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# Paperless HTML Email



Enhance your Sage 100 Paperless Office Emails with HTML. Add a signature tag, link to social media, and make the email look the way you want it to look instead of plain text.

[Free Download](#)

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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 allow only the body of the electronic delivery to use plain text for the message.

Electronic Delivery Message Maintenance (ABC) 4/27/2018

Document Type: Customer Forms

Company Code: ALL (All Companies)

Module Code: A/R (Accounts Receivable)

Document: Invoice

Subject: <ent> for <CustomerName> dated <DocumentDate> Insert Merge Field

<CustomerName>,  
Attached is your <Document> #<DocumentNo> for <CompanyName>. Please keep this <Document> for your records. If you have any issues, please feel free to call us at 555-365-4575.  
Thanks,  
Susan Maye  
ABC Demo Company

Accept Cancel Delete

Electronic Delivery Message Maintenance with plain text body

## Purpose of this enhancement

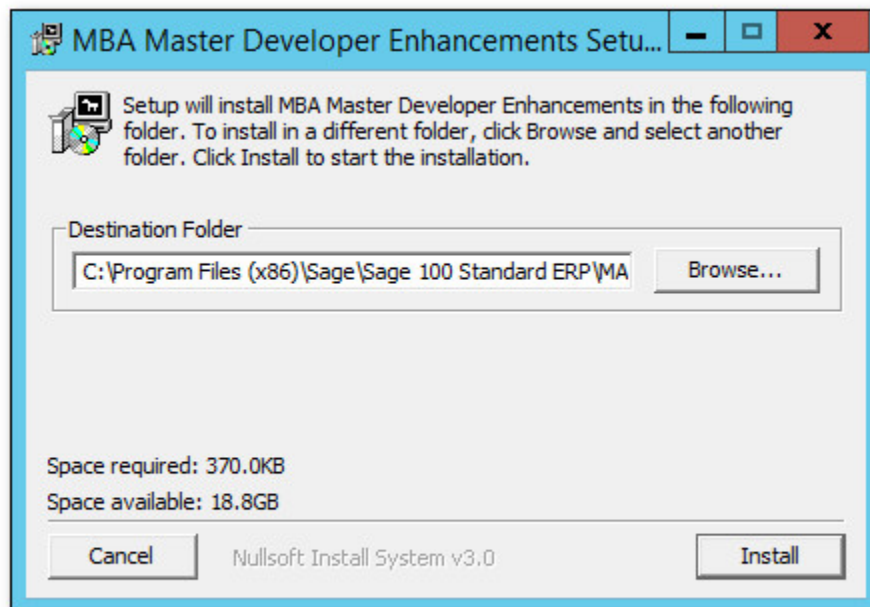
The Paperless HTML Email enhancement was created to allow Hypertext Markup Language (HTML) code to be entered, as well as plain text, in the body of the Electronic Delivery. By allowing HTML to be entered in the body, the email being sent can have logo's, tables, and other formatting that coordinates with the companies existing brand. It will allow for linking to websites and Social Media.

This enhancement **DOES NOT WORK WITH FAX DELIVERY**. If Fax Delivery is used as one of the options of Electronic Delivery, this modification may have unexpected results. Only use this enhancement if using E-Mail delivery for Electronic Delivery.

## 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

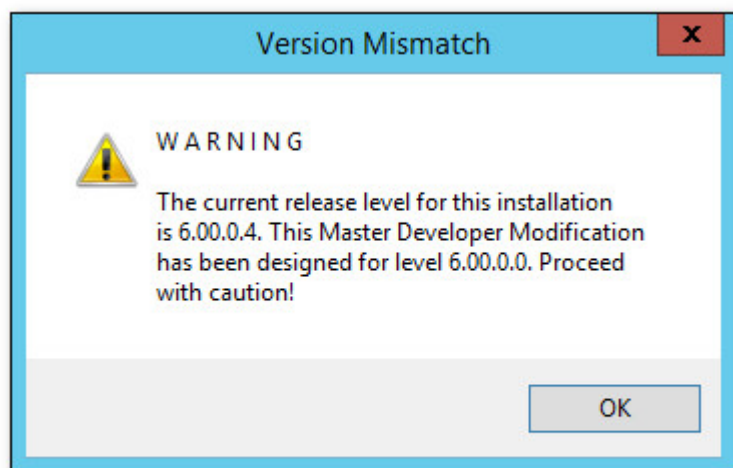
Enter the destination folder of the Sage 100 application. The path should include the MAS90 folder. Example: "C:\Program Files (x86)\Sage 100 Standard ERP\MAS90\". Click on **Install** when done. Files will be extracted to the folder specified and will trigger the Product Install to Sage 100. Click on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

### e-Business Users

If using e-Business, this Enhancement can be extended to **Modules | eBusiness Manager | E-mail Notification Maintenance**. To use this enhancement with e-Business, copy the file SY\_EmailEngine.PVC from the ".\MAS90\Links" folder to the ".\WEBENG\Links" folder used by e-Business.

## 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.

**Sage Serial No.** 1501857 **Version** 6.00 **Enhancements**

	Description	Installed	Activate	License	Expiration
1	Paperless Attachments	<input type="checkbox"/>	<input type="checkbox"/>		
2	Paperless HTML Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
3	Paperless HTML Enhanced	<input type="checkbox"/>	<input type="checkbox"/>		
4	Paperless Merge Fields	<input type="checkbox"/>	<input type="checkbox"/>		

Remove Enhancement Registration Accept Cancel Print Help

### 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 enhancement does not have any system wide configuration so the **Configure**  button in the MBA Enhancement Registration screen will be grayed out. This documentation can be accessed by clicking on the **Manual**  button.

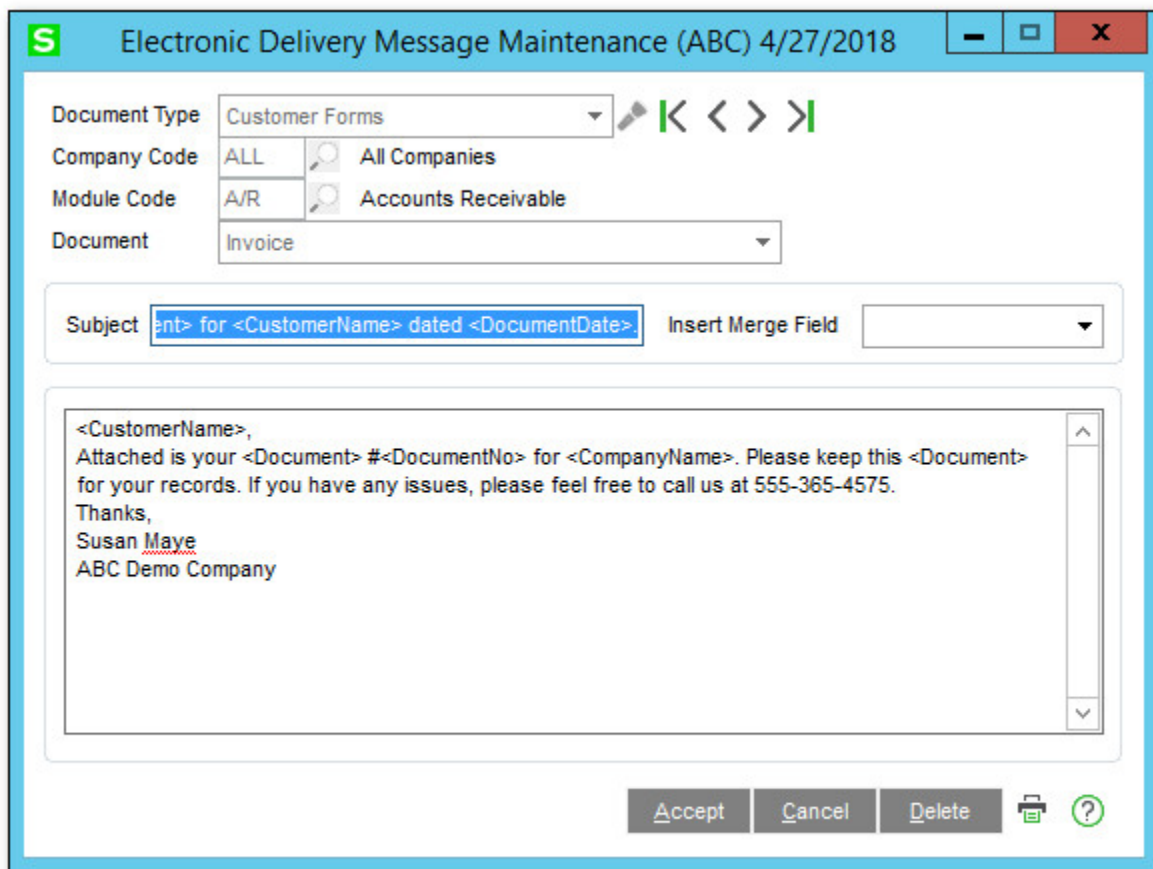
The editing of the emails to have HTML can be done in two places:

1. Paperless Office
2. eBusiness Manager

### Paperless Office

The maintenance of emails for Paperless Office is done in **Electronic Delivery Message Maintenance**. To access this maintenance screen go to **Modules | Paperless Office | Setup | Electronic Delivery Message Maintenance**.



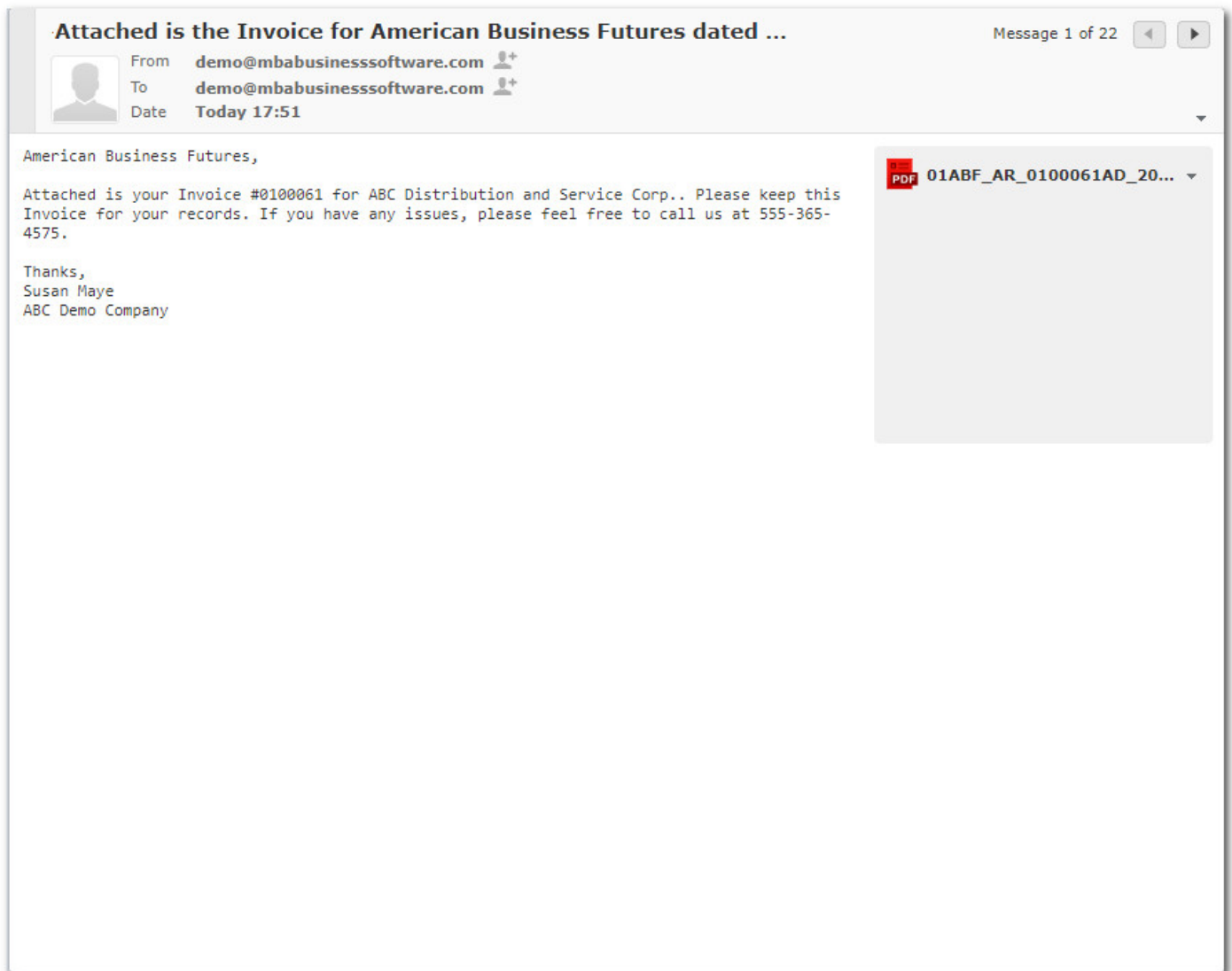


Electronic Delivery Message Maintenance with plain text body

Document Types can be Customer Forms, Vendor Forms, Employee Forms, Reports, Journals and Registers, and Period End Reports. Each Document can be setup by Company and will have a Subject Line along with the Message Body.

**Warning!** This enhancement **DOES NOT WORK WITH FAX DELIVERY**. If Fax Delivery is used as one of the options of Electronic Delivery, this modification may have unexpected results. Only use this enhancement if using E-Mail delivery for Electronic Delivery.

Select the Document type, company code, module code and document that is to be configured for sending HTML emails. HTML tags can be entered in the body of the email. The subject line does NOT support HTML tags, and if used in the subject, the tag itself will be shown to the user receiving the email. The example above shows how the standard plain text email from paperless would be setup. It has merge fields like <Document> in the subject and the body. Any links to websites are plain text and no images exist in the email. The result to the customer receiving the Invoice would appear as plain text as shown below.



Paperless HTML Email - Example Email

### Tip

If there are no HTML tags in the message body, then the message will be sent as plain text.

With the Paperless Office HTML enhancement installed and active, HTML can now be used in the body of the email. Below is the same document but instead of using plain text, HTML markup is used.

**Electronic Delivery Message Maintenance (ABC) 5/25/2018**

Document Type: Customer Forms

Company Code: ALL All Companies

Module Code: A/R Accounts Receivable

Document: Invoice

Subject: ent> for <CustomerName> dated <DocumentDate> Insert Merge Field

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
<title>Paperless Email</title>
<meta name="viewport" content="width=device-width, initial-scale=1.0"/>
</head>
<body style="margin: 0; padding: 0; background: #e8e8e8;">
<table align="center" border="1" cellpadding="0" cellspacing="0" width="600">
<tr>
```

Accept Cancel Delete

### Paperless HTML Email - Example HTML Email Setup

The merge field <Document> exist in the subject and in the body, like it did in the previous example. The body has multiple tables as well as multiple images. Links to websites exist within the text of the body.

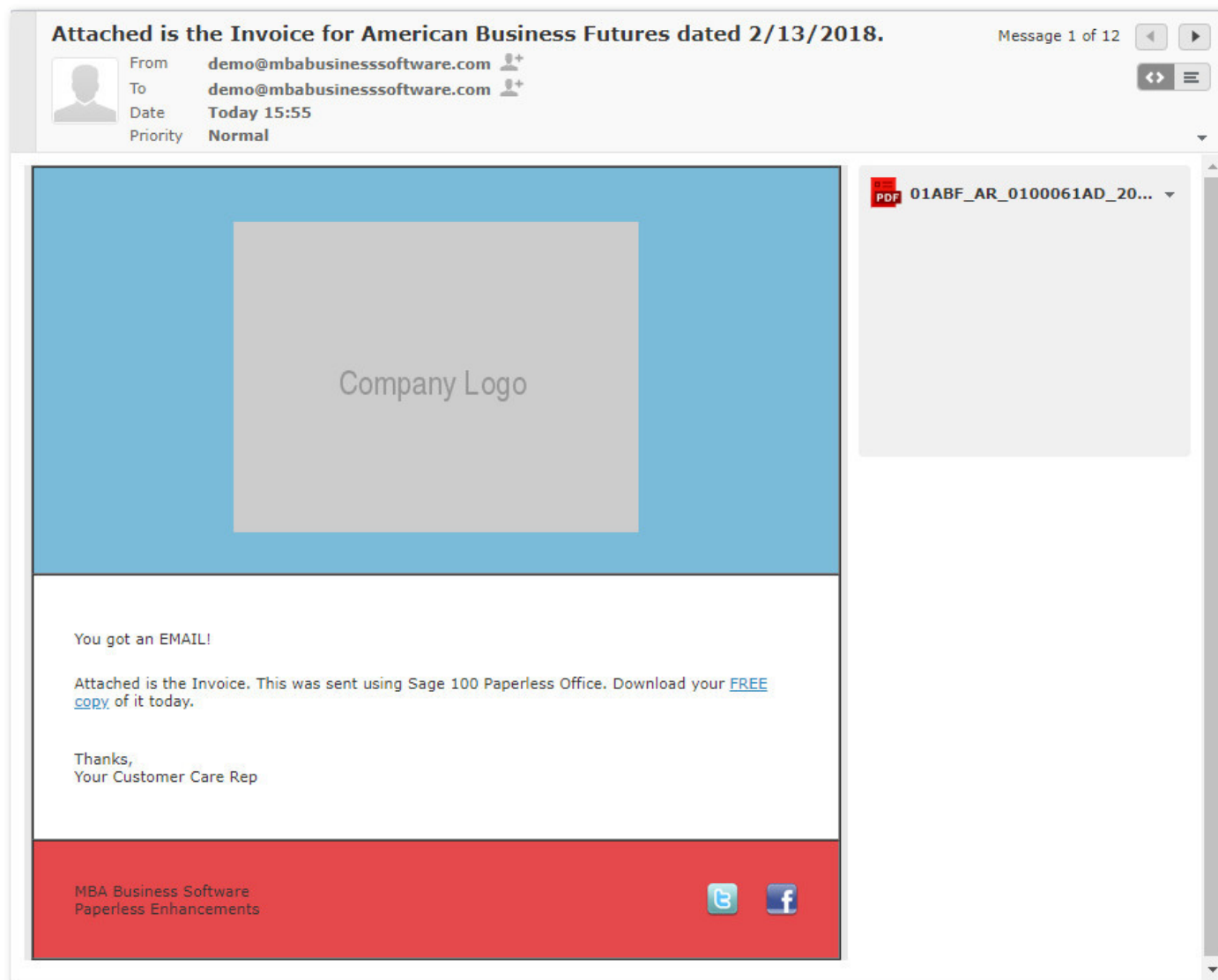
#### Key Information

The number of characters that the body allows has not been modified and is using the maximum size available of 4096.

#### Additional Enhancements Available

This enhancement does not increase the size of the field that stores the body content. Please refer to our enhancement, [HTML Email Advanced](#), if a larger size HTML body is required.

When the email is received, it will look like the sample below.



Paperless HTML Email - Example HTML Email

## WARNING!

Not all email applications display HTML. Not all HTML is displayed the same way from application to application.

## e-Business Manager

The maintenance of emails from the webengine in eBusiness Manager is done in **E-mail Notification Maintenance**. To configure emails sent from e-Business Manager go to **Modules | eBusiness Manager | Setup | E-mail Notification Maintenance**. Select the Notification to be modified. Just as in Paperless Office, the subject and body of the message can have text entered.

**E-mail Notification Maintenance (ABC) 5/25/2018**

Notification: Request for User ID & Password

Notify:

User ☒ Webmaster ☐  
Client Supervisor(s) ☐ Salesperson ☐  
Other E-mail:

Subject: Request User ID and Password Insert Merge Field

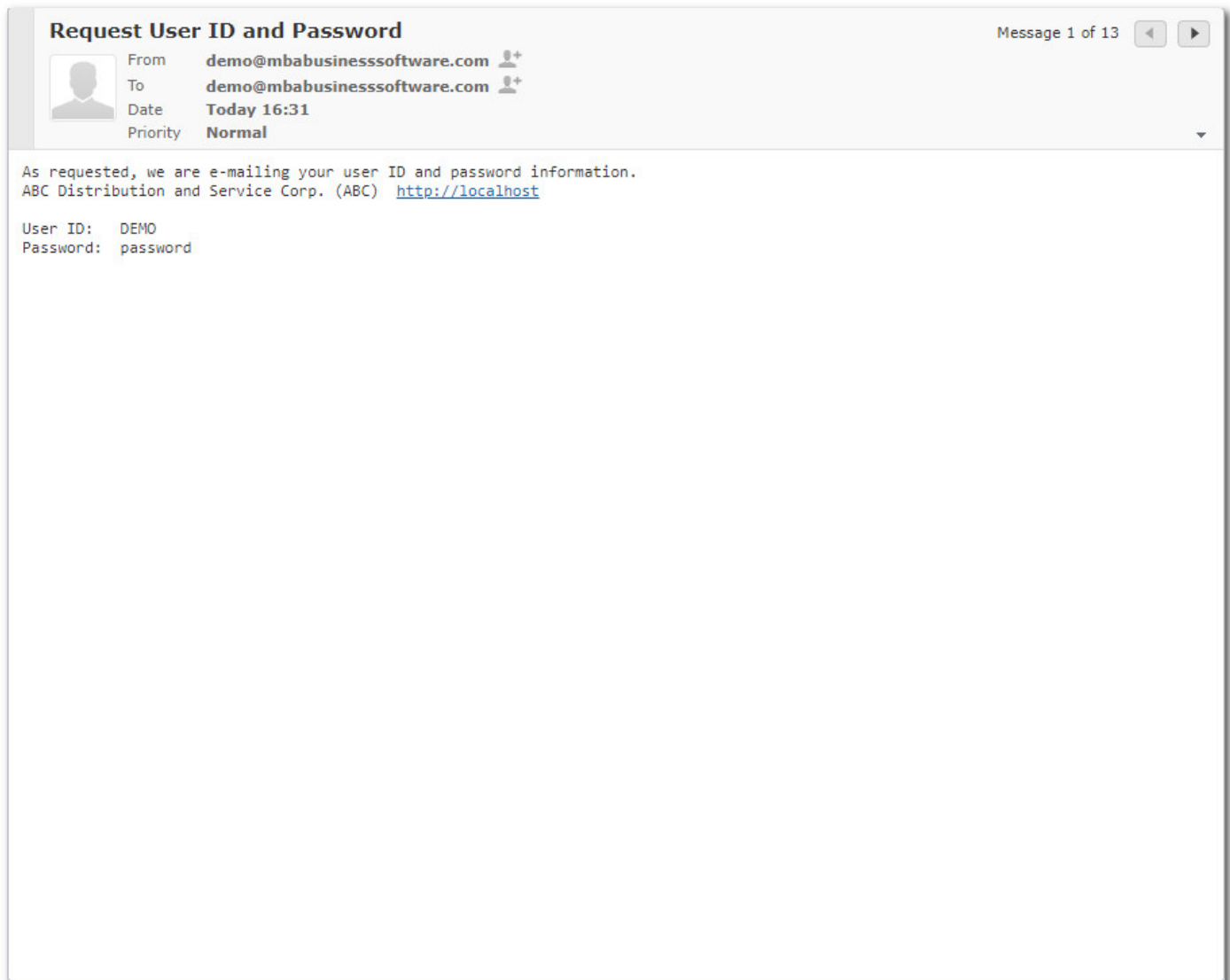
As requested, we are e-mailing your user ID and password information.

<<USER\_INFORMATION>>

Accept Cancel [Printer Icon] [Help Icon]

E-Mail Notification Maintenance with plain text body

This sample shows how the standard plain text email from eBusiness would look. It has merge fields like «USER\_INFORMATION» that can be in both the subject and the body of the email. When the email is sent as plain text it will look like this:



Paperless HTML Email - Example Plain Text Email

### Tip

If there are no HTML tags in the message body, then the message will be sent as plain text.

With the Paperless Office HTML enhancement installed and active, HTML can now be used in the body of the email. Below is the same document but instead of using plain text, HTML markup is used.

**E-mail Notification Maintenance (ABC) 5/25/2018**

Notification: Request for User ID & Password

Notify:

User ☒ Webmaster ☐

Client Supervisor(s) ☐ Salesperson ☐

Other E-mail:

Subject: Request User ID and Password

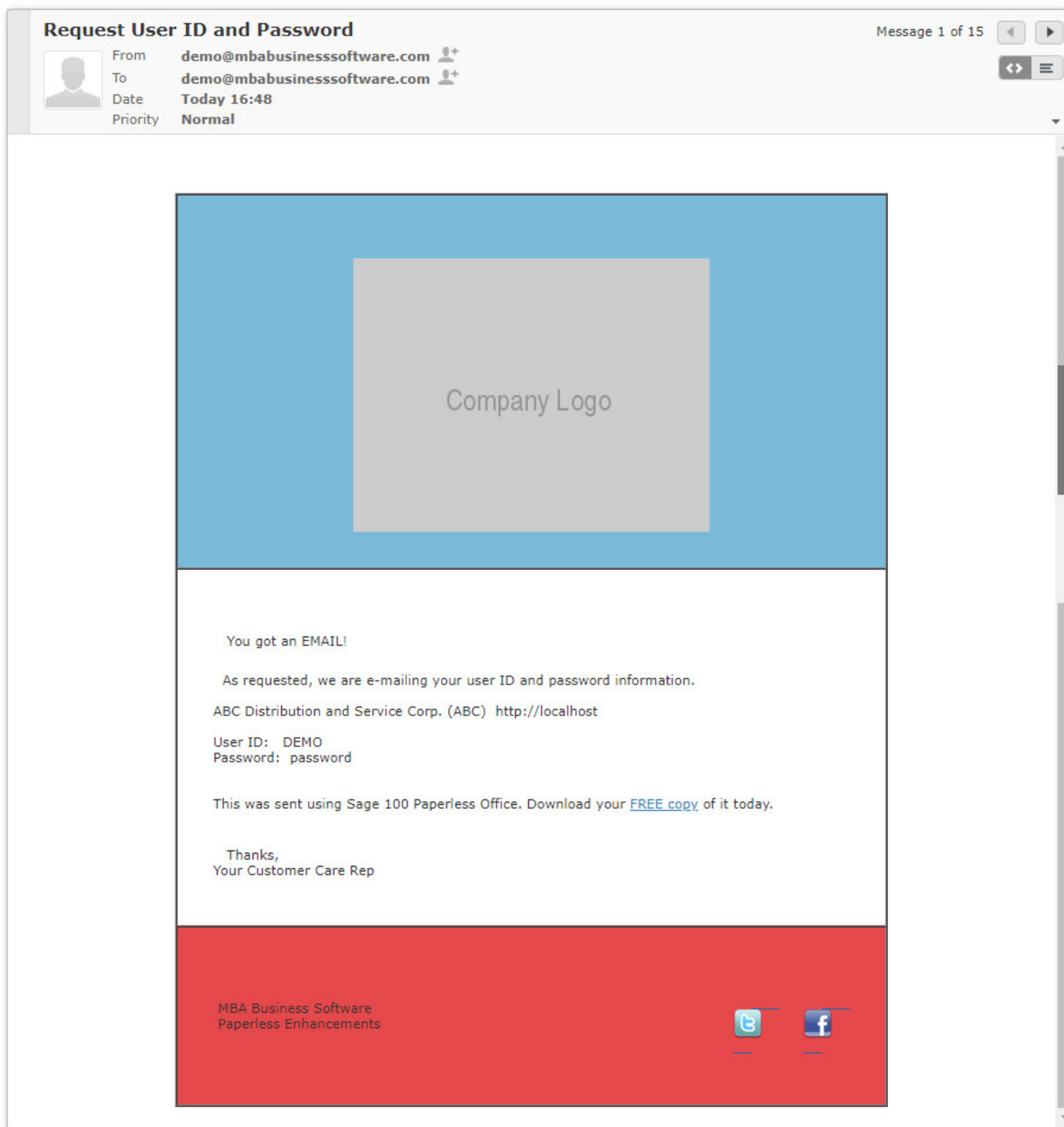
Insert Merge Field:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
<title>Paperless Email</title>
<meta name="viewport" content="width=device-width, initial-scale=1.0"/>
</head>
<body style="margin: 0; padding: 0; background: #e8e8e8;">
<table align="center" border="1" cellpadding="0" cellspacing="0" width="600">
<tr>
```

Accept Cancel ?


### Paperless HTML Email - Example eBusiness HTML Email Setup

In this sample with HTML markup, it shows how the enhancement allows for HTML. The merge field «USER\_INFORMATION» exists in the subject and in the body, like it did in the previous example. The body has multiple tables as well as multiple images. Links to websites exist within the text of the body.



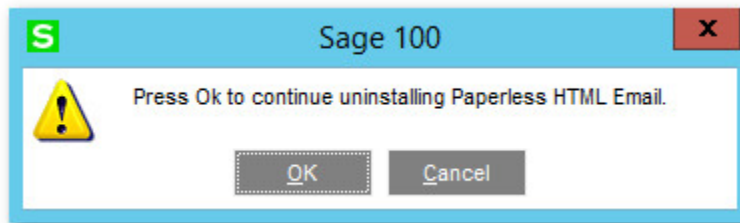
Paperless HTML Email - Example eBusiness HTML Email

## 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.



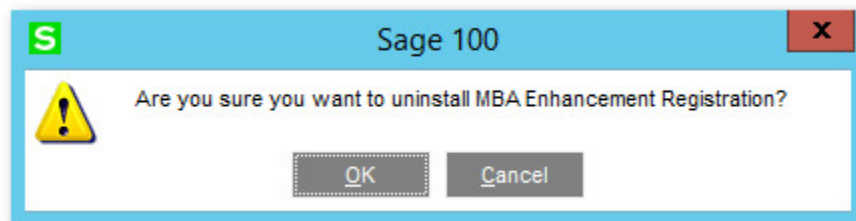
Click on **OK** to uninstall or **Cancel** to go back to the MBA Enhancement Registration without making any change. When an enhancement is removed the check box under **Installed** will be unchecked and the license with expiration date will be removed.

### Extra Step for eBusiness Users

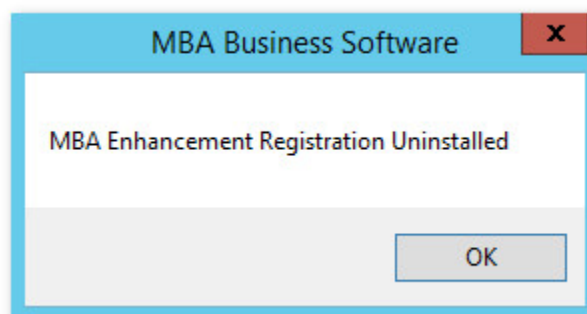
If Paperless Office HTML enhancement has been setup for eBusiness, the file `webeng\links\sy_EmailEngine.pvc` will have to be manually removed.

**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 HTML Email only changes your email sent from Sage 100 to an HTML format when a few requirements are met:

1. Enhancement must be installed
2. Enhancement must be registered
3. Body of the email must have expected HTML tags

If the outgoing email is displaying the HTML tags when it is sent, then it usually indicates that the system doesn't have a valid registration. Check Registration by going to **Modules | Library Master | Utilities | MBA Enhancement Registration**. Navigate to the line for Paperless HTML enhancement. Confirm that there is a check box in **Install** and **Activate**. Since this enhancement is free, it is expected to have a blank **Expiration** value.

The `.\MAS90\Links` folder should have a file called `SY_EmailEngine.PVC`. If this doesn't exist, make sure that it was not moved or deleted. If the file no longer exists, then reinstall the enhancement. If the system is not sending HTML for eBusiness users, confirm that the instructions were followed to [copy the required files](#) to the webengine folder.

## List of Files Changed

These are the files that have been changed

<b>Paperless HTML Email</b>	<b>Type</b>	<b>Description</b>
Links\EmailEngine.PVC	Override trigger	Indicates an override exists
SY\SY106_HTM_EmailEngine.PVC	Class Override	Change Paperless Email to HTML
<b>MBA Enhancement Library</b>		<b>Description</b>
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 HTML Email 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.

<b>Sage 100 Version</b>
<a href="#">Sage 100 2013 (5.00)</a>
<a href="#">Sage 100 2014 (5.10)</a>
<a href="#">Sage 100 2015 (5.20)</a>
<a href="#">Sage 100 2016 (5.30)</a>
<a href="#">Sage 100 2017 (5.40)</a>
<a href="#">Sage 100 2018 (6.00)</a>

## Additional Notes

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

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## **Subject to Change**

Information on this website is subject to change without notice.

## **Where is this Documentation**

This document is located at

<http://wiki.mbabsi.com/doku.php/enhancements/sage100/paperless/cs100p-html>

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## Contact Information

MBA Business Software

6100 Lake Forrest Drive

Suite 520

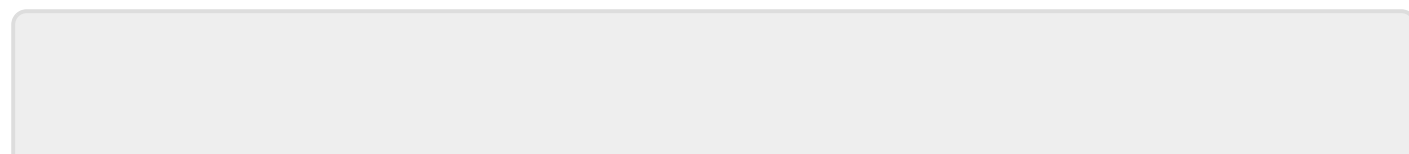
Atlanta, GA 30338

678-495-5700 8:00 am to 5:00 pm EST

<http://www.mbabsi.com>

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