ATC

Getting Started

User Manual for the GPAutoPDFInvoices Program

Version 1.3

August 2014

This manual explains how to use the GPAutoPDFInvoices program.

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How do I Install GPAutoPDFInvoices?

Download the .MSI installer and install on the workstation or server you want to run the application on. Once you have ran the GPAPI_INSTALLER.MSI file, you will be prompted for the location you wish to install to. Default is C:\Program Files\Advanced Techcare Inc\GPAutoPDFInvoices. Using My Computer or Windows Explorer, navigate to the destination directory used during installation. In the GPAutoPDFInvoices folder, there is a file named "GPAutoPDFInvoices.xml". Right click this file and select "edit" to make changes to the configuration. Page 2 gives you a break down as to what information each field is looking for. Be sure you save the file with extension .XML when finished editing. ****PLEASE NOTE** The first time you run GPAutoPDFInvoices you need to run with elevated permissions so GPAPI can create the registry entries needed for proper operation. After this you run the application without elevated permissions.**

How do I uninstall GPAutoPDFInvoices?

Add/Remove Programs. Select GPAutoPDFInvoices.

How do I activate GPAutoPDFInvoices?

Figure 1.1
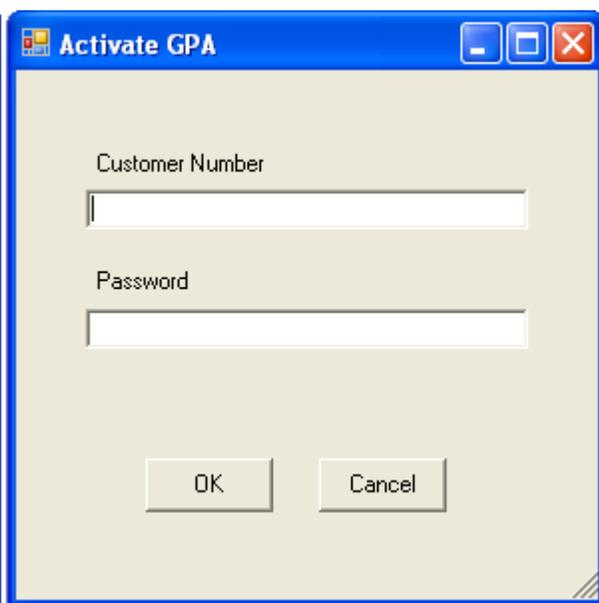
Figure 1.2

When the trial version expires, you will receive the error message displayed in Figure 1.1, once you have activated the software, the error message will no longer be displayed.

If you do not want to wait for the trial to expire to register, just run GPA with a command line parameter of register. (ie."GPAutoPDFInvoices.exe register"). This will force GPAPI into registration mode.

How do I configure GPAutoPDFInvoices?

```xml
<Sample>
  <ConnectionString>Initial
Catalog=GPDB;SERVER=192.168.48.126;UID=John;PWD=JD1342</ConnectionString>
  <UpdConnectionString>Initial
Catalog=GPDB;SERVER=192.168.48.126;UID=John;PWD=JD1342</UpdConnectionString>
  <LogFileName>GPAPI_log</LogFileName>
  <SMTPServer>smtp.craft.com</SMTPServer>
  <SMTPUser>Jim</SMTPUser>
  <SMTPPswd>JR9753</SMTPPswd>
  <SMTPFromEmail> John@craft.com</SMTPFromEmail>
  <MessageBody> You have new Invoices From John, view further info at
http://clients.craft.com </MessageBody>
  <MessageSubject>New Invoices From John</MessageSubject>
  <InvoiceRootDir>\\192.168.48.125\Invoices\Sample\ </InvoiceRootDir>
  <FileAccessUsername>John</FileAccessUsername>
  <FileAccessPassword>JD1342</FileAccessPassword>
  <Sendmail>0</Sendmail>
  <RemitLine1>Craft Inc.</RemitLine1>
  <RemitLine2>John Doe</RemitLine2>
  <RemitLine3>Arlington, TX 76015</RemitLine3>
  <RemitLine4>Phone 817-366-1254</RemitLine4>
  <MsgLine1>
  <MsgLine2>Thank You for Your Business</MsgLine2>

<InvSelectCmd>
SELECT INVCNMBR, CUSTNMBR, CUSTNAME, CSTPONBR, DOCDATE, DUEDATE, DOCAMNT,
SUBTOTAL, TAXAMNT, TRDISAMT, CNTCPRSN, ADDRESS1, CITY, STATE,ZIPCODE,
COMMENT_1, COMMENT_2, COMMENT_3,COMMENT_4, PYMTRMID, SLPRSNID, SHIPMTHD,
FRTAMNT, MISCAMNT FROM IVC30101 WHERE ECTRX = 0 AND VOIDSTTS &lt;&gt; 1 ORDER
BY CUSTNMBR, INVCNMBR
</InvSelectCmd>
<InvUpdateCmd>UPDATE IVC30101 SET ECTRX = 1</InvUpdateCmd>
<InvDtlSelectCmd>
SELECT QUANTITY, XTNDPRCE, UNITPRCE, ITEMDESC, ITEMNMBR, UOFM, MRKDNAMT,
INVCNMBR, DOCTYPE, CMPNTSEQ, LNITMSEQ FROM IVC30102
</InvDtlSelectCmd>
<InvDtlPrintSerials>Y</InvDtlPrintSerials>
<InvDtlStartSerialBox>1</InvDtlStartSerialBox>
<InvDtlSerialCmd>SELECT SERLTNUM FROM SOP10201 </InvDtlSerialCmd>
<SOPSelectCmd>
SELECT SOPNUMBE, CUSTNMBR, CUSTNAME, CSTPONBR, DOCDATE, DUEDATE,DOCAMNT,
SUBTOTAL, TAXAMNT, TRDISAMT, CNTCPRSN, ADDRESS1, CITY, STATE, ZIPCODE,
COMMNTID, COMMNTID, COMMNTID, COMMNTID, PYMTRMID, SLPRSNID, SHIPMTHD,
FRTAMNT, MISCAMNT FROM SOP30200 WHERE ECTRX = 0 AND VOIDSTTS &lt;&gt; 1 AND
SOPTYPE = 3 ORDER BY CUSTNMBR, SOPNUMBE
</SOPSelectCmd>
<SOPUpdateCmd>UPDATE SOP30200 SET ECTRX = 1</SOPUpdateCmd>
<SOPDtlSelectCmd>
SELECT QUANTITY, XTNDPRCE, UNITPRCE, ITEMDESC, ITEMNMBR, UOFM, MRKDNAMT,
SOPNUMBE, SOPTYPE, CMPNTSEQ, LNITMSEQ FROM SOP30300
</SOPDtlSelectCmd>

</Sample>
```

Definition of above commands.

<ConnectionString>
1. Initial Catalog = Database Name.
2. Server = Server IP or FQDN.
3. UID = User ID.
4. PWD = Password.

<UpdConnectionString>
1. Initial Catalog = Database Name.
2. Server = Server IP or FQDN.
3. UID = User ID.
4. PWD = Password.

<LogFileName>
1. LogFileName = Name of file where log entries are added. Please note this defaults to GPAPI_LOG if this entry is blank. The location for this file is the TEMP directory for the User Account that this application runs under in Windows. (ie. Administrator).

<SMTPServer>
1. SMTPServer = Server where mail will be sent through.

<SMTPUser>
1. SMTPUser – Username to log into SMTPServer.

<SMTPPswd>
1. SMTPPswd – Password to log into SMTPServer.

<SMTPFromEmail>
1. SMTPFromEmail = Email address used to send email.

<MessageBody>
1. MessageBody = What you would like the body of the message to say.

<MessageSubject>
1. MessageSubject = Enter the subject of the message.

<InvoiceRootDir>
1. InvoiceRootDir = Enter path to location of where the invoice is stored.

<FileAccessUsername>
1. FileAccessUsername = Enter Username with permissions to access the above invoice.

<FileAccessPassword>
1. FileAccessPassword = Enter Password of above username with permissions to access the invoice.

<Sendmail>
1. Sendmail = obsolete leave set to 0 or 1.

<RemitLine1>
1. RemiteLine1 = Enter the customer name.

<RemitLine2>
1. RemitLine2 = Extra line if needed (below RemiteLine1).

<RemitLine3>
1. RemitLine3 = Enter the City, State and Zip.

<RemitLine4>
1. RemitLine4 = Enter the Phone Number.

<MsgLine1>
1. MsgLine1 = Enter message if needed.

<MsgLine2>
1. MsgLine2 = Enter message if needed.

\<InvSelectCmd\>
   1. Command to pull data for Non-SOP Invoices information.
\<InvUpdateCmd\>
   1. Command to update each Non-SOP Invoice after processing by GPA.
\<InvDtlSelectCmd\>
   1. Command to pull Non-SOP Invoice Detail information.
\<InvDtlPrintSerials\>
   1. Yes or No Flag indicating whether to print Serial Numbers
     for each Detail Line.
\<InvDtlStartSerialBox\>
   1. Starting Box to Print the Serial Numbers for each Detail Line.
     Usually the same box as the Item Description.
\<InvDtlSerialCmd\>
   1. Command to pull serial number data for each detail line.
\<SOPSelectCmd\>
   1. Command to pull SOP Invoices information.
\<SOPUpdateCmd\>
   1. Command to update each SOP Invoice after processing by GPA.
\<SOPDtlSelectCmd\>
   1. Command to pull SOP Invoice Detail information.

What new features are in Version 1.3?

GPAPI now supports automatically building invoices from Invoice Entry or Sales Order Invoicing. You do not need to worry about which module and function you use to build your invoices. GPAPI will automatically look at all the invoicing tables and process any non-void SOP and Non-SOP invoices.

GPAPI now supports printing invoice comments for each invoice regardless of function used to build the invoice.

GPAPI now supports printing serial numbers for any serialized inventory items entered onto any invoice.

Can the Invoice Format be modified?

Only Authorized Partners and ATC are authorized to edit the Invoice Format. Without proper training it is easy to corrupt the Invoice Format.

Why are there files located in the template folder?

These files are the 4 default templates that ATC has already created to support Great Plains Invoicing Formats. A is for Service Invoicing, B and C are for Product Invoicing. D is a hybrid of available for Service and Product Invoicing. You can copy one of these templates and use it instead of the default invoice format. Currently D is the default format.

How do I modify the Invoice Format?

ATC recommends that you contract with your Authorized Partner or contract with ATC directly to help with modifications to the Invoice Format. ATC does not support customers modifying the invoice format directly.

Methods of Running GPAutoPDFInvoices?

You can run GPAPI manually or schedule it with Task Scheduler.

How do I schedule GPAutoPDFInvoices to run automatically?

Open Task Scheduler and create a new task. Select the executable for GPAPI and specify the times you want GPAPI to run. ATC recommends that you run GPAPI at least once a day or specifically every hour. Please be aware that no Invoice Posting should be done at the same time GPAPI is running.