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Paperless Merge Fields

by  **MBA Business Software**

Enhance Sage 100 Paperless Office merge fields to include more fields specific to the document 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 allow a handful of generic merge fields.

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: <Document> 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

This enhancement will allow additional fields from the document and the entities associated with the document to be placed in the email body or subject. Electronic Delivery Message Maintenance merge fields change based on the document selected. As an example, when Invoice is selected as a Document, the following fields are available:

- <CompanyName>
- <CustomerName>
- <CustomerNo>
- <Document>
- <DocumentDate>
- <DocumentNo>
- <InvoiceType>

This enhancement enhances the default merge fields with a much larger list of merge fields that are related specifically to the document.

For example, Invoice emails can contain fields from the AR_Customer, AR_CustomerPDFLog,

AR_InvoiceHeader, AR_Salesperson and SY_Company. In our case, the body of the email can have the Invoice Due Date and include the salesperson's name and contact info.

Take Note

Current version only increases merge fields for:

- Customer Forms
 - Accounts Receivable
 - Invoice
 - Sales Order
 - Order
 - Invoice

Calculations

Calculations can be entered in the Email Message as well. For example, when sending out an email for Sales Order, you might want to show the total of the order. That calculation requires totaling five fields from the Sales Order Header table. To enter that calculation you would place the following in the Email Message.

```
{=STR([SO_SalesOrderHeader.TaxableAmt]+[SO_SalesOrderHeader.NonTaxableAmt]+[SO_SalesOrderHeader.FreightAmt]+[SO_SalesOrderHeader.SalesTaxAmt]-[SO_SalesOrderHeader.DiscountAmt]:"###,##0.00-")}
```

The fields inside the square brackets are all replaced first, then the calculation is made within the braces. The return of the calculation must always be a string. Inside the braces is calculated as a ProvideX equation. The next example shows how to spell out abbreviations like Order Type which is a S for Standard, B for Backorder, etc.

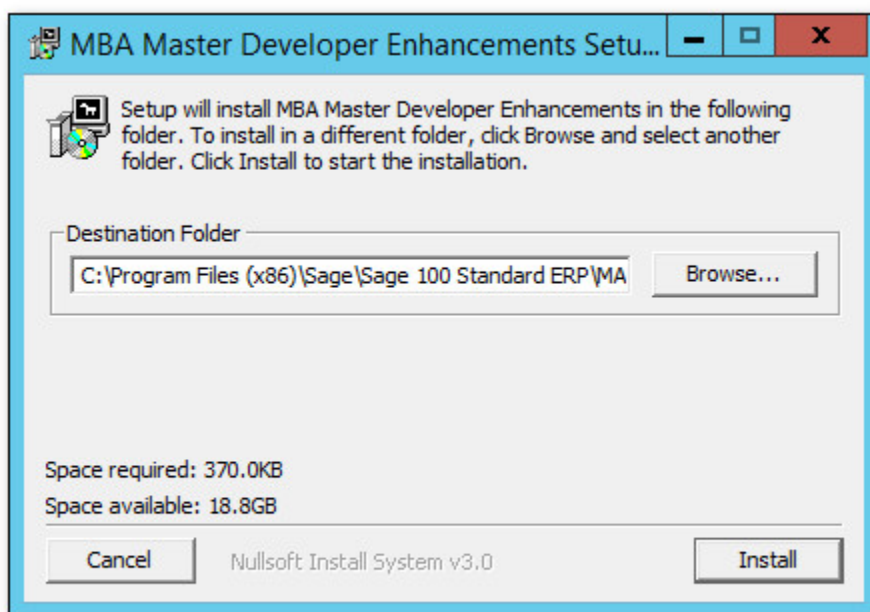
```
{=TBL([SO_SalesOrderHeader.OrderType$]="SBQMR", "", "Standard", "Backorder", "Quote", "Master Order", "Repeating Order")}
```

Calculations like this make the Email Messages very readable.

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

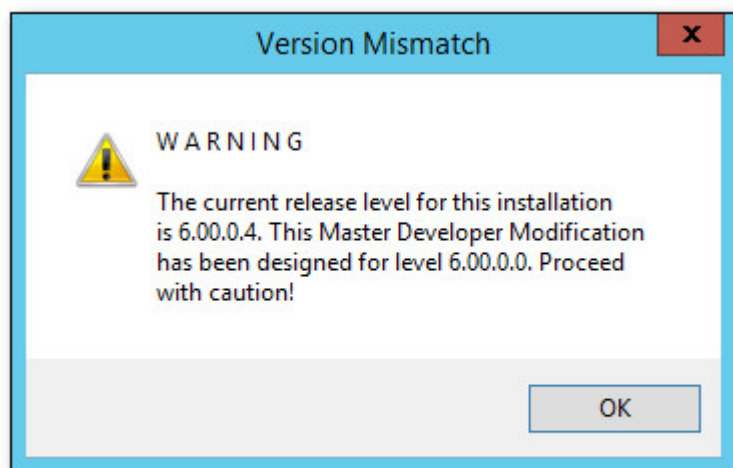
Enter the destination folder of the Sage 100 application. The path should include the MAS90 folder. Example: "C:\Program Files (x86)\Sage 100 Standard ERP\MAS90\". Click on **Install** when done. Files will be extracted to the folder specified and will trigger the Product Install to Sage 100. Click on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

	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"/>		


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*.

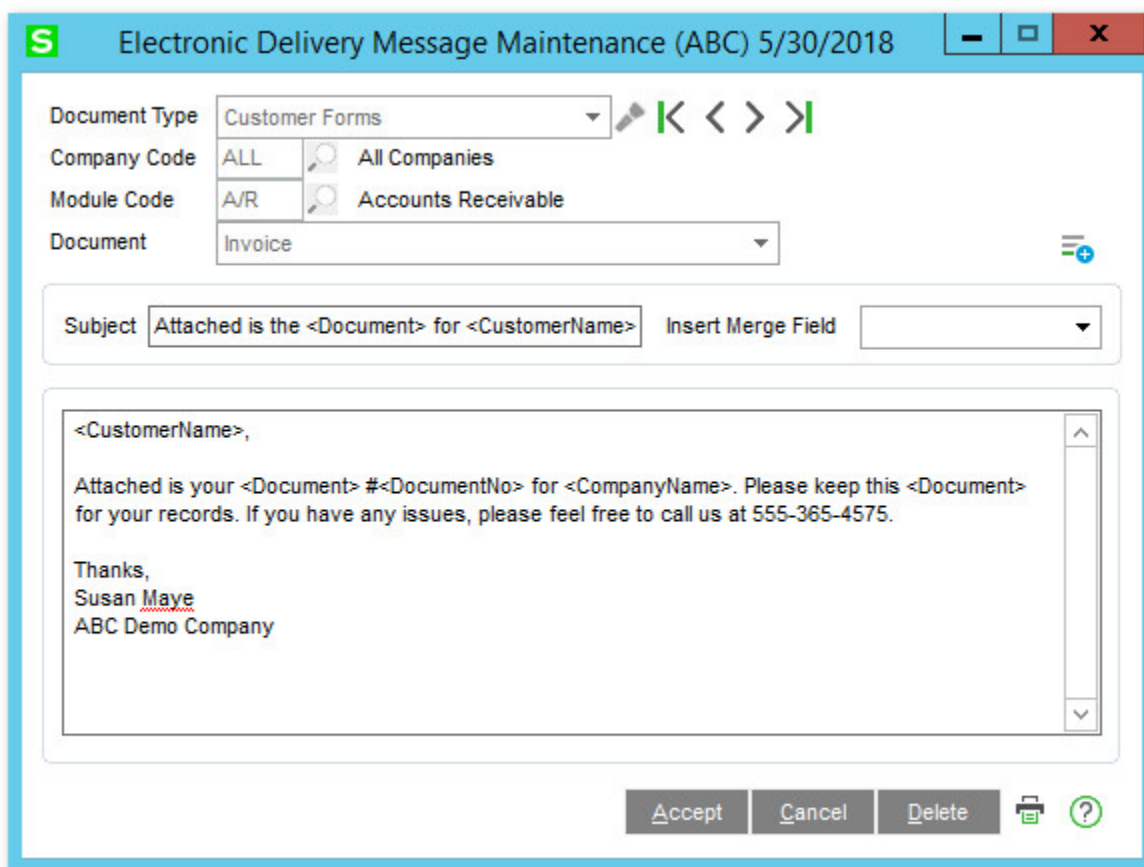
The **Print**  button will print a list of all the enhancements indicating what has been installed and

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 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 (ABC) 5/30/2018

Document Type: Customer Forms



Company Code: ALL All Companies

Module Code: A/R Accounts Receivable


Document: Invoice

Subject: Attached is the <Document> for <CustomerName> Insert Merge Field

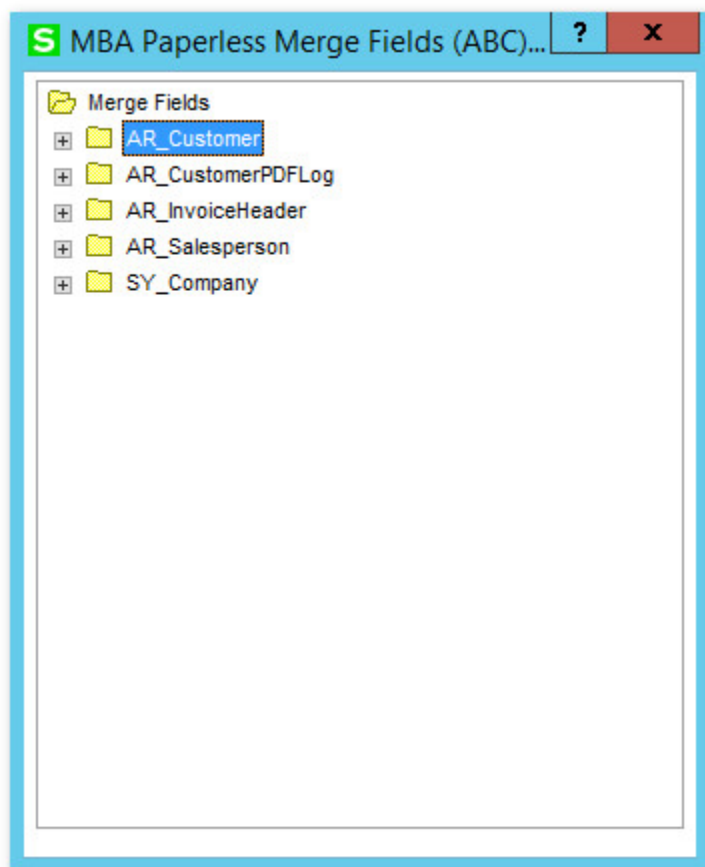
<CustomerName>,
Attached is your <Document> #<DocumentNo> for <CompanyName>. Please keep this <Document> for your records. If you have any issues, please feel free to call us at 555-365-4575.
Thanks,
Susan Maye
ABC Demo Company

Accept Cancel Delete  

Paperless Merge Fields - Electronic Delivery Message Maintenance

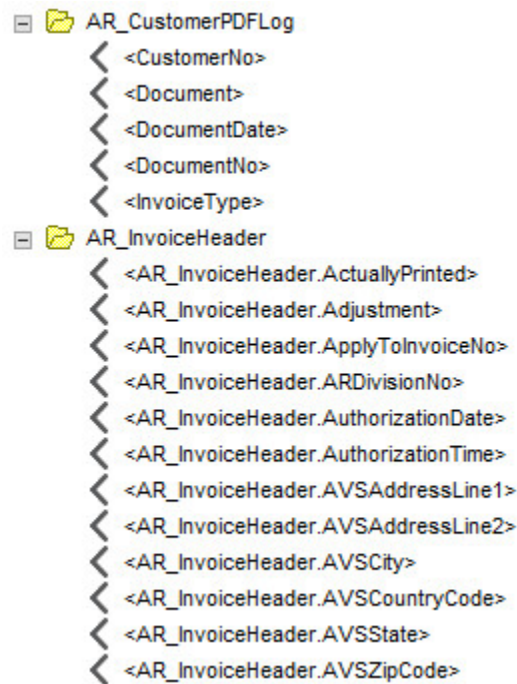
The field drop down for "Insert Merge Field" has been expanded to include additional tables and fields. Due to the length of the field names, the drop down is not the most convenient way to select the merge field to insert. A new **Field Explorer**  button has been added to allow easy navigation to select the

fields to insert into the message body.



Paperless Merge Fields - Field Explorer

Double click on the **Merge Fields** folder to expand the additional tables available for inserting. The additional fields will be listed as <module_table.fieldname> under the table folders.



Double click on the field to have it inserted into the message body or subject line. When editing is complete, click the **X** in the top right of the **MBA Paperless Merge Fields** screen to close the field explorer. The sample below shows how the additional fields can be added to the body of the message.

<CustomerName>,

Attached is your <Document> #<DocumentNo> for <AR_Customer.CustomerName> that is due on <AR_InvoiceHeader.InvoiceDueDate>.

Please keep this <Document> for your records. If you have any issues, please feel free to call us at 555-365-4575.

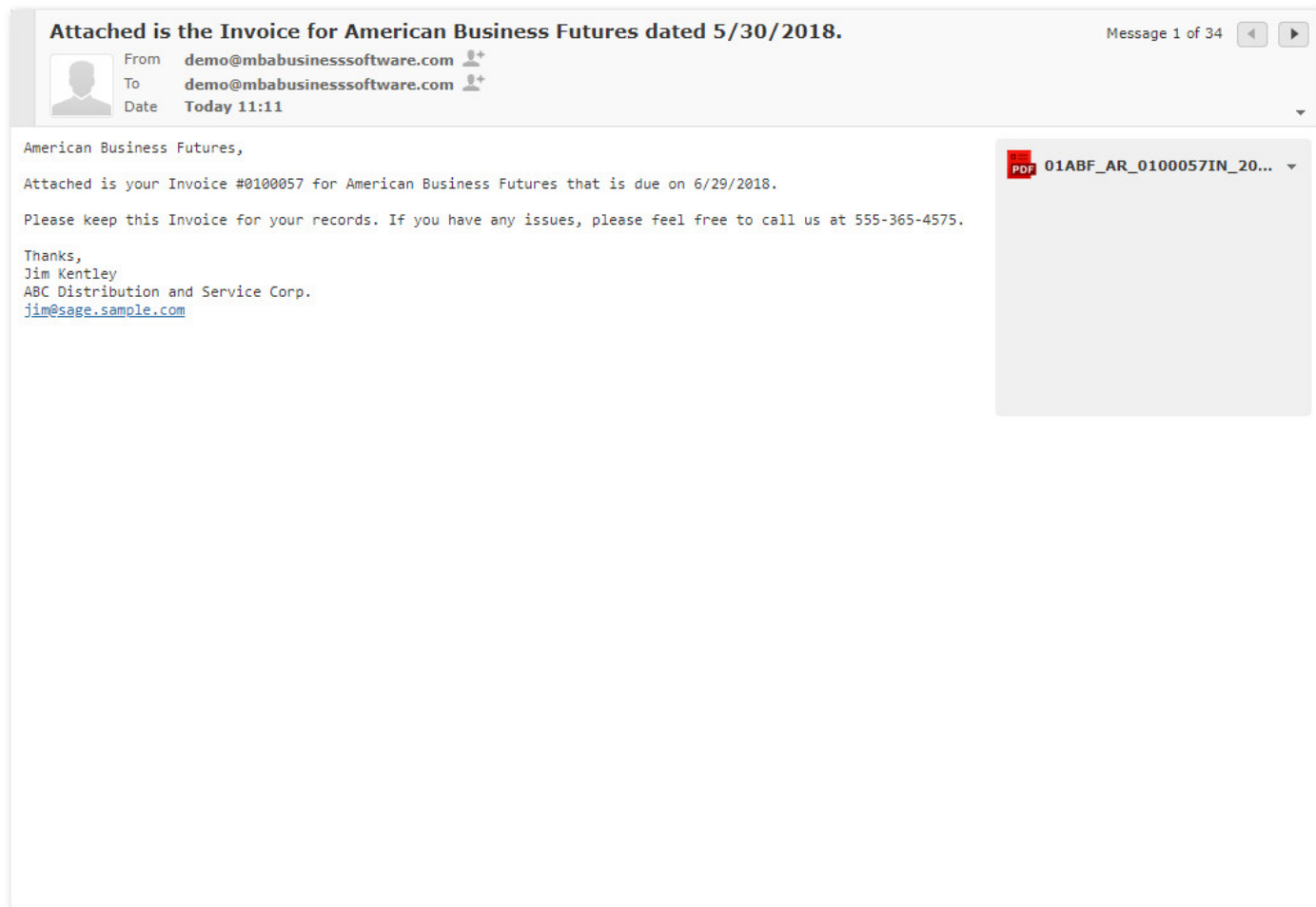
Thanks,

<AR_Salesperson.SalespersonName>

<CompanyName>

<AR_Salesperson.EmailAddress>

When this is sent using Paperless office the fields will be merged as shown below:



Paperless Merge Fields - Example Email

Available Fields

The list of fields available when clicking on the **Field Explorer** in **Electronic Delivery Message Maintenance** is dynamic and built based on the current Document that is selected during entry. A preset list of tables are used for each document selected. This list of tables are used to query the Data Dictionary for the available fields to be listed. Since the Data Dictionary is used to create the list of fields to be merged, this means that User Defined Fields (UDFs) as well as developer fields (if populated in Data Dictionary) will be included.

Document Type	Module Code	Document	Table	Full List	Notes
Customer Forms	S/O	Invoice	AR_Customer		2018 List <CustomerName>
			AR_CustomerPDFLog		<BillToName> <CustomerNo> <Document> <DocumentDate>
			AR_Salesperson		2018 List
			SO_InvoiceHeader		2018 List

Document Type	Module Code	Document	Table	Full List	Notes
			SY_Company		<CompanyName>
Customer Forms	S/O	Order	AR_Customer		2018 List <CustomerName>
			AR_CustomerPDFLog		<BillToName> <CustomerNo> <Document> <DocumentDate>
			AR_Salesperson		2018 List
			SO_SalesOrderHeader		2018 List
			SY_Company		<CompanyName>
Customer Forms	A/R	Invoice	AR_Customer		2018 List <CustomerName>
			AR_CustomerPDFLog		<BillToName> <CustomerNo> <Document> <DocumentDate>
			AR_InvoiceHeader		2018 List
			AR_Salesperson		2018 List
			SY_Company		<CompanyName>

Uninstalling

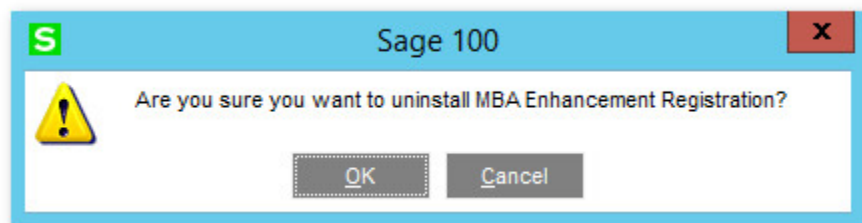
To uninstall an Enhancement, launch the registration program **Modules | Library Master | Utilities | MBA Enhancement Registration**. Select the Enhancement from the grid and press the **Uninstall** button. This will remove the enhancement from the system. A message box will appear stating which enhancement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



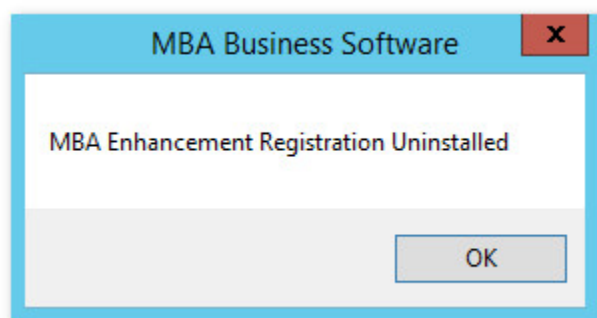
Click on **OK** to uninstall or **Cancel** to go back to the MBA Enhancement Registration without making any change. When an enhancement is removed the check box under **Installed** will be unchecked and the license with expiration date will be removed.

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 Merge Fields are only displayed when the following requirements are met:

1. Enhancement must be installed

2. Enhancement must be registered
3. Document type must be specified

If the document type is 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 Merge Fields	Type	Description
Links\PL_EmailMessage.pvc	Override trigger	Indicates an override exists
Links\PL_EmailMessage_UI.pvc	Override trigger	Indicates an override exists
Links\SY_EmailEngine.pvc	Override trigger	Indicates an override exists
PL\PL106_MRG_EmailMessage.PVC	Class Override	Changes Paperless Email Message
PL\PL106_MRG_EmailMessage_UI.PVC	Class Override	Changes Paperless Email Message UI
PL\PL106_MRG_EmailMessage.M4L	Panel Library	Custom Merge Field 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 Merge Fields 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)
Sage 100 2019 (6.10)
Sage 100 2020 (6.20)

Additional Notes

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

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Where is this Documentation

This document is located at

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

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