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Paperless Attachment

by  **MBA Business Software**

Enhance Sage 100 Paperless Office to attach documents to the emails being sent.

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The Paperless Office module allows users to set up PDF and electronic delivery options for all standard reports, journals, and registers as well as most customer, vendor, and employee forms. The setup process for Paperless Office follows a tiered approach allowing it to be set up with options specific to a company, module, customer, vendor, employee (payroll), or individual document. More information about Paperless Office can be found in [Sage's manual for Sage 100](#).

Electronic Delivery Message Maintenance is used to maintain the default messages when using electronic delivery of the PDF documents. The maintenance screen can be accessed by logging into Sage 100 and going to **Modules | Paperless Office | Setup | Electronic Delivery Message Maintenance**. Paperless office, as of the 2018 version, was designed to only have one attachment that is automatically created and sent with the Email.

Purpose of this enhancement

The Paperless Attachment enhancement was created to allow a global attachment for Paperless Electronic Delivery. This enhancement allows emails going through Paperless Office to have one additional attachment.

Examples of this one attachment might be a Terms and Conditions document, a Sales Flyer or a Microsoft Contact File.

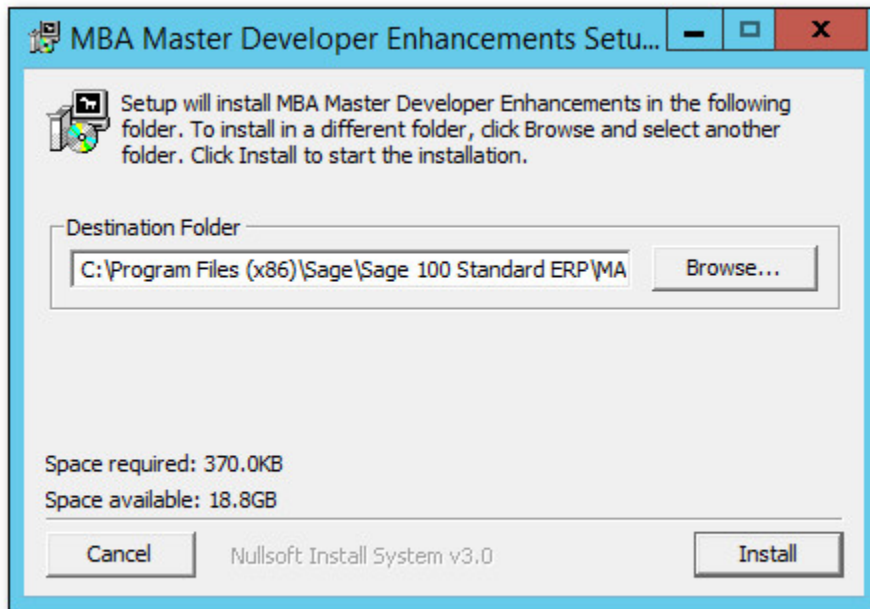
Take Note

Current version only attaches document to:

- Accounts Receivable
 - Invoice
- Sales Order
 - Invoice

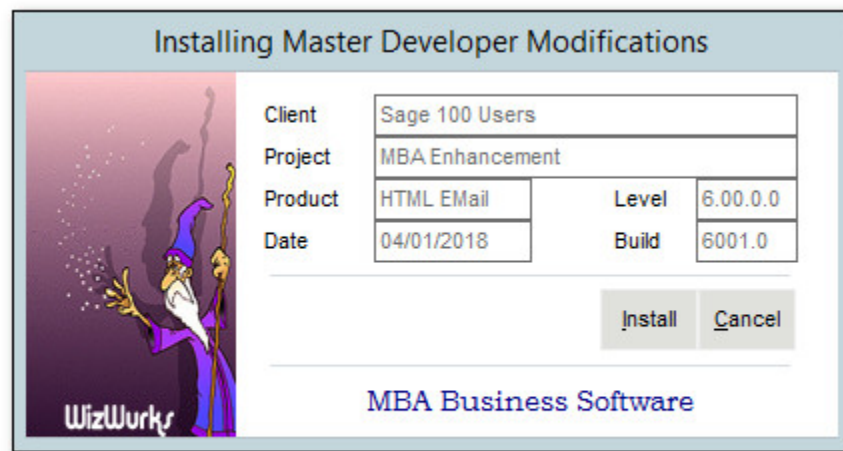
Installation

The enhancement can be downloaded for the version of Sage 100 that is needed by clicking the download links in the [Versions](#) section in this document. The downloaded file will be a self-extracting zip file with only a single executable within the zip file. Extract that executable (.exe) to your desktop or preferred folder and execute by double clicking on the icon. Execute the installation program and follow the instructions. While the installation does not require everyone to be out of Sage 100 before installing, it may be necessary to log out and log back in to display menu changes.



MBA Enhancement Installer

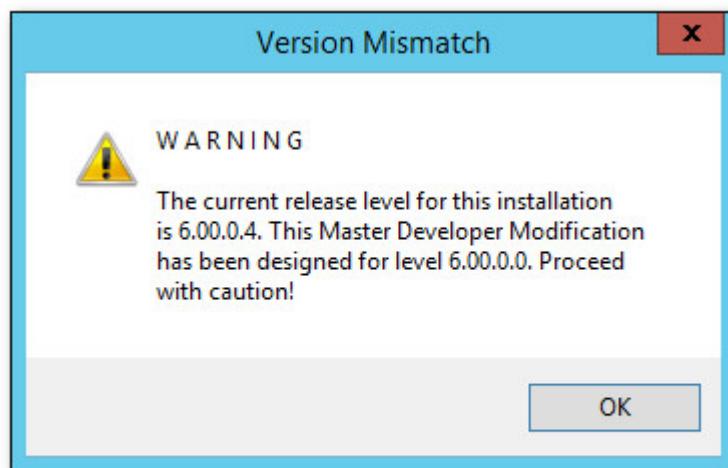
Enter the destination folder of the Sage 100 application. The path should include the MAS90 folder. Example: "C:\Program Files (x86)\Sage 100 Standard ERP\MAS90\". Click on **Install** when done. Files will be extracted to the folder specified and will trigger the Product Install to Sage 100. Click on **Install** to install the Enhancement to Sage 100.



MBA Enhancement Installer - Product Install

Version Difference Warning

If there is a version difference a Version Mismatch Warning will appear.



MBA Enhancement Installer - WARNING

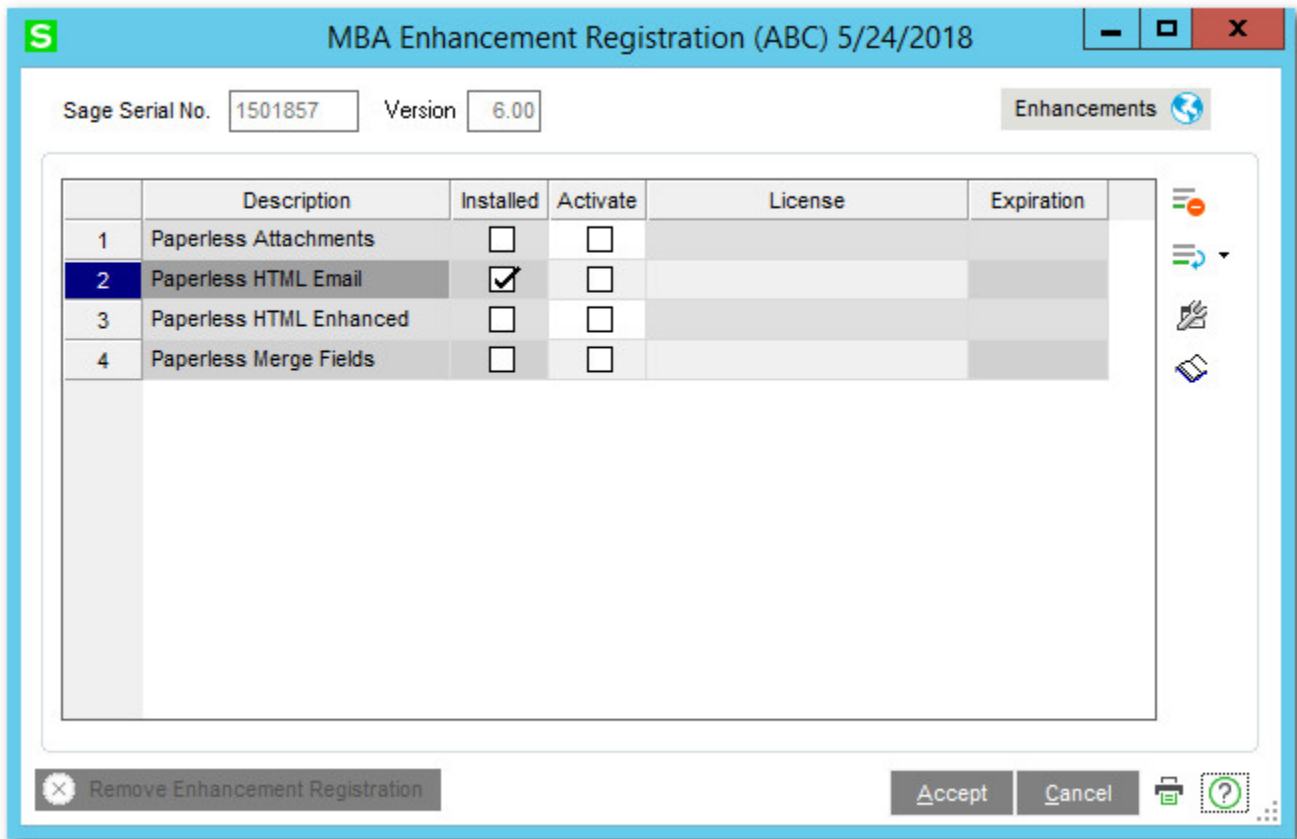
This warning is expected if product updates have been installed. If the first two sets of numbers, 6.00 in the example shown, match then click on **OK**. If they do not match click on the red **X** and exit the installation. The correct version of the modification will need to be downloaded.

Once it is done installing the Enhancement, there will be two buttons displaying, **Finish** and **Log**. Click on the **Finish** button to complete the install process. If an error occurred on the screen or to validate the install, click on the **Log** button to view the install log. At this point, the Enhancement has been installed.

Prior to using the Enhancement, it must be registered.

Registration

Once the enhancement has been installed it must be registered for it to be active. Access to registration will have to be assigned to a user or group to have access to registration. To assign permissions, go to **Modules | Library Master | Main | Role Maintenance**. Enter the role assigned to the user or group that will need to have access to the MBA Enhancement Registration and click on the **Tasks** tab. Navigate to **Library Master | Maintenance/Data Entry | MBA Enhancement Registration** and make sure it is checked to allow access. To register the enhancement, the user must have at least **View** and **Modify** checked. If uninstalling an enhancement, **Remove** must be checked. To launch registration, go to **Modules | Library Master | Utilities | MBA Enhancement Registration**.




Enhancement Registration



A list of MBA enhancements will be displayed in the registration. The listing of an enhancement does not mean that you have installed it or that you have access to use it.

Each enhancement that has been installed will display a check in the box in the column called **Installed**. The check box in the **Activate** column will appear once the enhancement has been successfully registered. If there is not a check mark, when clicking in the box, it will open a web page to the online ordering for that enhancement. Once a license key has been generated, enter it in the license column. If the license is valid, a check mark will appear in the **Activate** column. If the enhancement has an expiration date, the **Expiration** column will display the last day that the enhancement will work without being renewed.



Key Information

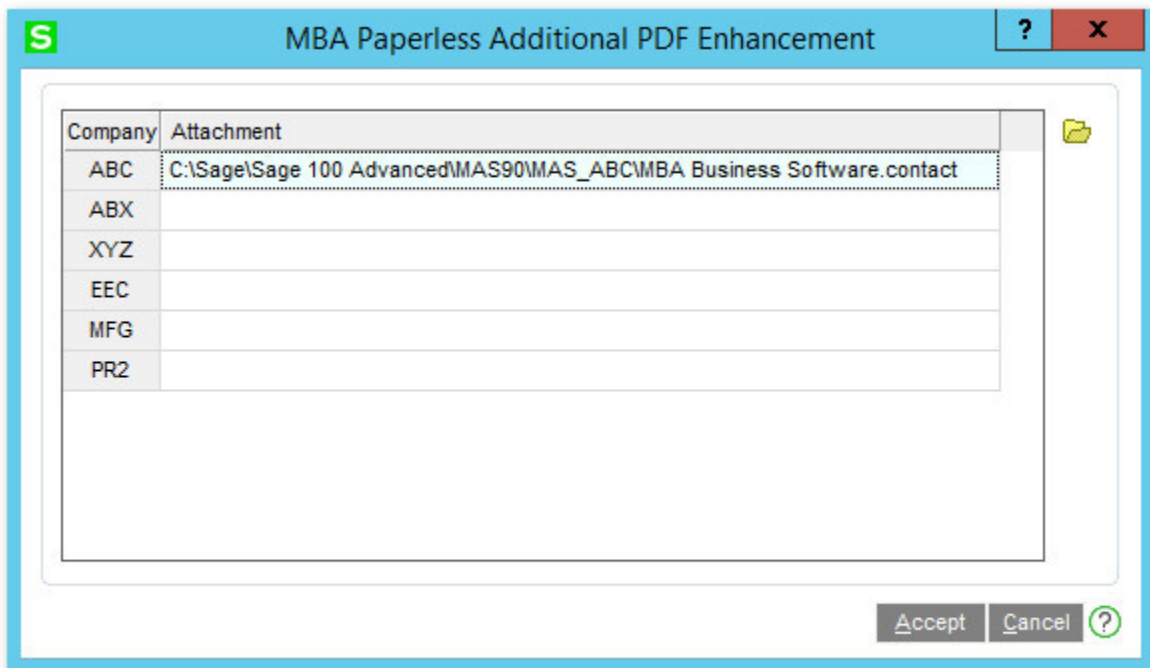
License keys will have the enhancement code followed by a 10 digit number. They are specific by enhancement and by the serial number of the installation.

Changes to a line can be undone by clicking on the **Reset**  button. All rows can be reset by clicking on the drop down arrow on the **Reset** button and clicking *Reset All Rows*.

The **Print**  button will print a list of all the enhancements indicating what has been installed and activated along with other information such as the description, license key and the expiration. This documentation can be accessed from the MBA Enhancement Registration by clicking on the help  button. When done making changes or registering enhancements, click on the **Accept** button to close the MBA Enhancement Registration. Clicking on **Cancel** will close the screen without any changes being saved.

Setup and configuration

System Wide enhancement options are accessed through **Modules | Library Master | Utilities | MBA Enhancement Registration**. Click on the enhancement description to access its configuration. This documentation can be accessed by clicking on the **Manual**  button. This enhancement has a system wide configuration. To access it, click on the **Configure**  button in the MBA Enhancement Registration screen.



Paperless Attachment - Options

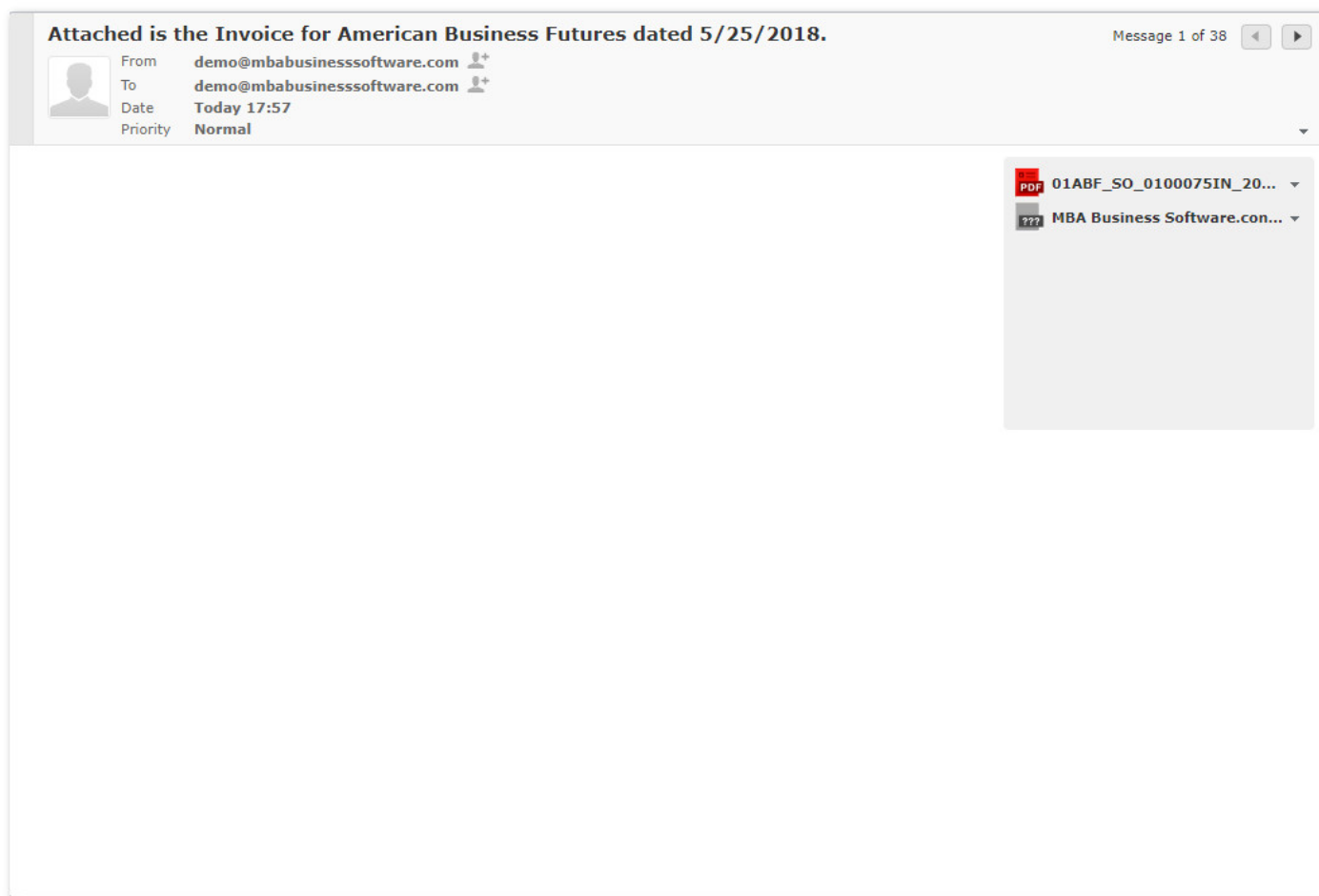
Enter the path to the attachment or click on the **browse**  button and search for the file you wish to

attach.

Path must be accessible by all users

Attachment will not be attached to Email if the file is not accessible by the user processing through Paperless Office electronic delivery.

Once the additional attachment has been set in the options, click on **Accept** on the options screen. Then click on **Accept** on the MBA Enhancement Registration screen. When an email is sent the additional attachment will be added to the email as shown below.



Paperless Attachement - Email with additional attachment

In this example, the standard invoice has been attached as well as our additional attachment which happens to be a Microsoft Contact file.

Uninstalling

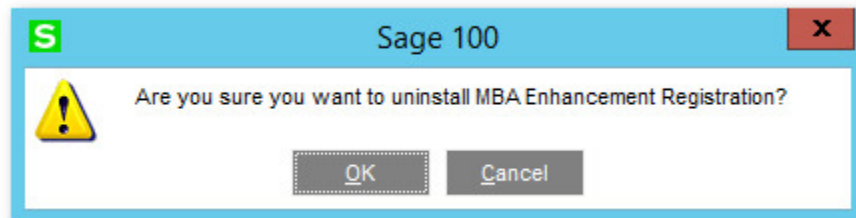
To uninstall an Enhancement, launch the registration program **Modules | Library Master | Utilities | MBA Enhancement Registration**. Select the Enhancement from the grid and press the **Uninstall** button. This will remove the enhancement from the system. A message box will appear stating which enhancement is being uninstalled.



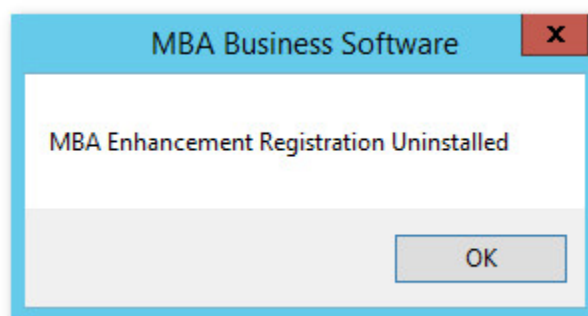
Click on **OK** to uninstall or **Cancel** to go back to the MBA Enhancement Registration without making any change. When an enhancement is removed the check box under **Installed** will be unchecked and the license with expiration date will be removed.

WARNING! Any enhancement that has been uninstalled will need to be reinstalled before it can be registered and used again.

Once all enhancements have been uninstalled, the **MBA Enhancement Registration** can be removed by clicking on the **Remove Enhancement Registration** button. This button is only activated once all enhancements have been uninstalled. A message box will appear stating that it will uninstall the MBA Enhancement Registration.



Click on **OK** to remove it or click **Cancel** to return to the MBA Enhancement Registration without making any change. A message will display when the files have been removed. Click on **OK** to close the window.



When the MBA Enhancement Registration is removed, users will need to exit out of Sage 100 to have their menu updated. Once the menu is updated, the menu item for MBA Enhancement Registration is

removed.

Take Note

Uninstall vs Deactivate

Before Uninstalling the Enhancement, which removes your License and Expiration, consider just de-activating the Enhancement by un-checking the box under the **Activate** column. Your Enhancement will not function until you re-activate the Enhancement by checking in the box under the **Activate** column.

Support

For support on this or any other MBA Business Software Enhancement, please send us an email via our [contact page](#).

Troubleshooting

Paperless Attachment only works when the following requirements are met:

1. Enhancement must be installed
2. Enhancement must be registered
3. File path has been set for the specific company

If the file path has been specified, then check to make sure that the product is installed and registered. Check Registration by going to **Modules | Library Master | Utilities | MBA Enhancement Registration**. Navigate to the line for Paperless Merge Fields enhancement. Confirm that there is a check box in **Install** and **Activate**. There should be a date in the **Expiration** column. Confirm that the date is valid and has not expired. If it has expired, then the subscription for the enhancement will need to be purchased or renewed.

List of Files Changed

These are the files that have been changed

Paperless Attachment Fields	Type	Description
Links\SY_EmailEngine.PVC	Override trigger	Indicates an override exists
SY\SY106_PDF_EmailEngine.pvc	Class Override	Changes Email Engine
SY\SY106_PDF_EmailEngine_UI.pvc	Class	Attachment Options User Interface
SY\SY106_PDF_EmailEngine.M4L	Panel Library	Attachment Options Panel

MBA Enhancement Library	Type	Description
SY\SY106_Enhancement_SVC.PVC	Class	Enhancement Service Object
SY\SY106_INI_SVC.PVC	Class	INI Service Object
SY\SY106_License.M4L	Panel Library	License Panel Library
SY\SY106_License.PVC	Class	License
SY\SY106_License_BUS.PVC	Class	License Business Object
SY\SY106_License_SVC.PVC	Class	License Service Object
SY\SY106_License_UI.PVC	Class	License User interface
SY\SY106_Lister_SVC.PVC	Class	Lister Service Object
SY\SY106_Nomads.PVC	Class	Nomads Enhancements
MAS_System\SY106_Enhancement.M4T	Class	Table of MBA Enhancements
MD\MD106_Ini_SVC.pvc	Class	INI Service Object
MD\MD106_Install.M4L	Panel Library	MBA Install Panel Library
MD\MD106_Install.M4P	Program	Installation Program
MD\MD106_Install_BUS.pvc	Class	Install Business Object
MD\MD106_Install_UI.pvc	Class	Install User Interface
MD\MD106_UpdateLibrary.PVC	Class	Install Panel Update
Launcher\WizWurks.bmp	Image	Logo for Install
MBA_Install.ini	INI File	MBA Install Configuration File
Reports\SY106_LicenseListing.rpt	Crystal Report	List of MBA Licenses and enhancements

Versions

Paperless Attachment is available in the versions listed below. If your version is not listed, please send us an email via our [contact page](#). The download links will be available after an account is created on our website and a license has been released.

Sage 100 Version
Sage 100 2013 (5.00)
Sage 100 2014 (5.10)
Sage 100 2015 (5.20)
Sage 100 2016 (5.30)
Sage 100 2017 (5.40)
Sage 100 2018 (6.00)

Additional Notes

Related information about the Enhancement, this website, and its documentation

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This document is located at

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