET PATH IS SPECIFIED THE INVOICE PDF FILES WILL BE ATTACHED WITH THE NEXT STATEMENT PROCESSING IF THE INVOICE NUMBER STILL APPEARS ON THE STATEMENT.



6 – MESSENGER EFT-AP/DD* (MICROSOFT DYNAMICS GP ONLY)

Messenger System Configuration (*Additional Purchase Required)

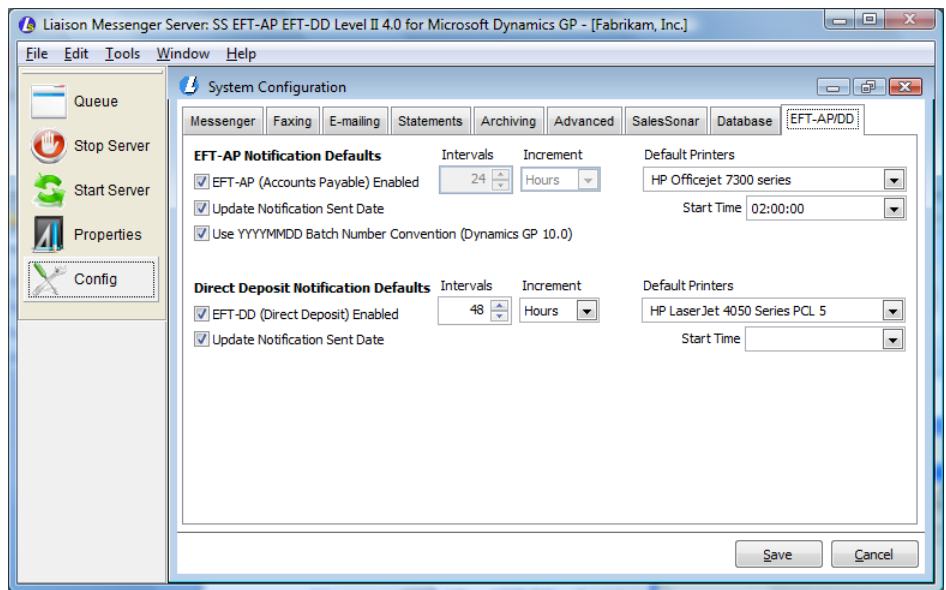
If you've purchased the EFT-AP or EFT-DD module, it must be enabled in the System Configuration screen.

ENABLING EFT-AP (ACCOUNTS PAYABLE)

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

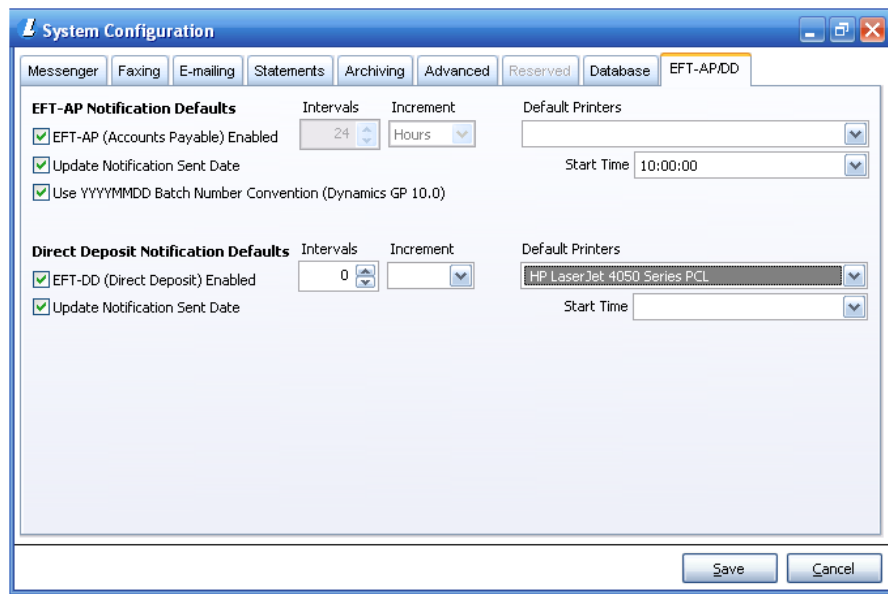
The Vendor's preference must be specified in Recipients Preferences in order for them to receive the EFT notice via email or fax. This can be done by selecting this option from the menu in Messenger Client, Messenger Server, or under the Messenger Properties Vendor tab.

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.



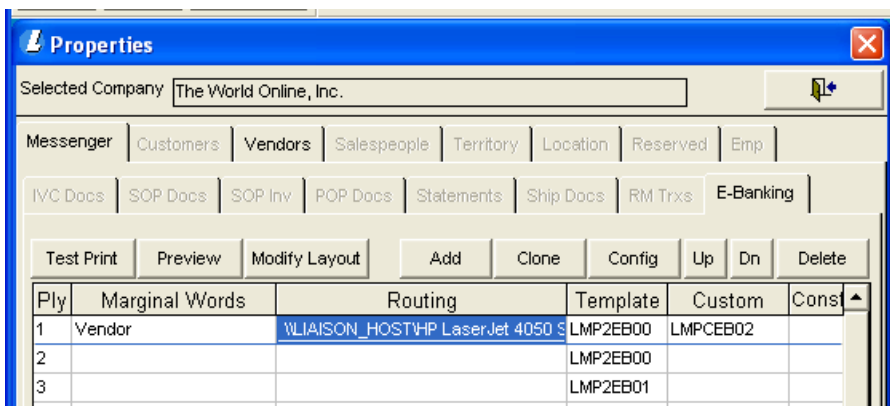
The Default Printer is used as a backup in case one of the printers selected in Properties is unavailable.

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.

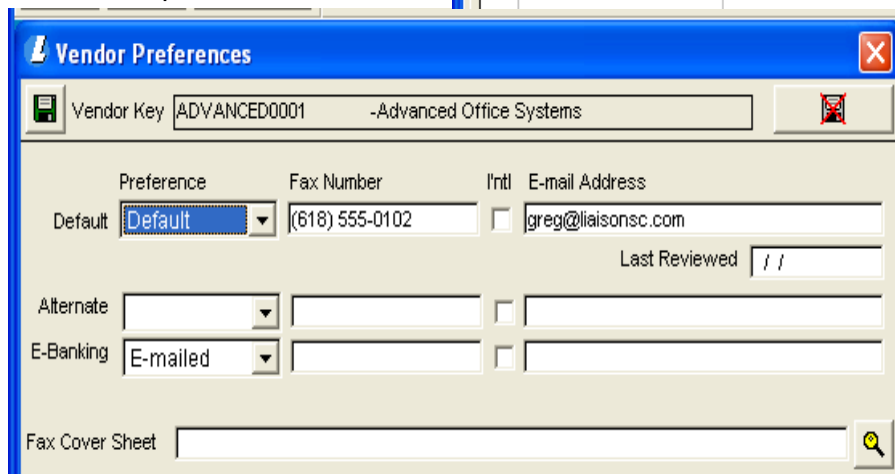
The Ply Configuration and Vendor preferences use the same rules as the other form types. Refer to the chapter that covers Properties for further



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.

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 screenshot shows the 'Internet Information' window for employee Angela Barbariol (Employee ID: BARB0001). It displays contact information including email (Angelab@liaisonsc.com), home page, FTP site, and image. It also includes fields for Login, Password (password), and User Defined 1 and 2. The Address ID is set to PRIMARY with the address 456 Cedar Ave.

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 'Employee Address Maintenance' window for employee Angela Barbariol (Employee ID: BARB0001). It displays address information including Address ID (PRIMARY), Address (456 Cedar Ave), City (Fort Wayne), State (IN), ZIP Code (46001), and Country (USA). It also includes phone and fax numbers.

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.

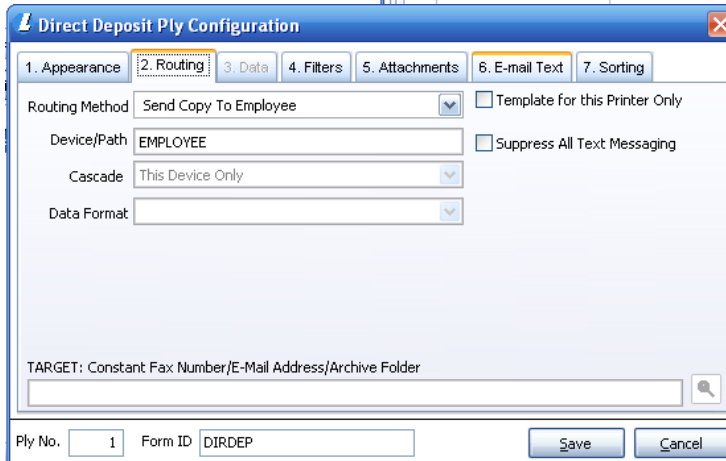
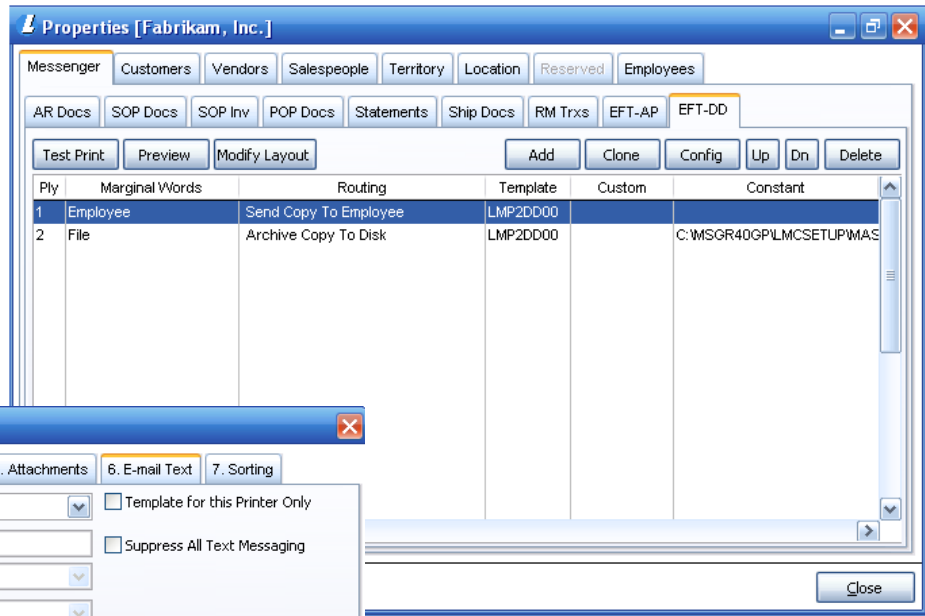
The screenshot shows the 'Employee Preferences [BARB0001-Angela Barbariol]' window. The 'EFT-DD' tab is selected. It displays a list of preferences for Direct Deposit, with 'E-mailed' selected. A message states 'The Default Printer is not available for EFT-DD Documents'. The window also shows fields for Preference, Fax Number, Intl, and E-mail Address / Default Printer.

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

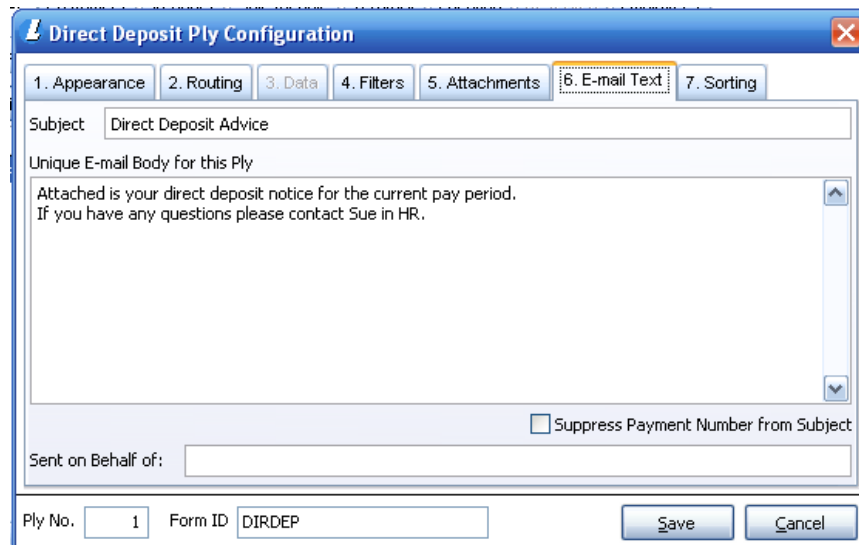


'Suppress' that employee's notice will not be sent. A blank employee preference will be treated as Printed and route to the Default printer specified on the EFT-AP/DD tab of System Configuration.

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

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

Routing Method: Archive Copy To Disk

Device/Path: ARCHIVE

Cascade: This Device Only

Data Format:

TARGET: Constant Fax Number/E-Mail Address/Archive Folder
C:\MSGR40GP\LMCSETUP\MASTER\

Ply No. 2 Form ID DIRDEP

Save Cancel

Report Designer - Imp2dd00.trx - Liaison Messenger Server: EFT-AP EFT-DD Level 1.4.0 for Microsoft Dynamics GP - [Fabrikam, Inc.]

Queue Stop Server Start Server Properties Config

Direct Deposit Earnings Statement

cheknmbr

Pay Date Start Period End Period
PAYDATE STARTPER ENDPER

Earnings Taxes

Page Header
Group Header 1: RECNO("LMDDDT")

Code	Rate	Hours	Amount	Code	Amount	Year To Date
ERNCO1	ERNRATE01	ERNHOUR0	ERNAMNT01	FICA	FICAMVPR	TAXFICMYTD
ERNCO2	ERNRATE02	ERNHOUR0	ERNAMNT02	Med	ECASWPR	TAXFICSYTD
ERNCO3	ERNRATE03	ERNHOUR0	ERNAMNT03	SS	EDWDGPRN	TAXFEDSYTD
ERNCO4	ERNRATE04	ERNHOUR0	ERNAMNT04	Federal		
ERNCO5	ERNRATE05	ERNHOUR0	ERNAMNT05	State		
ERNCO6	ERNRATE06	ERNHOUR0	ERNAMNT06	TAXSTC4	TAXSTAMT01	TAXSTYTD01
ERNCO7	ERNRATE07	ERNHOUR0	ERNAMNT07	TAXSTC4	TAXSTAMT02	TAXSTYTD02
ERNCO8	ERNRATE08	ERNHOUR0	ERNAMNT08	TAXSTC4	TAXSTAMT03	TAXSTYTD03
ERNCO9	ERNRATE09	ERNHOUR0	ERNAMNT09	Local		
ERNCO10	ERNRATE10	ERNHOUR0	ERNAMNT10	TAXLOC	TAXLOAMT01	TAXLOYTD01
ERNCO11	ERNRATE11	ERNHOUR0	ERNAMNT11	TAXLOC	TAXLOAMT02	TAXLOYTD02
ERNCO12	ERNRATE12	ERNHOUR0	ERNAMNT12	TAXLOC	TAXLOAMT03	TAXLOYTD03
Totals				Total	TOTLTAXES	

Payroll Deductions Payroll Benefits

Code	Amount	Year To Date	Code	Amount	Year To Date
DEDCC01	DEDAMNT01	DEDYTD01	BENCO5	BENAMNT01	BENYTD01
DEDCC02	DEDAMNT02	DEDYTD02	BENCO5	BENAMNT02	BENYTD02
DEDCC03	DEDAMNT03	DEDYTD03	BENCO5	BENAMNT03	BENYTD03
DEDCC04	DEDAMNT04	DEDYTD04	BENCO5	BENAMNT04	BENYTD04
DEDCC05	DEDAMNT05	DEDYTD05	BENCO5	BENAMNT05	BENYTD05
DEDCC06	DEDAMNT06	DEDYTD06	BENCO5	BENAMNT06	BENYTD06

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.

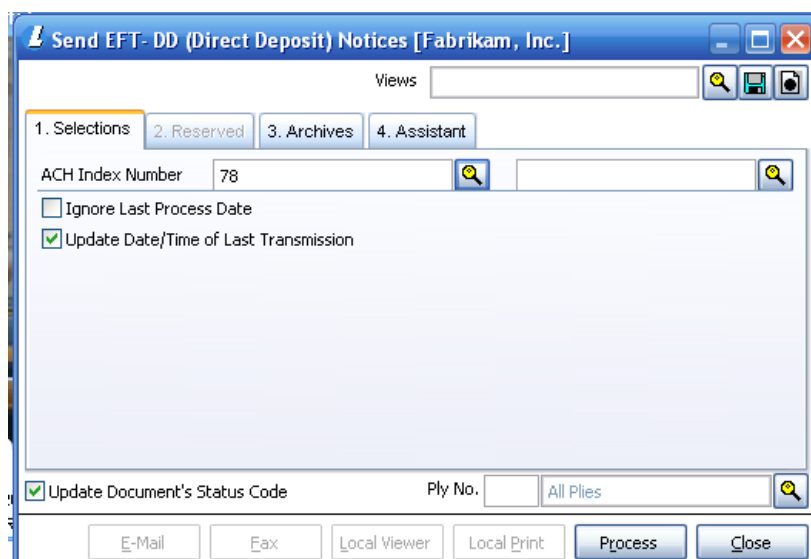
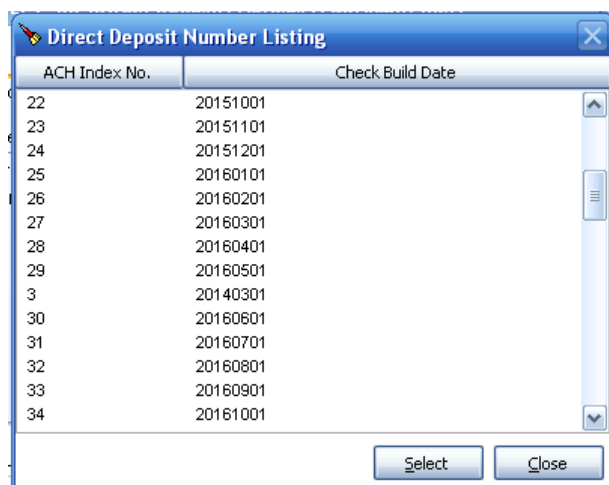
AR Docs SOP Docs SOP Inv POP Docs Statements Ship Docs RM Trxs EFT-AP EFT-DD

Test Print Preview Modify Layout Add Clone Config Up Dn Delete

Ply	Marginal VWords	Routing	Template	Custom	Constant
1	Employee	Send Copy To Employee	LMP2DD00		
2	File	Archive Copy To Disk	LMP2DD00		C:\MSGR40GP\LMCSETUP\MAS

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.



7 - LIAISON QUEUE REQUESTER

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 Server without source code.

By simply calling the LiamQue.exe executable and passing additional arguments (or parameters) you can control Messenger Server from other applications or directly from within a screen of your Accounting System. Perhaps you would like to add a Quick Print, Fax, or E-mail command button.

Here is the full syntax, you do not need to include "" to surround text strings. Argument D1 and D2 are optional. These are document over-ride parameters you could pass.

- Parameter S1 is a constant string. It relates to the Company ID assigned to that Company Dataset.
- Parameter S2 is a constant string. Do not end the path with a \, Messenger will automatically add it.
- Parameter P1 is a constant (SOP,POP,IVC,SD, or ST) for the respective module.
- Parameter P2 and P3 are variable data types relative to the document.

BASIC SYNTAX:

```
<d>:\Messenger\LiamQue.Exe S1 S2 S3 P1 P2 P3 D1 D2
```

- *S1=Company ID
- *S2=Path to Messenger Queue
- *P1=MESSENGER FORM TYPE (SOP,POP,IVC,SD,ST)
- *P2=<GPDOC_TYPE> Do NOT Include the <brackets>, use the proper database reference from Dexterity
- *P3=<GPDOC_NUMBER> Do NOT Include the <brackets>, use the proper database reference from Dexterity
- *D1=DOCUMENT ROUTING OVERRIDE
(1=ROUTE,2=PRINT,3=FAX,4=EMAIL,5=ASCII,6=EXPORT)
- *D2=ROUTING (UNC),FAX NUMBER (999) 999-9999, EMAIL ADDRESS, FILE NAME FOR D1>=3

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



8 – 3RD PARTY ADD-ON PRODUCTS

TECHNICAL SUPPORT

As much as we would like, Liaison Software Corporation cannot provide technical support on Acrobat, Outlook, and WinFax PRO. We can answer some basic questions as it relates to Messenger; however, the actual publisher of their respective product(s) always provides the best support and should be used.

As a software publisher, Liaison Software Corporation urges you to comply with all software-licensing provisions of the products we recommend and or sell. Unauthorized use of software is a crime.

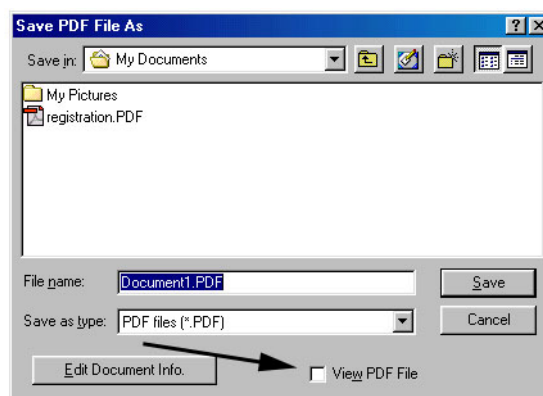
ADOBE ACROBAT

Even though Liaison Messenger now includes a licensed PDF Writer from Amyuni, Liaison Messenger still works with Adobe Acrobat 4.x and 5.x. Messenger will not work with Acrobat Distiller. It must be the PDF writer. One area you need to check (or uncheck really) is the Save PDF File As dialog box.

When using the archiving or e-mailing feature in Messenger with Adobe Acrobat you must ensure that View PDF File option is turned off (unchecked) in Acrobat's Save PDF File As dialog box. To turn this option off, you must follow these instructions:

Login to the PAS as Administrator. No other login name will make this setting.

1. Open up Microsoft Word or WordPad
2. Select File, Page Setup, then Printer...
3. Choose the Acrobat PDF writer as the printer destination
4. Print the document
5. Uncheck the View PDF File



MICROSOFT OUTLOOK/OUTLOOK EXPRESS

For e-mailing, this mail client seems to be the most popular. Even though Messenger will work with most any MAPI compliant e-mail program, Microsoft Outlook and Microsoft Outlook Express have been most successful. When installing, only setup one User Profile.

Multiple user profiles will require you to enter the E-mail address, Account Name, and Password in System Configuration under the E-mail tab.

If only one user profile is created, Messenger will utilize these settings with no prompting. If you must have multiple profiles on this PC, please keep in mind that Messenger and Outlook are case sensitive in their settings.

Also ensure that the Outlook/Express client has access to the Internet and no user prompts requiring intervention appears. These types of interruptions can cause Messenger errors and disrupt the flow of the business forms.

SYMANTEC WINFAX PRO

If you are planning on faxing forms with Symantec's WinFax PRO, only one copy of WinFax PRO is needed and must be loaded on the PC that is acting as the Messenger Server.

In System Configuration under the Faxing tab make sure that the WinFax PRO option is selected for Fax Server/Application .

IMPORTANT – Please note that Symantec will only support WinFax PRO on Windows NT/2000 Workstation. Symantec will NOT provide support WinFax PRO on a Windows NT/2000 Server.

We do not know why...

The only post installation configuration we recommend is setting the number of Retries on a failed fax to between 5 and 10. The set the minimum seconds between retries to about 500. This helps WinFax in making sure that all faxes, which failed due to busy numbers, can be successfully resent.

MICROSOFT FAX TRANSPORT

If you are planning on faxing forms with Microsoft Fax Transport, you'll also need to install one copy of Microsoft Outlook. Microsoft Fax Transport does not work with Outlook Express. Please refer to the documentation for Microsoft Fax Transport and Outlook for the most current installation requirements and procedures.

In System Configuration under the Faxing tab make sure that the Microsoft Fax Transport option is selected.

LIAISON CRM

Liaison CRM was developed by Liaison Software Corporation and is fully integrated with Liaison Messenger for PFW. You can instruct Messenger to update the Liaison CRM Notebook of each Customer when a Sales Order, Invoice, and Statement are generated. To enable this feature follow the instructions below.

From the File menu choose Company Configuration. Select the Liaison CRM Location tab. Enable and enter the path of where the Liaison CMDCFG.DBF file in the Liaison Folder.

Then choose the Company Dataset in Liaison that is linked to the PFW or BatchMasterPFW Company Dataset you are configuring.

When done, choose Save and proceed to System Configuration from the File menu.

Select the Advanced tab and then Liaison CRM interface. Choose the desired forms to update the notes file. When done choose Save.



9 - CUSTOMIZING FORMS

PLACE ADDITIONAL ACCOUNTING SYSTEM DATA ONTO A FORM

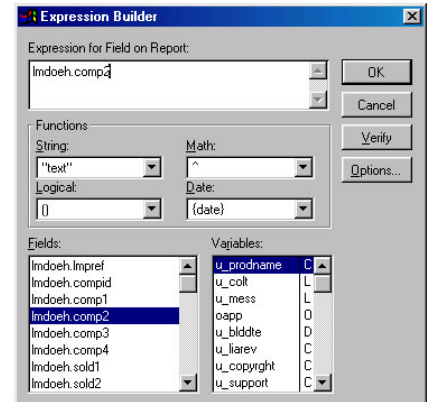
Liaison Messenger lets you access additional fields and tables from your Accounting System and place the desired field(s) onto a form. To access these tables open the applicable databases and place them into the data environment screen. The table listing later in this chapter illustrates the databases that can be opened for each form.

From the Properties screen click the modify layout button

From the reports controls tool bar choose the field button. When the cursor is brought on to the form the cursor will change into cross marks. Left click and draw a box. This will bring you into the report expression.

Choose the button to the right of expression field. You are now in the expression builder. In the bottom left corner will be a fields list which contains all the fields that can now be accessed and brought on to the form you are modifying. Refer to the database dictionary for definitions of each field.

Double click on a field and click OK



MESSENGER PRINT TABLE LISTING

AR INVOICES/CREDIT MEMOS

LMDARH.DBF	AR Invoice Header Structure Master
LMDARL.DBF	AR Invoice Detail Structure Master

SALES ORDERS, QUOTES, SHIPPERS, AND INVOICES

LMDOEH.DBF	SO Order & Invoice Header Structure Master
LMDOEL.DBF	SO Order & Invoice Detail Structure Master

PURCHASE ORDERS

LMDPOH.DBF	Purchase Order Header Structure Master
LMDPOL.DBF	Purchase Order Detail Structure Master

FORM DESIGNER

Use the Form Designer to create and modify custom Form Templates. When the Form Designer window is active, Messenger displays the Report menu and the Report Controls toolbar.

To modify an existing ply's layout, choose Modify Layout in the Forms Configuration Wizard. To create a new custom form layout, from the Ply Configuration window choose Custom Template and then the Create Custom Ply Template.

Below is a brief description of the Form Designer.

BANDS

By default, the Form Designer displays three bands; Page Header, Detail, and Page Footer. A separator bar is located at the bottom of each band. The name of the band type appears on the bar next to a blue arrow, which indicates that the band is above, not below, the bar.

You can add the following bands to your Form.

Band	Printed	Typical Contents
Column Header	Once per column	Column title
Column Footer	Once per column	Summary, totals
Group Header	Once per group	Preface to following data
Group Footer	Once per group	Calculated values for group data
Title	Once per report	Title Date or page number Company logo Box around the title
Summary	Once per report	Grand totals Text such as Grand Totals

RULER

The Form Designer has a vertical and horizontal ruler you use to more precisely position objects in the bands. Use the ruler in conjunction with the View menu's Show Position command to help you position objects.

The scale for the ruler is determined by your system measurement settings. You can change from the system default scale (inches or centimeters) to pixels from within Messenger. If you want to change to the system default, change the measurement setting for your operating system.

TO CHANGE THE RULER SCALE TO PIXELS

From the Format menu, choose Set Grid Scale. The Set Grid Scale dialog box is displayed.

In the Set Grid Scale dialog box, select Pixels and choose OK.

The ruler scale is set to pixels, and the position indicator in the status bar (if Show Position is checked on the View menu) also displays positions in pixels.

PLANNING DATA PLACEMENT

Once you have a report layout, you can modify the placement of the data on the report page. Using the bands in the Report Designer, you can control where data is printed on the page. Your report layout can have several bands. The figure below shows some of the bands a report can include and typical contents for each band. Notice that the bar below each band identifies the band.

REPORT BANDS IN THE REPORT DESIGNER

A report can also have multiple group bands or bands for a column header and footer. You can add these bands using the procedures in Defining the Report Page and Grouping Data on Your Layout later in this chapter. You can use the table below to determine which bands you want to use.

Use this band	To print	Use this command
Title	Once per report	Choose Title/Summary from the Report menu.
Page header	Once per page	Available by default.
Column header	Once per column	Choose Page Setup from the File menu and set Column Number greater than 1.
Group header	Once per group	Choose Data Grouping from the Report menu.
Detail band	Once per record	Available by default.
Group	Once per	Choose Data Grouping from the Report menu.

footer	group	
Column footer	Once per column	Choose Page Setup from the File menu and set Column Number greater than 1.
Page footer	Once per page	Available by default.
Summary	Once per report	Choose Title/Summary from the Report menu.

You can place any of the report controls in any of the bands. You can also add user-defined functions that are processed when the report is run. .

RESIZING BANDS

You can modify the size and characteristics of each band.

To resize a band Drag the band's bar to the appropriate height.

Use the ruler to the left as a guide. The ruler's measurement is specific to the height of the band and does not include the page margins.

Tip You cannot make a band shorter than the height of the controls in the layout. Move the controls within the band first, and then reduce the height.

DATABASE DICTIONARY

To add fields that contain data from the Dynamics databases, please refer to the included Database Dictionary, which are in 3 Adobe Acrobat PDF files found in the S:\MESSENGER\LMCsetup\Doco folder.



10 - UPGRADING LIAISON MESSENGER

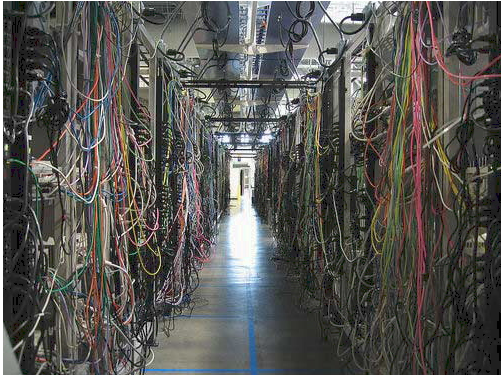
These are the recommend steps you should follow when upgrading Liaison Messenger from version 3.x to 4.x. However, it would also apply to older versions 2.x and earlier; but, the Exe file names would be different. All other steps would be the same.

YOU MAY BE REQUIRED TO REBOOT THE MACHINE AT THE END OF THE INSTALLATION

1. Exit Messenger Clients on the workstations
2. Delete all existing jobs from the Queue in Messenger Server. (File \ Services Monitor–History/Queue) Single click the line and click Delete Print Job. Exit and close down the Liaison Messenger Server application.
3. Go to existing (i.e., S:\MESSENGER) folder where Liaison Messenger is installed on the network and make a copy of all files that begin with the letters LM*.* and place them in a safe folder.
4. Rename LIAMSG30.EXE to LIAMSG30.OLD
5. Rename FLLINTF210.FLL to FLLINTF210.OLD (ignore if this file does not exist)
6. If you will be installing Liaison Messenger 4.0 into a new folder, we recommend following these simple steps (a thru c) before running the setup.exe in Step 7:
 - a. Rename the existing Liaison Messenger folder (i.e., S:\MESSENGER to S:\MESSENGER30)
 - b. Create a new folder using the exact same folder name (i.e., S:\MESSENGER)
 - c. Copy the LM*.* files from the renamed folder into this new folder S:\MESSENGER30 to S:\MESSENGER. This will ensure your previous configuration will be maintained thru the upgrade.
7. Insert the Liaison Messenger 4.0 CD and run SETUP.EXE file. Rest assured, this installation program will not overwrite any settings, preferences, or routings from the existing Messenger version. All existing configurations will remain intact.
8. At the prompt, choose Messenger Server Installation from the Setup Options window.
9. Select the directory where Messenger is installed. This folder should either be:
 - a. The new Messenger folder you may have just created, or
 - b. the existing folder where the original LIAMSG30.EXE was located, then
 - c. click Yes when the prompted.

10. Once the installation has finished, click OK to accept the default program group.
11. During this process, a new version of the Liaison PDF driver will be installed. This version is compatible with 64 bit operating systems. Click OK when the progress screen completes.
12. You may also be prompted to add the MAPI registration information into the Windows registry. You must select Yes.
13. At this point, you may be prompted to allow the system to reboot and you should allow this by selecting OK. Restart the PC; but, do not launch the Messenger Server program, yet.
14. If you have previously made any manual shortcuts, you will want to update the Target fields to reflect Liaison Messenger's new file name. This is done by right-clicking any Liaison Messenger Server shortcuts and choosing Properties. Change the name of the executable in the Target field from LIAMSG30.EXE to:
 - a. LIAMAS40.EXE (for users of PFW, MAS90/200)
 - b. LIAMBS40.EXE (for users of Dynamics GP or Dynamics SL)
 - c. Repeat this for any other shortcuts on the desktop or sub-menus that have been created for Messenger Server. The Messenger Clients do not need to be updated as the file name did not change.
15. Launch Messenger Server. An update procedure will begin. When the update is complete click OK and the Messenger Server will close.
16. Launch Messenger Server again and it should now open to the Server Status window and the stop-and-go icon should be at a green light. This confirms the update was successful.
17. Exit Liaison Messenger Server for now. It is now time to upgrade the Messenger Clients on each workstation.
18. Using the same CD (or the setup.exe file if you copied the Setup.Exe onto the network) launch setup.exe and choose the Liaison Messenger Client option and click OK.
19. Select the network directory where Messenger is installed (i.e., S:\MESSENGER). The actual existing path can be verified by right-clicking the shortcut to Messenger Client and choosing Properties. Click Yes when the prompt appears confirming the directory.
20. Once the installation is finished click OK to accept the default program group.
21. Repeat steps 18 through 20 on the other workstations running Messenger Client until all workstations have been upgraded.
22. Return to the Liaison Messenger Server and start it.

From the File menu, choose System Configuration and immediately click the Save button and If you are asked 'Do you want to start the Messenger services, (Green Light)?' answer Yes.



11 - MOVING THE LIAISON MESSENGER SERVER

STEPS FOR MICROSOFT DYNAMICS GP/SL

These are steps required when wanting to move Liaison Messenger from one machine to a different machine.

These instructions are for moves where the Liaison Messenger files and data will stay in same network folder\directory but the Messenger Server will run from different machine (*see additional steps at bottom for moving to new directory*).

1. Install all 3rd Party Software on new machine (Outlook, Winfax, Adobe Acrobat, etc)
2. Create ODBC Data Sources for the System database (Dynamics) and each company database you wish to run with Messenger. Best to keep the data source names the same as those on the original Messenger Server machine.
3. Delete all entries in the Queue on the original Messenger Server.
4. Close all Messenger Clients and the Messenger Server on the original machine and copy all LM*. * files from the Messenger folder to a backup folder.
5. Install Messenger Server from the CD on the new machine. Point the installation path to the existing Messenger folder.+++
6. Launch Messenger Server from new machine and let the update process run.
7. Click OK when update is complete. Close Messenger Server.***
8. Run the latest update for Messenger on the new machine. (setupdte.exe) Be sure to follow the separate instructions for the update. After the update is complete click OK then reopen Messenger Server.
9. Go to File | System Configuration.
10. Reselect the Default Printers on the Messenger tab.
11. Verify/change the Dynamics Data Source under the Database tab.
12. If using WinFax PRO, choose the Faxing tab and reselect the WinFax driver and the location of WFXCTL32.EXE

13. Choose the E-mailing tab and reselect the Attachment printer driver. (Liaison Messenger PDF or Acrobat PDF Writer)
14. Choose the Archiving tab and reselect the Archiving printer driver. (Liaison Messenger PDF or Acrobat PDF Writer)
15. Click Save then click No if asked to restart the server.
16. Go to File | Select Company Dataset. Click the desired company and choose Company Configuration.
17. Click the SQL Server tab and verify/change the Company Data Source.
18. Click Save then single click the company and click Select.
19. Go to File | Properties.
20. You will need to reselect the printer for each ply and any bitmap locations for the Return Address. Repeat this for each form tab.
21. If installing to a new network folder, the shortcut to Messenger Client on each workstation will need to be changed to the new path.

+++ IF INSTALLING TO A NEW MESSENGER FOLDER POINT THE INSTALLATION TO THE NEW MESSENGER FOLDER.

*** IF MOVING THE NETWORK LOCATION OF THE MESSENGER FILES YOU WILL NEED TO COPY THE LM*.* FILES FROM THE OLD MESSENGER DIRECTORY TO THE NEW ONE OVERWRITING THE EXISTING FILES. THIS WILL BE DONE BETWEEN STEPS 7 AND 8.

STEPS FOR PFW BY SAGE SOFTWARE INC

Follow these steps to move Messenger Server from Platinum root directory to new Messenger folder. (or different Platinum directory)

1. Create Messenger folder in desired location.
2. Install Messenger Server from CD into the new folder.
3. Open Messenger from the new folder- an update procedure will run.
4. After clicking OK if System Configuration opens click Save (diskette icon upper left)
5. Close Messenger – both the new one and the existing one.
6. Make sure everyone is out of Messenger Client.
7. Copy the LM*. * files from the existing Platinum directory to the new Messenger folder.
8. Run the latest update (setupdte.exe) pointing to the new Messenger folder.
9. (Or if installing from latest setup file open Messenger Server and choose Run Update from Tools menu)
10. Open Messenger Server (messenger folder). The update procedure will run and notify you when complete.
11. Click OK – Messenger will close
12. Open Messenger.
13. From the Tools Menu choose Modify Company Data Paths.
14. The lmdcfg table will open.
15. Scroll to the right to locate the column Approot.
16. Change the path for each to your platinum root directory.
17. Click the close “x” to save the changes.
18. Go to File > Select Company Dataset.
19. It will pull up the companies listed under PFW.
20. You can then highlight a Company; click Company Config and Enable For Messenger if not already checked.
21. Click the Email/PSQL tab then click the yellow lookup button on the right to select the correct company data directory.
22. Click Save.

23. Highlight your company key and click Select.
24. Click No when it asks you to restart the Server.
25. Next go to File Properties to verify your ply settings and printer mappings.
26. You can click the Preview button to test the connection to PFW.
27. If you are also running Liaison CRM you will need to still keep all the Messenger files in the Platinum root directory. This is needed to do recreates through CRM.
28. You will need to change the shortcut to Messenger Server.
29. You will need to change the target for Messenger Client on the workstations to the new Messenger folder.



running.

12 – TROUBLESHOOTING

ERROR CODES

BTRIEVE STATUS/ERROR 88 – INCOMPATIBLE MODE ERROR

Resolution - This happens when the Btrieve / Pervasive.SQL client engines are set to Single Engine. You must configure Btrieve/Pervasive.SQL engines a Multi-Engine. This includes the NT machine acting as the DAS and/or where Messenger Server is

MESSENGER ERROR 15 – NOT A DATABASE ERROR

This happens from turning off the PC/Server without exiting Messenger Server. Most likely the user had a power outage. Unfortunately, they have to restore the LMD*. * files from their last backup into their Dynamics root directory.

MESSENGER ERROR 36 – COMMAND CONTAINS UNRECOGNIZED PHRASE/KEY

This happens when Archive to Disk is used and the Constant Folder/Directory Path contains embedded spaces (i.e., I:\DYNAMICS\TWO_INC\SALES ORDERS\). When creating folders for archiving, do NOT use folder names with embedded spaces.

MESSENGER ERROR 107 - OPERATOR / OPERAND MISMATCH

(*Applies to Liaison Messenger 1.5D and before.)

This error occurs when the last Messenger update is not run after the Messenger client was installed on a new workstation(s).

WHEN INSTALLING AN UPDATE

- Make sure everyone is out of Messenger server and client
- Run the setup program and install it on the Dynamics directory on the network
- When finished, start Messenger server and let Messenger server complete the update process (from 15 seconds to 4 minutes)
- When complete you will be required to restart Messenger server

* If you are installing more messenger clients rerun the update procedure after a new client is installed.

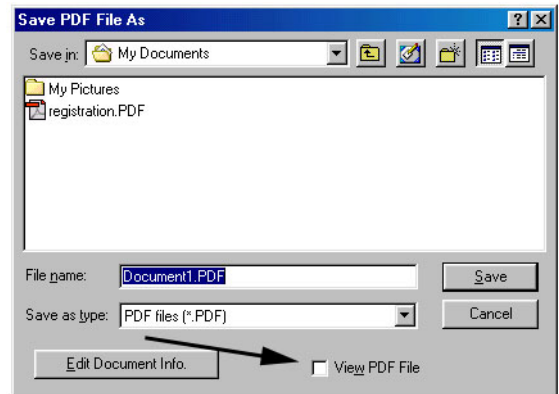
* The installation of Messenger client on a new workstation(s) will not be complete until the last update is run.

MESSANGER ERROR 1705 – FILE ACCESS DENIED

This can happen when using the archive e-mailing feature in Messenger and when the View PDF File option is turned on (checked) in Acrobat's save file dialog box.

Resolution:

1. Login to the DAS as Administrator. No other login name will work
2. Open up Microsoft Word or WordPad
3. Select File, Page Setup, then Printer...
4. Choose the Acrobat PDF writer as the printer destination
5. Print the document
6. Uncheck the View PDF File



MESSANGER ERROR 1957 – ERROR ACCESSING PRINTER SPOOLER

Resolution – This happens when the form/ply's Printer Mapping no longer exists. Go into Messenger Server and reselect the desired printers. This typically happens when Messenger Server is started and configured from a PC is not going to be the PC running the Messenger Server program in production. Remember, the printers may physically be the same but the way Window 98/NT maps them may vary machine to machine. Always configure Messenger Server from the PC that will be running Messenger Server.

MESSANGER/COLLECTOR (EXCLAMATION POINT MESSAGE BOX W/ OK HELP BUTTONS) - INVALID PATH OR FILE NAME.

They have specified a bitmap to use as their Logo and someone deleted or moved the <logo>.BMP file. Go into the respective Form and Ply and relocate the BMP file.

TIPS FOR THE INSTALLER

BTRIEVE/PERVASIVESQL

Whichever PC is going to be the Messenger Server, make sure the PC has btrieve/Pervasive client engines installed and are consolidated in the directory recommended by Pervasive.

Also make sure that the client engines are configured for Multi-Engine and that sufficient file handles and record locks have been specified.

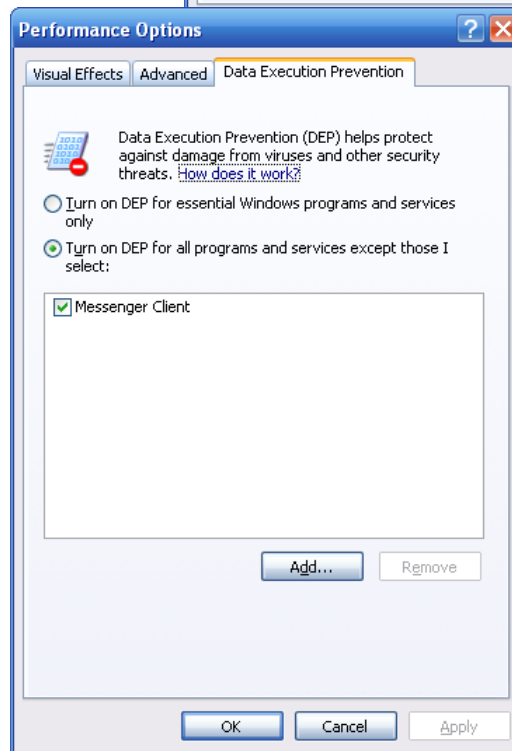
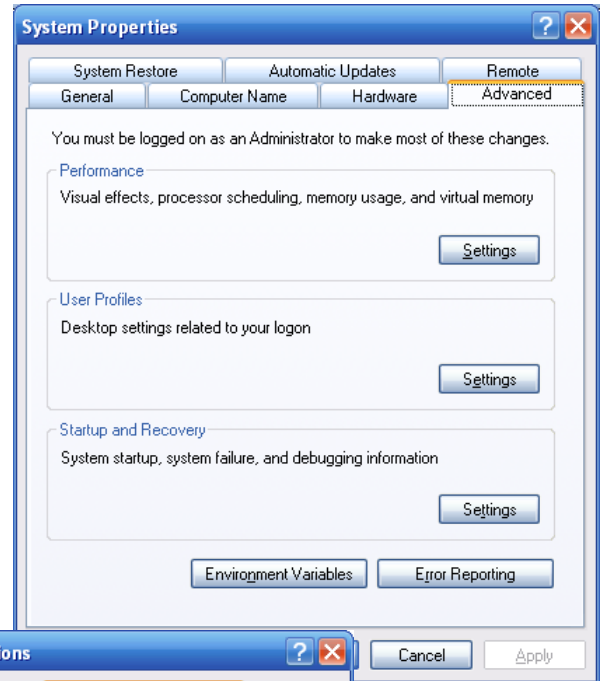
ESTABLISHING PRINTER MAPPINGS

Please be aware that you cannot configure Messenger Server from any workstation other than on the PC/server that Messenger Server will be running.

UNABLE TO LAUNCH LIAISON MESSENGER CLIENT

Sometimes Microsoft's Data Execution Prevention feature prevent Messenger Client from starting when the User chooses the icon/shortcut from their desktop. To correct:

1. Right click My Computer | Properties
Choose Advanced tab
Click Settings under Performance section
2. Choose the Data Execution Prevention tab
Select the 'Turn on DEP for all programs and services except those I select' button
3. Click the Add button and select the LIAMCLI.EXE from the Messenger folder
Click Apply.
4. Windows will need to be restarted in the changes to tab effect.



order for



13 – WHAT’S NEW IN LIAISON MESSENGER

LIAISON MESSENGER® 4.0 ENHANCEMENTS

Listed below are some major enhancements for Liaison Messenger 4.0. This major version upgrade of Liaison Messenger was made available in the 1st Quarter of 2008 for users of Sage PFW and MAS90/200 and has had periodic maintenance updates to include Sage PFW 5.7 in the 4th Quarter of 2008.

The Liaison Messenger 4.0 release for Microsoft Dynamics GP and SL is scheduled for release during the 1st Quarter of 2009.

BROADER APPLICATION INTEGRATION

Messenger is now integrated into the following products through their most current respective versions.

- Sage MAS*90 v4.3
- Sage MAS*200 v4.3
- Microsoft Dynamics v10.0
- Microsoft Dynamics GP EFT-AP or EFT-DD (EFT) v10.0
- MBS Solomon/Dynamics SL v7.0
- Microsoft Dynamics GP/Dynamics GP v10.0
- Sage PFW v5.6
- Sage PFW v5.7

BROADER OPERATING SYSTEM AND SERVER INTEGRATION

- ✓ Windows Vista
- ✓ Windows Server 2008
- ✓ 64 bit Windows Platform/Operating Systems; Client & Server
- ✓ SQL Server 2005 Certification

IMPROVED USER INTERFACES

Redesigned Messenger Client Interfaces

Updated Messenger Server Interface

OPTIMIZED SQL VIEWS

Greatly improved processing speed of unattended processing for Dynamics GP & SL SQL based installations.

TEXT MESSAGING/SMS CAPABILITIES

Internal recipients can now receive SMS/text messages and alerts to their supported cellular/mobile devices when select documents and plies are created or have advanced through the document's workflow. Internal error notifications can now be sent to IT personnel via cellular/mobile devices immediately notifying them of critical changes or problems within their Liaison Messenger hardware and or software environment.

BROADER FAX SERVER INTEGRATION

Liaison Messenger included direct support for more internet based fax service companies and integrated Fax Board solutions.

BROADER E-MAIL INTEGRATION

- Eudora
- Microsoft Mail
- Microsoft Outlook/Office 2007
- Novell GroupWise

MISCELLANEOUS FEATURES

Liaison Messenger PDF Driver

- Font Embedding
- 128 Encryption
- 64-bit compatibility
- LPT2, LPT3, and custom port and assignments for Terminal Service/Cytrix

Internal/External Dialing Configurations for faxing state dialing schemas

Microsoft Dynamics GP - Unattended Processing for Posted (historical) SOP documents

LIAISON MESSENGER® 3.0 ENHANCEMENTS

BROADER INTEGRATION

Messenger is now integrated into the following products through their most current respective versions.

- Sage MAS*90 – 1st Quarter 2006
- Sage MAS*200 – 1st Quarter 2006

- Microsoft Dynamics SBF – 3rd Quarter 2005
- Microsoft Dynamics GP EFT-AP or EFT-DD (EFT) – 3rd Quarter 2005
- MBS Solomon/Dynamics SL – 1st Quarter 2004
- Microsoft Dynamics GP/Dynamics GP – 3rd Quarter 2002
- Sage BatchMaster/pfw/ERP*100 – 3rd Quarter 2000
- Sage PFW/ERP*100 – 2nd Quarter 2000

MULTIPLE DOCUMENT DISTRIBUTION DESTINATIONS

Messenger now supports multiple recipients per document. Process documents simultaneously to the National Account, Bill-To, and Ship-To address. Perfect for large customers who require centralized payment process to Corporate HQ, Advanced Ship Notifications to Ship-To, and Order Fulfillment Notices to purchasing facilities (Bill-To).

NEW - MICROSOFT DYNAMICS GP, EFT-AP MODULE & DIRECT DEPOSIT MODULE

For users of Microsoft Dynamics GP, Liaison Software Corp released Messenger EFT for Electronic Distribution of Vendor Payment Notice. Automatically distribute electronic voucher statements upon Electronic Fund Transfers using Microsoft Dynamics GP EFT-AP module.

ENHANCED SEARCHING CAPABILITIES

Locating Customer/Vendor Preferences is much easier now. Search by name; fax number; or e-mail address – no more scrolling through your complete list of Customers or Vendors. Also, searching for Archived documents in the Archive Manager has improved.

USER-DEFINED INDEXED AND SORTS

Create unique indices and sorts on a ply-by-ply basis. Great for creating Summary Invoices, Inter-Company Statements, Bills-of-Ladings, Shipping Docs, etc...

USER-DEFINED FORM SIZES

Create unique or odd sized form sheet sizes using the Windows Printer Drivers and bind them to a specific Form Template. Perfect for creating or implementing unique, landscaped dot-matrix forms.

OPTIMIZED SQL VIEWS

Greatly improved processing speed of unattended processing for Dynamics GP & SL SQL based installations.

BROADER FAX SERVER INTEGRATION

Liaison Messenger included direct support for Microsoft Fax Transport, RightFax, GFI Fax, and ZetaFax as well many internet based fax service companies.

REAL-TIME ERROR NOTIFICATION PROCESS

Automatically email internal individuals and/or Liaison Software Corp's Technical Support department should an unplanned error momentarily interrupts Messenger processing abilities.

REAL-TIME PRINTER ERROR HANDLING

Automatically re-route a print job to a backup printer in the event the intended printer disconnect due to networking or hardware issues.

FULL-ROUTING OPTIONS ON RECREATES

Rerun an entire process of Posted Documents to include all plies.

ALTERNATE RECIPIENT PREFERENCES

Used for exception routing. This feature can also be used to distribute Sales Literature or Promotion blasts in conjunction with Messenger Client Statement processing.

AUTOMATED PROCESSING FOR MULTIPLE TYPES OF ORDERS

Before Messenger 3.0 Unattended processing was only available for one or all stages of an order/invoice, i.e. New Orders OR Back Orders OR Quotes, etc. Version 3.0 allows you to configure multiple status types of orders for unattended processing.

ADD VARIABLE FILE ATTACHMENTS TO E-MAILS

Now you can add variable file attachments to an order based specific to Customer Key, Vendor Key, or Document Number.

ADD STATIC FILE ATTACHMENTS TO E-MAILS

Now you can add static file attachments to an order, i.e.

Add Terms and conditions to a Purchase or Sales Order

Attach a Credit Application for those customers set up as COD, etc.

Send out promotional literature with every Invoice or Sales Order

CREATE MULTIPLE E-MAIL DESTINATIONS PER RECIPIENT

E-mail addresses can be entered delimited by semi-colons to allow multiple recipients per form ply.

SCHEDULE STATEMENTS TO PRINT AUTOMATICALLY ON A SPECIFIC DAY OF THE WEEK

Added the ability to process statements on a given Day of the Week and a specific time. Can be used in conjunction with the real-time processing features found in Liaison Collector.

ALLOW ARCHIVED ORDERS TO BE ARCHIVED AS INDIVIDUAL PDFS RATHER THAN GROUPED.

Makes it easier to retrieve archived documents – Each archived form is assigned its own PDF instead of being grouped by batch.

CREATE INDIVIDUAL FAX COVERSHEETS

Now you can create fax coversheets specific to your customer or vendor needs. You can also create a coversheet by ply, for example, create an order acknowledgement ply that.

OUTPUT FORMS TO DISK

More and more applications wish to integrate and communicate via disk files Spreadsheets, dBase files, SDF files, comma delimited, space delimited. Here you can specify a particular file type into a specific directory for a third party application to pick up and read. i.e. credit card processing and fulfillment applications.

CREATE PLIES TO PRODUCE A VARIETY OF OUTPUT FILE FORMATS

ENHANCED PREPAYMENT CAPABILITIES

Previously in PFW, when you went to print the Invoices:

The payment was put on account so someone has to go into PFW and manually apply that payment on account to the respective Invoice.

It would never show that an order had a prepayment on the Invoice so the Invoice displays the original amount, not reflecting a prepayment.

SOLUTION: Prepayments are displayed on the applicable Invoice. This option delays the processing of the payment deposit until an Invoice is printed in Messenger, then an Invoice number is assigned to the payment before it is written to PFW.

SHIPPING DOCUMENTS PREFERENCE AND RECREATE

Shipping documents can now be automatically processed like Sales Order and Invoices. Using BatchMasterPFW's option to automatically print shipping docs Messenger now reads this BatchMasterPFW option and will print and update the shipping documents and Packing Slips without affecting the attached Invoice.

INCREASED SUBJECT LINE ON E-MAIL SENDS

Subject line has been increased from 30 characters to 254 characters

SELECT INDIVIDUAL PLY FOR "PREVIEW/TEST PRINT"

CHANGE PLY ORDER FUNCTION

Now you can change the order of how your plys appear in Messenger server

CLONE PLY FUNCTION

Easily clone all the settings from ply to new ply.

LIAISON MESSENGER 2.1/2.5 ENHANCEMENTS

This mid-release version of Messenger was made available in the 3rd Quarter of 2002. It was primarily a maintenance release for PFW due to their latest release of PFW 5.1. Customer with an active support maintenance agreement received this update at no charge.

BROADER INTEGRATION

In addition to the database conduits for PFW 5.1, Liaison proudly release the highly anticipated Liaison Messenger 2.5 version which provided database conduits for Microsoft Dynamics GP/SBF (aka, Dynamics and eEnterprise) through version 7.0.

LIAISON MESSENGER 2.0 ENHANCEMENTS

Liaison Messenger was released in the 3rd Quarter of 2001 and included a large number of enhancements and new features as requested from our growing Liaison Messenger and Collector user base.

FEATURE SUMMARY

- Liaison Collector merged into Liaison Messenger
- Auto-add Recipients
- Archive Manager
- Auto Routing for Salesperson, Territories, and Locations
- Bill of Ladings and Shipping Documents
- Liaison CRM Integration
- Auto Purge History
- Multi-Page/Continued Capabilities
- International Dialing Settings
- Lookup Tables for Customer and Vendors
- Include Kitting Items on Invoices and Sales Orders
- Messenger Client accessible in Messenger Server
- Desktop e-mailing and faxing from Messenger Client Recreate

LIAISON MESSENGER 1.5 ENHANCEMENTS

BROADER INTEGRATION

In the 4th Quarter of 2000, Liaison Software Company, LLC announced the maintenance release of Liaison Messenger. The primary purpose of this release was the release of the database conduits for BatchMasterPFW.

LIAISON MESSENGER 1.0 RELEASED

In the 2nd Quarter of 2000, Liaison Software Company, LLC released Liaison Messenger 1.0 and Liaison Collector 1.0.