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Customising Forms

Forms Designer Capabilities

Before we start working with the forms designer, you need to understand what it can do. Pastel's forms designer has advanced and unique features which make designing and editing forms a simple procedure.

More:

What Forms Can You Work With?

What Can the Forms Designer Do?

What Forms Can You Work With?

You can use the forms designer on the following forms:

- **Customer documents** Invoices, credit notes, supporting documents such as delivery notes, statements, and labels.

- **Supplier documents** Supplier invoices, returns to suppliers, remittances, and labels.

- **Inventory** Inventory labels.

Pastel's standard printing of these documents use the same form files which you create or edit. You can therefore take the standard layouts and make adjustments to them.

What Can the Forms Designer Do?

The forms designer gives you access to different types of *objects* which you can manipulate on your forms (by forms, we mean invoices, statements, labels, and so on):

• **Text**   You can type in text and place it on a form.

• **Database**   Depending on the form, you can select fields from the database. These can be master file fields such as the customer's name, or line item fields such as the quantity. You can access additional fields besides the ones which display on the standard forms.

• **Boxes and Lines**   You can create boxes, horizontal lines, and vertical lines. You can put other objects inside boxes.

• **Pictures**   You can insert bitmaps into your form. You could use this, for example, for your company logo.

• **Bar Codes**   On inventory labels, you can insert bar codes. You can choose the type of bar code as well as other bar code parameters.

Each of these objects have their own *properties.* For example, a text object's properties include the actual text which displays, as well as its font and alignment. As another example, lines can have line styles.

Pastel also gives you the ability to align groups of objects at once.   To do this, you first select an object as a primary object. Then, you select other secondary objects. Finally, you align all the secondary objects vertically or horizontally to the primary object.

Form Files

The format of customisable documents are held in form files. Pastel's Forms Designer opens a form file and lets you edit the layout on the screen using drag and drop facilities. You can see how the document will look, and you can preview the document.

More:

Form File Names

Saving Customised Files

Form File Names

Form file names all have an ENG extension. The format of the file name is:

NNNNNPS.ENG

where:

- **NNNNN** is the file name
- **P** is the paper type
- **S** is the paper style.

Here are tables of these values:

File Name - NNNNN above

These are the default file names:

Name	Meaning
CSDO	Customer invoices, credit notes
C	Supplier invoices, returns
CSMTH	Customer statements and supplier remittances

However, you can *create* additional files with other names. Pastel recognises the following additional names:

Document Name	Supporting Name	Meaning
CSTMR	CDELV	Customer invoices, credit notes
CINVC	CINVD	Customer invoice
CCRDN	CCRDD	Customer credit note
SUPPL	SUPPD	Supplier invoices, returns
SINVC	SINVD	Supplier invoices
SRETN	SRETD	Supplier returns
CSTAT	does not apply	Customer statements
SREMT	does not apply	Supplier remittances

The additional file names let you create different layouts for each type of document you use, or different formats for customer documents as opposed to supplier documents. The standard documents share one common layout for all customer sales and supplier purchase documents, and one layout for customer statements and supplier remittances.

Paper Type - P Above

Letter	Meaning
C	Continuous paper (for dot-matrix printers)
S	Single sheet paper (for laser, bubble, and ink jet printers)

Paper Style - S Above

Letter	Meaning
P	Plain paper
R	Pre-printed paper, which you can purchase from Pastel or

authorised re-sellers

H	Header pre-printed, which is pre-printed paper which also has your logo printed

Some examples of form file names are:

Name	Meaning
CSDOCCR.ENG	Customer / supplier documents (CSDOC) which print on continuous (C) pre-printed paper (R)
CSDOCSP.ENG	Customer / supplier documents (CSDOC) which print on single sheet (S) plain (P) paper
CSMTHCH.ENG	Customer statements and supplier remittances (CSMTH) which print on continuous paper (C) which is pre-printed and which contains your logo (H)

Saving Customised Files

When you change a form or design a new form, you always save it in *another* file. Here is an important rule:

You should *never* change the original form files. If you do, and you install an update of Pastel, your changes will be lost.

To make a customised form

1. In the forms designer, open the standard form file you wish to customise, or start a new form.

2. Save the format to a new file. The extension of the new file name should be like the file you opened, except that the last letter of the extension is "Z". For example, in English language versions, the extension is "ENZ" instead of "ENG". (We will use English files throughout as an example.)

3. If you wish to create a form file which fills the same function as the original file, use the same file name. For example, to customise pre-printed single sheet customer statements and remittances, open CSMTHSR.ENG, and save it as CSMTHSR.ENZ.
   On the other hand, if you wish to create a customised form for customer statements only, then open CSMTHSR.ENG, and save it as CSTATSR.ENZ.

More:

Search Sequence for Form Files

Search Sequence for Form Files

When Pastel prints a document, it loads the form file from disk. In order to allow full flexibility, Pastel looks for the form file in a certain sequence. This sequence allows you to customise forms at different levels. The search sequence is as follows:

1. Pastel first searches the directory of the company you are working in for an applicable form file with the extension "ENZ".

2. If the file is not there, Pastel searches its own directory for an applicable form file with an "ENZ" extension.

3. If this file is not found, Pastel uses its own file, i.e. the "ENG" file in the Pastel directory.

By "applicable   form file", we mean that Pastel looks first for additional file names as specified in the table earlier. Pastel works from the lowest level upward. For example, assume that you are printing an invoice, and that you are using single sheet pre-printed paper. Pastel searches in the following sequence:

File Name	Directory	Meaning
CINVCSR.ENZ	Company	An invoice customised for this company only.
CSTMRSR.ENZ	Company	A format, customised for this company only, used for invoices and credit notes.
CSDOCSR.ENZ	Company	A format, customised for this company only, used for all customer and supplier documents.
CINVCSR.ENZ	Pastel	An invoice customised for all companies.
CSTMRSR.ENZ	Pastel	A format used for invoices and credit notes in all companies.
CSDOCSR.ENZ	Pastel	A format used for all customer and supplier documents in all companies.
CSDOCSR.ENG	Pastel	The default format which ships with Pastel, which does not require customisation.

Pastel applies the search sequence described above separately for each form. You therefore only have to create those form files you need to change and not the rest.

Creating and Editing Forms

Controlling Fonts on Forms

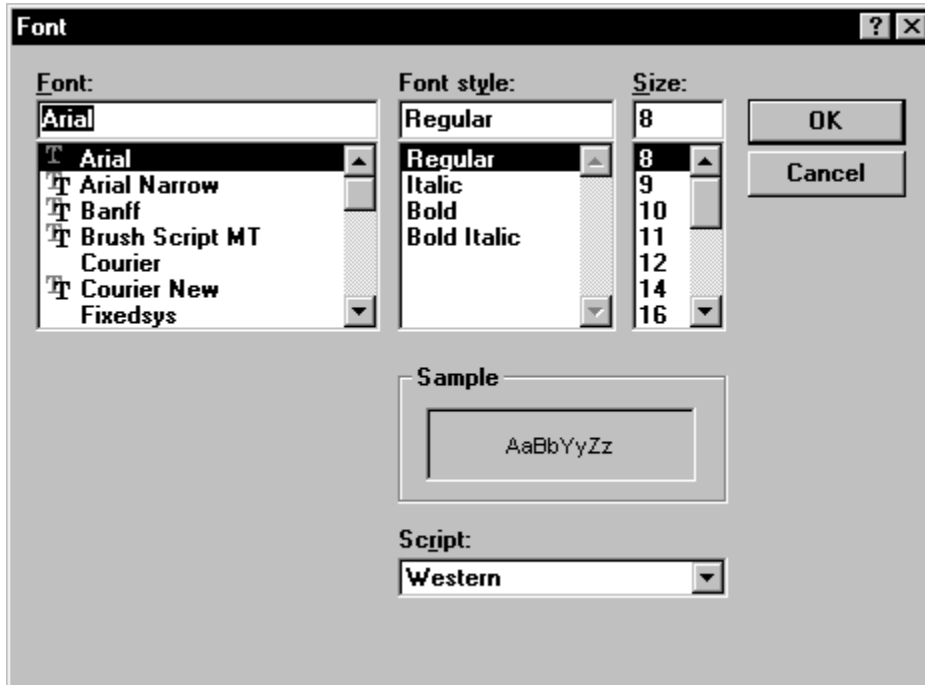The font you print with is a critical element of the forms design process. Each font has its own *font name.* Fonts can also have different *sizes* and *styles*. You set fonts in Windows'™ Font setup dialog box:

Note that two different fonts (for example Arial and Courier) with the same font size (for example 8) use a different amount of space. The font style, such as regular or bold) also affects the amount of space.

More:

Screen and Printer Font Mismatches

Where Can You Set Fonts?

Setting Up Fonts for a Form

Screen and Printer Font Mismatches

To provide you with an on-screen forms designer, we also have another problem to face: we cannot, on the screen, always show the exact same spacing as on the printer. The issue is fraught with technicalities which we will not go into here. One simple issue is that you may use a printer font which does not have a matching screen font.

We overcome this problem by allowing you to print the form layout at any time.

Note   Only by printing on the actual printer you will be printing the documents on, can you confirm that the spacing is correct.

You access the print option by either clicking the Print button on the icon bar, or by choosing the File...Print Preview menu option.

Where Can You Set Fonts?

Pastel gives you maximum flexibility when setting up fonts:

• You can set a font for each individual object on a form

• You can set fonts for a form as a whole

• You can set fonts from within Pastel SOHO Accounting. If you do this, you do not have to use the forms designer for setting fonts.

Pastel applies these fonts in the sequence above, with the first method being the strongest. In other words:

• If any object has its own font, Pastel always uses it.

• If an object does not have its own font, but the form has a font, Pastel uses the form's font.

• If neither the object nor the form has a font, Pastel uses the font you set up in the accounting program, in the File...Printer/Fonts menu option.

We will see later how to set an object's font individually.

Setting Up Fonts for a Form

The standard forms which ship with Pastel contain no form-level or object-level fonts. They will therefore use the fonts which you set up in the SOHO Accounting program, in the File...Printer/Fonts setup menu. We refer to forms which have no fonts in them as being in *dynamic fonts mode.*

However, when you customise a form in the forms designer, Pastel needs to know which font you will be using. Without this, Pastel does not know how much space each object will take. Therefore, when you load a standard form into the forms designer, Pastel asks for form-level fonts:
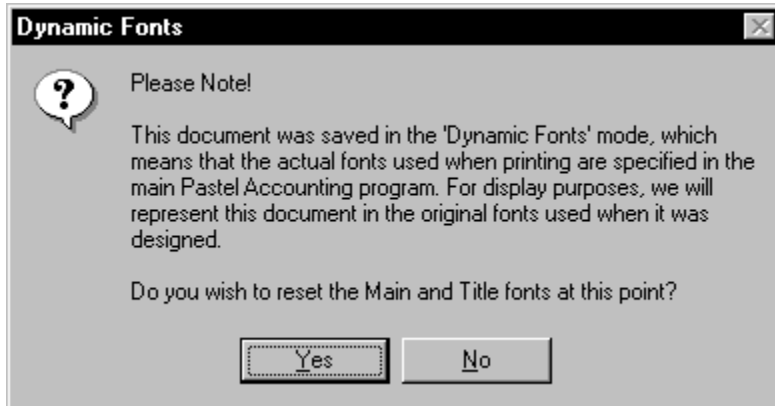
To set up a default font for a form, use the File...Printer/Fonts Setup menu option in the forms designer:
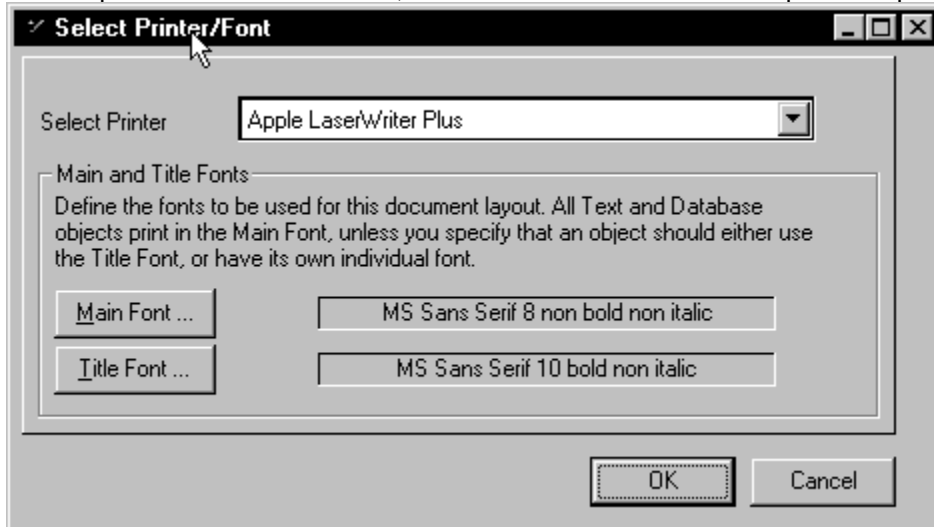
Select the printer you will be printing on, and then select the font by clicking the Default Font button. As in the Accounting option, the Title Font is for the form name (for example, "Invoice") and the Main font is for the rest of the document.
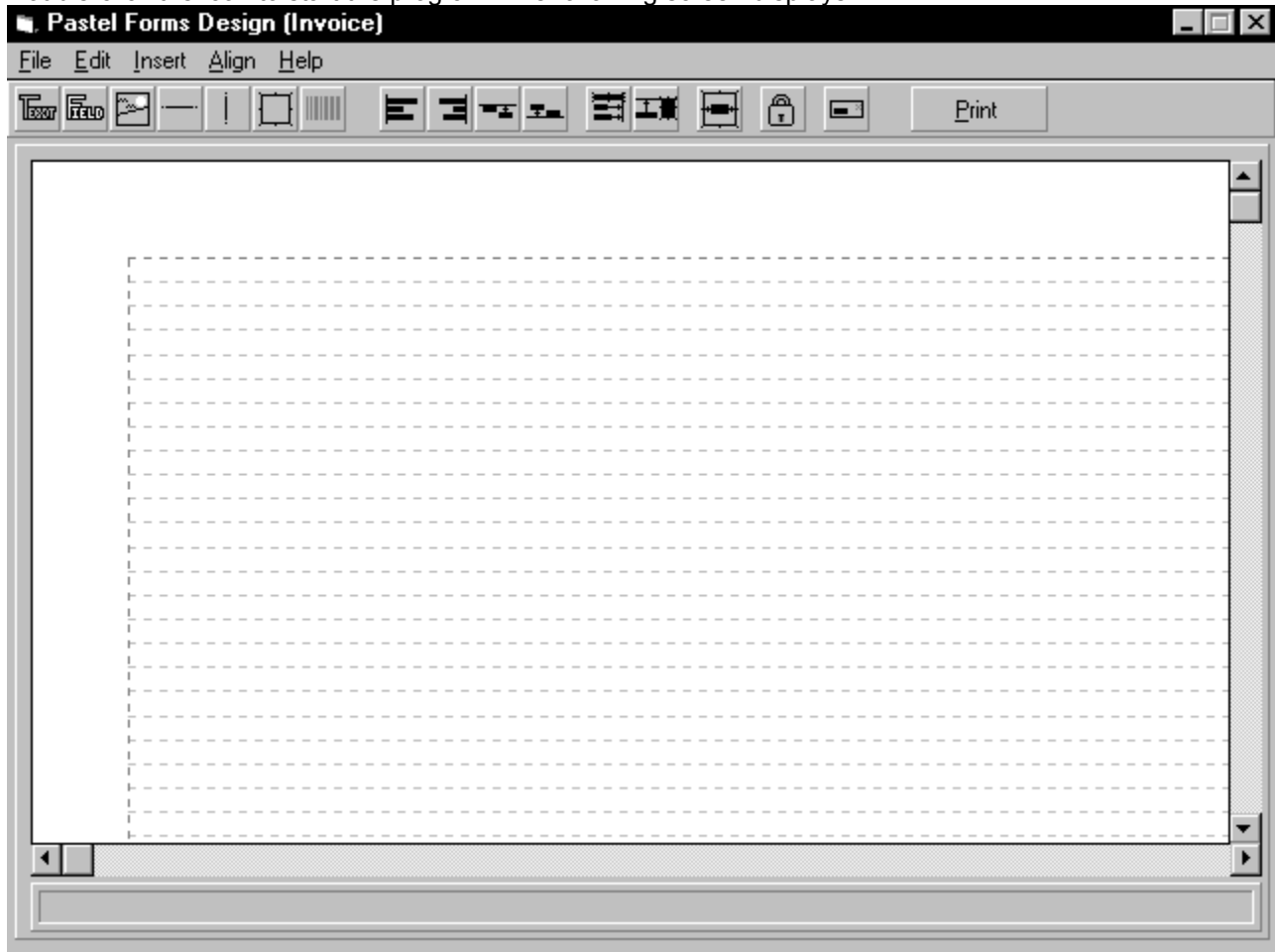
Remember that you can change each object's font individually after you set these form-level fonts.

Starting the Forms Designer

You customise forms by running the Customise Forms program from the Pastel group. The icon looks like this:

Double-click the icon to start the program. The following screen displays:

The screen is divided into different areas:

- **Menus**   You use menus to open forms, insert/delete objects, pictures, etc.

- **Icon Bar**   The icon bar gives you an alternate access to many design facilities. Each icon has its equivalent menu option. If you leave the mouse cursor on an icon for a few moments, Pastel displays a tooltip which explains what the icon does.

- **Work Area**   In the work area you see the form layout, and you can move objects around.

- **Status Bar**   The status bar shows the name of database objects, and the text of text objects, as you move over them with the mouse cursor.

More:

The Icon Bar

The icon bar gives you quick access to the design elements:

Remember that you can confirm an icon's function simply by leaving the mouse cursor over it for a few minutes.

Loading a Form Into the Forms Designer

Before you can customise a form, you must load it into the Forms Designer or create a new form. You then need to save the form. If you have loaded a standard Pastel form, you also need to change its name at the same time.

Most of the time, you should load an existing form. Even if you are going to change a form's layout dramatically, it is probably still better to start with an initial existing form. This prevents you leaving essential information off the form.
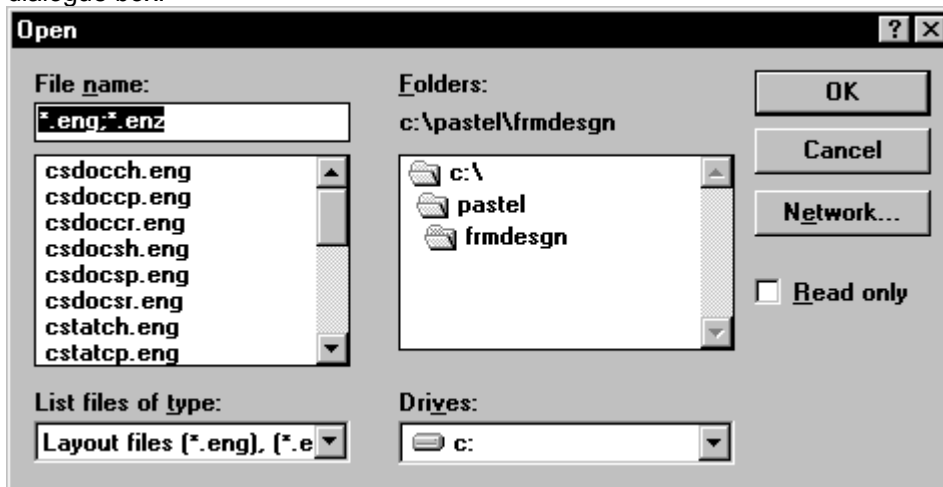
To create a new form

1. Choose the File...New menu.

2. In the sub-menu, choose the type of form you are creating:

Invoice
Statement
Customer/Supplier Label
Inventory Label
Cheque
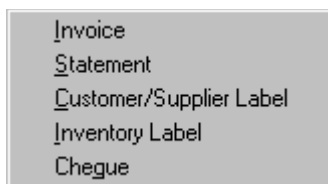
The choice you make determines which types of database object fields Pastel makes available to you, and is therefore very important.

To load an existing form

1. Choose the File...Open menu option. Pastel displays the standard Microsoft® Windows™ File Open dialogue box:

Open

File name:
.eng;.enz

csdocch.eng
csdoccp.eng
csdoccr.eng
csdocsh.eng
csdocsp.eng
csdocsr.eng
cstatch.eng
cstatcp.eng

List files of type:
Layout files (*.eng), (*.e

Folders:
c:\pastel\frmdesgn

c:\
pastel
frmdesgn

Drives:
c:

OK
Cancel
Network...
☐ Read only

2.   Select the file you require. Remember that you may have saved the file in a company's directory in order to customise for that company only.

Note   If you create a new form, or if you open an existing standard form, Pastel will ask you to choose fonts. It is vital that you choose the fonts you print the forms with. If you do not, the spacing of the objects will not be correct.

Saving a Form

Once you change the form, you need to save your changes. You save form files with either the File...Save or the File...Save As menu options. Both use the standard Microsoft® Windows™ Save File dialogue box:
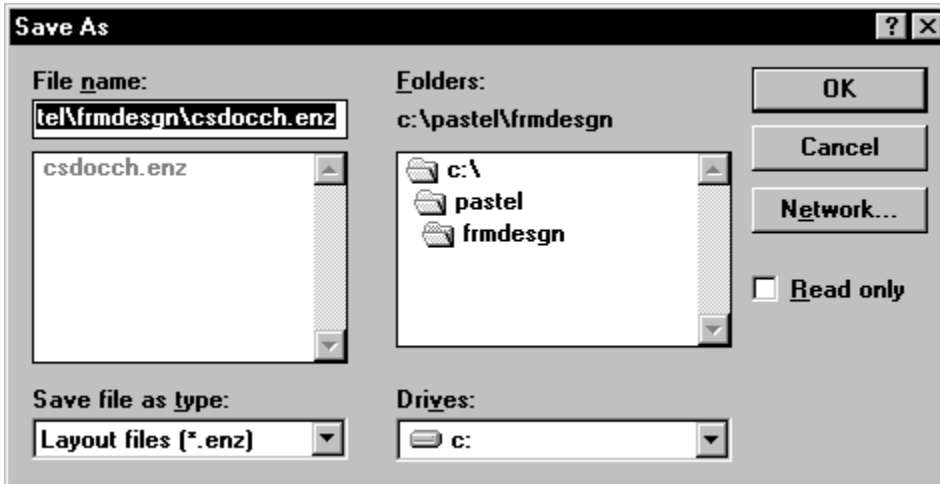
If you are saving a new form, both these options ask for the file name. If you are saving an existing file, the File...Save option saves without asking for a file name, unless the name has Pastel's standard .ENG extension (you cannot save a file with a .ENG extension.

When you save a form, Pastel asks whether to save the form-level fonts in the form:
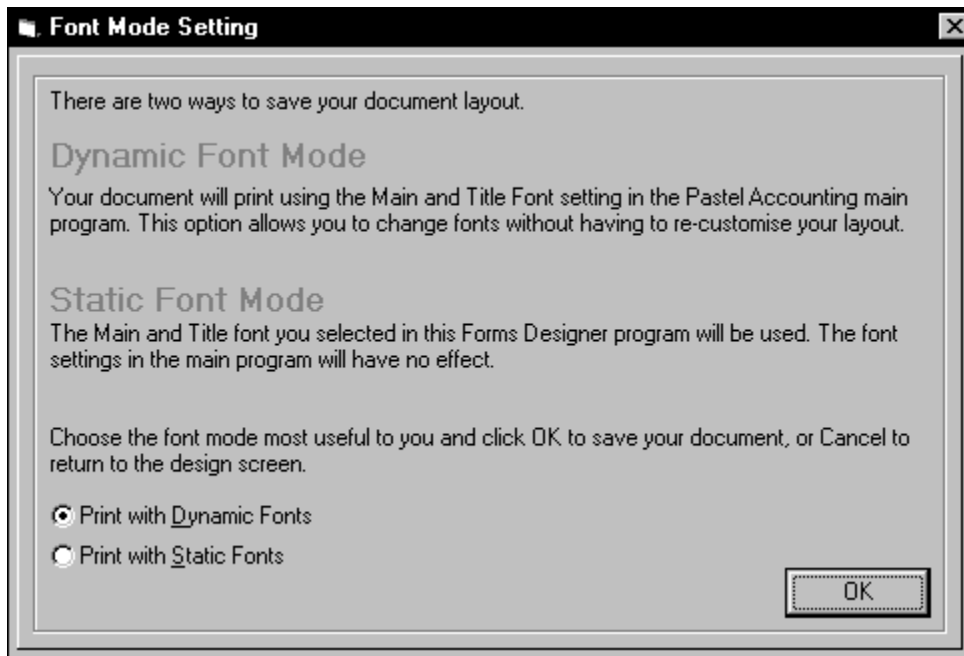
You should respond as follows:

- If you will always print the document with the same font, choose Static Mode.

- If you are going to print the document on different printers, choose Dynamic Mode. You can then choose the font to print with in the accounting program.

Note   This setting does not affect fonts you set per object. Pastel will always use an object's font if you

set it up.

Working on the Forms Designer and Pastel SOHO Accounting

You can customise your forms while Pastel SOHO Accounting is also running. However, if you save your form, you should be aware that Pastel loads the form file each time it prints a document, even if you print in batch mode.

If you are preparing a form file for use, and someone else is processing in Pastel, save the form to a file with a name which Pastel will not recognise. Once the customisation is ready, you can copy the file to the correct file name.

Make Backup Copies of Your Forms

Pastel's backup routines will back up forms which you store in company directories. However, customised forms which are in Pastel's program directory are not backed up. You should make security copies of these files from time to time.

Setting Page Layout Properties

Each type of form has its own page properties for your form. You set or edit these in the File...Page Layout menu option.

More:

Units of Measurement

Statement / Remittance Page Layout

Invoice / Credits / Returns Page Layout

Labels Page Layout Properties
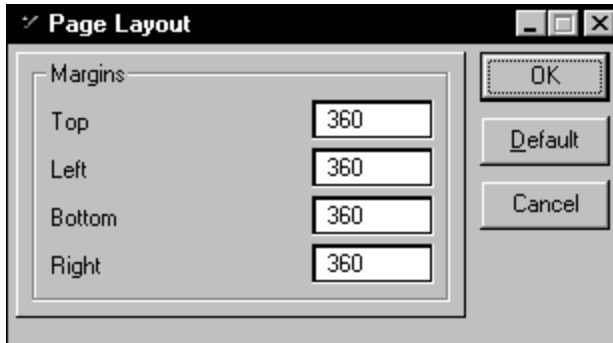
Cheques Page Layout Properties

Units of Measurement

When you set page layout properties, you enter many spacing values. You enter these values in units called *twips.* To calculate these, use the following table:

Unit	Twips per Unit
Centimetres	567 twips per centimetre
Inches	1440 twips per inch

For example, to leave a .25-inch margin, enter a value of 360, which is 1440/4.

Statement / Remittance Page Layout

In the margins frame, enter the margins (in twips) within which Pastel must print on the physical page. You can set the margins to be the same as Pastel's default margins by clicking the Default button.

Invoice / Credits / Returns Page Layout

```
Page Layout                        [_][□][X]

┌─ Margins ──────────────────┐   ┌──────────┐
│                            │   │    OK    │
│  Top         [ 360 ]       │   └──────────┘
│                            │   ┌──────────┐
│  Left        [ 360 ]       │   │ Default  │
│                            │   └──────────┘
│  Bottom      [ 360 ]       │   ┌──────────┐
│                            │   │  Cancel  │
│  Right       [ 360 ]       │   └──────────┘
│                            │
└────────────────────────────┘

┌─ Inclusive/Exclusive ──────┐
│                            │
│  Inclusive   [Inclusive  ] │
│                            │
│  Exclusive   [Exclusive  ] │
│                            │
└────────────────────────────┘
```

In the margins frame, enter the margins (in twips) within which Pastel must print on the physical page. You can set the margins to be the same as Pastel's default margins by clicking the Default button. When you print invoices, you choose whether to print in exclusive or inclusive mode. Pastel uses a database object field called ZINEX to print an appropriate description such as the word "Inclusive" or "Exclusive" depending on your choice. If you wish to use alternative wording, enter the wording in the Exclusive / Inclusive frame.

To set the values on this screen to Pastel's default values, click the Default button.

Labels Page Layout Properties

Customer/Supplier Label Layout

Label Dimensions

Label Width	3,005
Label Height	1,474
Labels Across	3
Labels Down	10
Vertical Gap Between Labels	0
Horizontal Gap Between Labels	300
Top Margin	454
Left Margin	500

OK
Default
Cancel

All the values in this screen, except for the number of labels fields, are in twips.
Pastel previews the label layout in the picture. If you change any values on the screen, Pastel re-draws the preview picture.
To set the values on this screen to Pastel's default values, click the Default button.

Cheques Page Layout Properties

Cheque Layout

Cheque Dimensions and Properties

Cheque Width	11,300
Cheque Height	3,000
Cheques Across	1
Cheques Down	4
Vertical Gap Between Cheques	500
Horizontal Gap Between Cheques	0
Top Margin	360
Left Margin	360
Maximum Printable Value	9,999,999

OK

Default

Cancel

Pastel previews the cheque layout in the picture. If you change any values on the screen, Pastel re-draws the preview picture.

The Maximum Printable Value field lets you prevent Pastel printing cheques which are over the limit you send.

Note as well, that you cannot print a cheque value if you do not insert the database object for that value. For example, if you leave off the Millions database object, you cannot print cheques greater than 999,999.99

To set the values on this screen to Pastel's default values, click the Default button.

Working in the Forms Designer

In the work area, Pastel displays the form layout. Here is a typical work area:
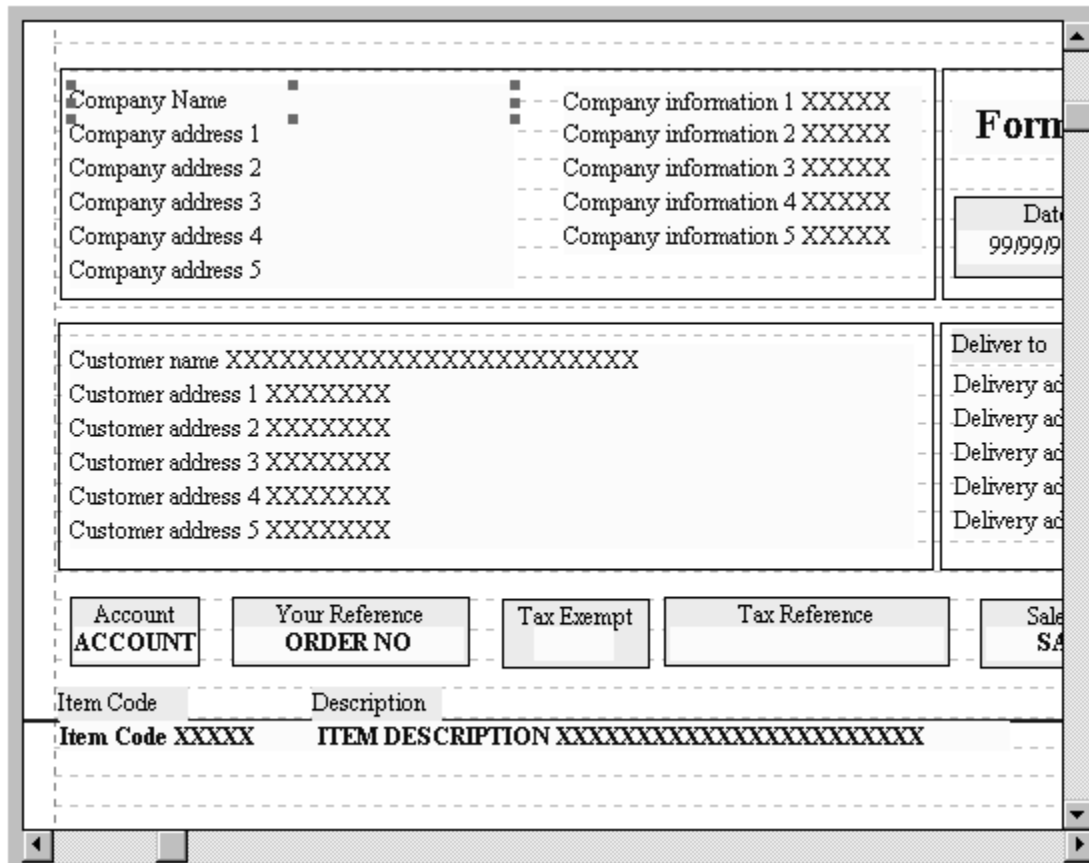
- **Database Objects**   These display with a yellow background. Pastel displays each field name, and then fills the field with X characters to the maximum width of the field.

- **Text Objects**   These display as you enter them. They include text and line characters. These display with a light blue background.

- **Boxes**   You can draw lines and boxes, and adjust their thickness and shape.

- **Selection Handles**   You select an object by clicking on it. Pastel places a selection handle around the object. You can then move, delete, copy or resize the object.

- **Horizontal Gridlines**   The horizontal gridlines show standard line boundaries. You can set Pastel to automatically align new database and text objects to the gridlines. To do this, choose the Align...To Row menu option. Note that pictures, lines and boxes do not align automatically.

- **Lines Area**   The area where the document lines display is bordered by two dark blue lines. You can move these lines to suit the document. The forms designer only displays objects in the first line of the lines area.

More:

Setting the Lines Area

Selecting Objects

Setting the Lines Area

All the documents which you can customise in the forms designer, with the exception of labels, usually have three separate areas:

- A header area where you show company, customer, and supplier information, and any headings for the detail lines.

- A detail area where you display lines such as invoice or statement lines. Each line is the same, and you only specify one line.

- A footer area where you show totals and messages.

Pastel shows the lines area as being between two blue lines on the form. You can adjust the number of lines which display on the form by moving either of the blue lines.

To move the lines area on a form

1. Move the mouse onto the blue line at the top or the bottom of the lines area. Pastel changes the cursor to a vertical sizing arrow:

Item Code XXXXX	ITEM DESCRIPTION	9,999.00

2. Click the mouse and keep the mouse button down. Move the mouse cursor to move the line. As you do so, Pastel tells you how many lines can fit in the space you leave:

Item Code XXXXX	ITEM DESCRIPTION	9,999.00

11 detail lines

3. Release the mouse button to complete the operation.

Selecting Objects

You select objects simply by clicking on them. Pastel then places selection handles around the object.

As we will see later, you can select multiple objects at one time, and then manipulate them as a group.

More:

De-Selecting Objects

Selecting Box Objects

De-Selecting Objects

You de-select an object in one of two ways:

- By selecting another object

- By clicking anywhere on the form where there are no objects.

Selecting Box Objects

The box object is a container - it will normally have other objects inside it, including, perhaps, other boxes.

You may have difficulty selecting an object in a box if the box is already selected. If this is the case, simply de-select the box by clicking on an empty area of the form, and then select the object you require afterwards.

If this still does not work, then you must send the outer box to the back. We discuss this a little later, when we deal with overlapping objects.

Another aspect of this is that if you need to select a box, and another box is already selected, you must first de-select the first box. To do this, click anywhere on the form.

Locking Objects

As you move around a form, you may accidentally select and move an object. To prevent this, you can lock an object in place.

To lock/unlock an object

1. Select the object. If the selection handles are pink, the object is locked. If the selection handles are blue, the object is unlocked.

2. To toggle the lock, click the Lock icon in the toolbar, or choose the Align... Lock/Unlock menu option.

3. The selection handles change colour to confirm its new status.

Note   Locking an object ONLY prevents you from selecting and moving it. You can change a locked object's properties, and you can also align a locked object, which will in fact move it.

Moving Objects

You can move existing or new objects anywhere on the form.

To select and move an object

1. Make sure that the object you are moving is unlocked.

2. Click anywhere on the object and hold the left mouse button down. Pastel places selection handles around it. Move the object to its correct position. This is called *dragging* the object.

3. Once the object is in the correct position, release the mouse button.

Scrolling Through the Work Area

Except for labels, Pastel cannot fit a whole form on the screen at once. The Work Area only shows a part of the form at one time.

You can use the scroll bars to move you to different parts of the form.

However, if you are moving an object around on a form, you cannot access the scroll bars, since the object you are moving is controlled by the mouse.

So, in this circumstance of moving an object, if you place the mouse cursor on the extreme edge of the Work Area, and leave the mouse there momentarily, *Pastel scrolls automatically in that direction.*

Inserting New Objects Into a Form

You insert new objects either by clicking on the appropriate icon, or by selecting an option in the Insert menu. Your choices are:

- Text
- Database
- Picture
- Bar Code
- Horizontal Line
- Vertical Line
- Box.

To insert an object

1. Select the object to insert. You can do this by choosing the option on the icon bar, or by selecting the object in the Insert menu.
2. For database objects, choose the field you require. For text objects, enter the text you require.
3. Pastel places the object in the centre of the screen and selects it. Move it by moving the mouse.
4. Once the object is in the correct position, release it by clicking the mouse.

Overlapping Objects

When you insert or move objects, Pastel lets you place one on top of another. Sometimes this is quite natural. For example, you may insert a box, and then insert a text object and a database object on top of the box.

Other times, you may overlap objects because you do not expect that they will interfere with each other - for example, the database object on the left should never be long enough to interfere with the database object on the right.

However, when you design a form, you always try to cater for exceptional circumstances, no matter how unlikely they may seem. In this case of overlapping objects, you can adopt two approaches:

- You can make the objects smaller, so that they do not overlap. We see how to do this in the next section.

- You can control which object has preference in an overlapping situation, by specifying which object is on top of the other.

To control which objects are on top of other objects

1. Select one of the objects which are involved.

2. To put it on top, choose the Edit...Bring to Front menu option, or press <CTRL>+F.

3. To put it behind, choose the Edit...Send to Back menu option, or press <CTRL>+B.

Changing an Object's Size

When you insert an object in a form, Pastel sets its size. For database objects, Pastel sets it so that, using the current font, most values should fit. However, there are many reasons why you may want to change the object's size:

- You may be using relatively small descriptions or values, and so need less space

- You may change fonts, and so need more or less space

- You may change the size of paper, and so have more or less space.

Note   Pastel sizes pictures automatically; you cannot change the size of a picture object.

To change the size of   an object

1. Select the object.

2. Move onto one of the blocks of the selection handle:

   As you do so, the mouse cursor changes style to show the type of operation you want to perform.

3.   With the mouse cursor changed, click the button and drag the object to the size you want.
4.   Release the mouse button to complete the operation.

Note   If an object's selection handle is over another object, you may not be able to grab a sizing handle. In this case, move the object to a blank area of the form, resize it, and then move it back.

More:

Sizing Text Objects

Sizing Text Objects

If you create a text object, you can only resize it vertically. Pastel sets the horizontal size of the object to match the text you enter. The text may look as if the space that Pastel allocates to it is too large. However, this is not the case. Pastel sizes the text object to fit when printing on the printer. On the screen, it may look incorrect.

Setting Object Properties

We have already said that each object has properties. You can access and edit these properties.

To access an object's properties

1. Select the object.

2. Right-click with the mouse or select the Edit...Properties menu option.

Each type of object has its own properties. We look at each one in detail:
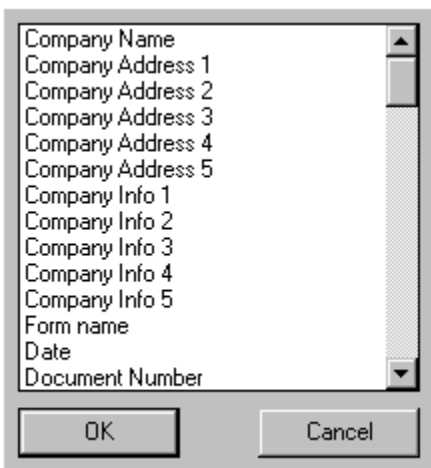
More:

Text / Database Object
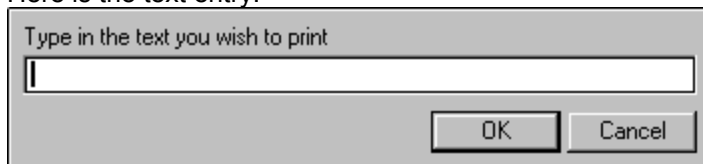
Picture

Bar Code

Boxes / Lines

Text / Database Object

As soon as you select one of these objects, Pastel asks you to select a field or type in text. Here is the database field selection:

```
Company Name
Company Address 1
Company Address 2
Company Address 3
Company Address 4
Company Address 5
Company Info 1
Company Info 2
Company Info 3
Company Info 4
Company Info 5
Form name
Date
Document Number
```

    OK   Cancel

Select a field to insert.
Here is the text entry:

```
Type in the text you wish to print
[                                  ]
                    OK      Cancel
```

Enter the text you require for the field.
When you right-click on a database or text object, Pastel displays a property menu:

```
        Text

✔   Main Font
    Title Font
    Individual Font

✔   Left Justify
    Right Justify
    Centre

    Print With Border
```

The first menu option is different for text and database objects. For database objects, the menu shows Database as the first option instead of Text.

Text / Database

This returns you to the windows we have just seen.

Fonts

This lets you change the font for the object. If you select Main Font or Title Font, Pastel will use the form-level font you set up in the File...Printer/Fonts setup menu option.

If you wish to use a font specifically for this object, choose Individual Font. Pastel displays the standard Windows™ font selection dialog box, and you can choose a font.

Left Justify / Right Justify / Centre

Specify whether the object's contents should align on the left, the right, or the centre. As a general rule, align text to the left, numbers to the right, and dates in the centre.

Print With Border

This places a border around the object. It is a shortcut to drawing a box and then placing the object inside the rectangle.

In addition, you can use this border facility with a text object to include a database object. For example:

```
Document No
Doc No XXX
```
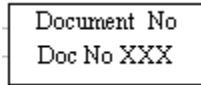
This looks like three objects:

- A box

- A text object called Document No

- A database object called Doc No.

You can draw the above using three objects, but there is a simpler way to do it with only two objects - the text object and the database field object.

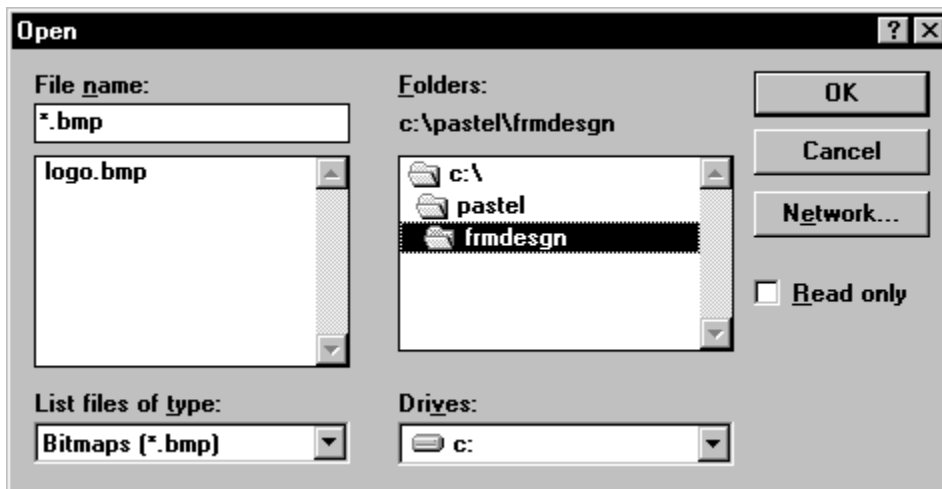**To create a boxed text heading and a database object**

1. Create a text object and enter its text - in this case "Document No"

2. If the object is not selected, then select it. Right-click. The Property Menu displays. Choose Centre.

3. Right-click again, and choose Print With Border.

4. Click on the bottom middle selection handle to re-size the text object.

5. Expand the box downwards until it can hold the database object.

6. Insert a database object, and position it under the words "Document No", but in the borders of the box created by the text object.

7. Set the database object to Centre as well.

Fonts for the Detail Area

In the detail or lines area of the document, Pastel always uses the Main font. You cannot mix fonts in the detail lines area.

Picture

The picture property is simply the name of the bitmap file. Pastel displays the standard Windows™ File...Open dialog box:

```
┌─────────────────────────────────────────────────────────────────┐
│ Open                                                      ? X     │
├─────────────────────────────────────────────────────────────────┤
│  File name:                  Folders:                             │
│  ┌──────────────────────┐    c:\pastel\frmdesgn      ┌──────────┐ │
│  │ *.bmp                │                            │   OK     │ │
│  └──────────────────────┘                            └──────────┘ │
│  ┌────────────────────┬─┐   ┌────────────────────┬─┐ ┌──────────┐ │
│  │ logo.bmp           │▲│   │ 📁 c:\            │▲│ │  Cancel  │ │
│  │                    │ │   │  📁 pastel        │ │ └──────────┘ │
│  │                    │ │   │   📁 frmdesgn     │ │ ┌──────────┐ │
│  │                    │ │   │                    │ │ │ Network..│ │
│  │                    │ │   │                    │ │ └──────────┘ │
│  │                    │ │   │                    │ │              │
│  │                    │▼│   │                    │▼│ ☐ Read only  │
│  └────────────────────┴─┘   └────────────────────┴─┘              │
│  List files of type:        Drives:                               │
│  ┌──────────────────┬─┐     ┌──────────────────┬─┐                │
│  │ Bitmaps [*.bmp]  │▼│     │ 💾 c:            │▼│                │
│  └──────────────────┴─┘     └──────────────────┴─┘                │
└─────────────────────────────────────────────────────────────────┘
```
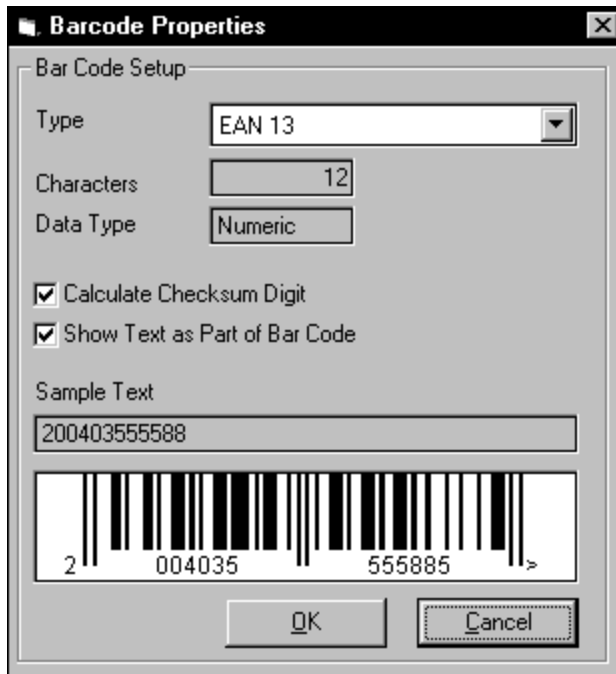
Choose a bitmap to load into the form.

Pastel does not store the actual bitmap in the form file. You must ensure that Pastel can find the bitmap when it prints the form. The rules are as follows:

In the Forms Design program, Pastel will first look for the bitmap in the directory from which you originally load the bitmap. If it is not there, Pastel looks in the directory where the form is loaded from.

When Pastel prints the document, the sequence is reversed. Pastel will first look for the bitmap in the directory where the form is loaded from. If it is not there, Pastel looks in the directory from which you originally loaded the bitmap.

Bar Code

Type

You can choose the type of bar codes you require. First choose the bar code type from the list box.

Once you do so, Pastel displays that type of bar code's characteristics. For example, some type have a fixed length, some are numeric only, and so on.

Calculate Checksum Digit

Some bar code types can have checksums built into them. Pastel can calculate the checksum character and add it automatically. Check the check box to use this feature

Show Bar Code Text as Part of Bar Code

You can show the text of the bar code or not, along with the bar code. Here is a bar code with and without text:
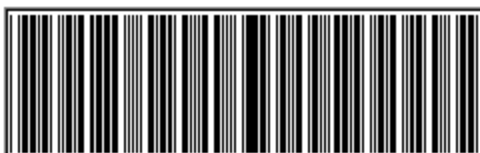
Check the check box to display the text. Uncheck the check box to hide the text.
Pastel displays a sample of the bar code in the properties window.

Note Bar codes take their value from the inventory item code on the inventory record.

Boxes / Lines

For boxes and lines, you can choose the line style:

Select the line style by clicking the one you require.

Cutting, Copying, and Pasting Objects

Once you have objects on your form, you can manipulate them in two ways:

* You can copy an object, along with all its properties, to the clipboard, and then paste one or more copies of the object on the form

* You can delete (cut) an object.

To copy and paste an object

1. Select the object.

2. Choose the Edit...Copy menu option, or press <CTRL>+C.

3. Choose the Edit...Paste menu option, or press <CTRL>+V.

Pastel then places the copy of the object in the centre of the screen, as if it is a new object. The new object has all the properties of the object you copied. Note that you cannot copy and paste picture or bar code objects.

To delete an object

1. Select the object.

2. Choose the Edit...Cut menu option, or press <CTRL>+X, or press <DEL>.

Manipulating Multiple Objects Simultaneously

In all the techniques we have discussed so far, we have dealt with a single object at a time. However, the forms designer lets you perform many of these techniques with multiple objects at the same time. You can:

- Lock and unlock multiple objects

- Move multiple objects

- Change the size of multiple objects

- Insert multiple database objects

- Set properties for multiple objects.

More:

Selecting Multiple Objects

Locking Multiple Objects

Moving Multiple Objects

Changing the Size of Multiple Objects

Inserting Multiple Database Objects Into a Form

Setting Multiple Object Properties

Selecting Multiple Objects

The first thing you need to know is how to select more than one object at a time.

Note If you are going to do any aligning or group moving, the object you select first is important. We call it the *primary* object. Any other objects you select are *secondary* objects.

To select multiple objects

1. Click anywhere on the first (primary) object. Pastel places selection handles around it.

2. Select additional (secondary) objects by holding the <SHIFT> button as you click on them. Pastel changes the background colour of all selected objects to grey. Here is an example:
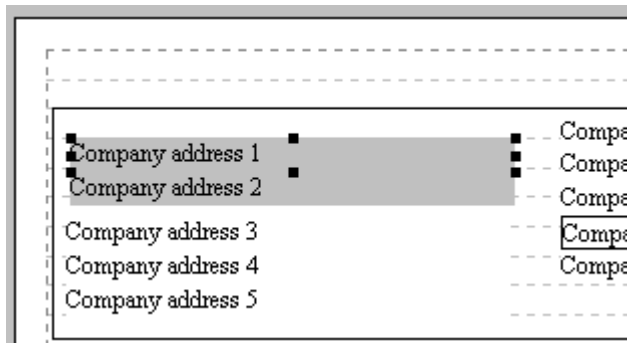
In this example, "Company address 1" and "Company Address 2" are selected. "Company address 1" has selection handles around it because it is the first object you selected.

3. You can de-select a secondary object by <SHIFT> + clicking it. This makes the secondary object unselected.

4. To de-select all the objects, including the primary object, click anywhere on the form where there are no objects.

Locking Multiple Objects

You can lock and unlock multiple objects.

To lock/unlock multiple objects

1. If you want to lock multiple objects, ensure that the primary object is currently unlocked. If you want to unlock multiple objects, ensure that the primary object is currently locked.

2. Select the primary object by clicking it, and then select the secondary objects by <SHIFT> clicking them.

3. Click the Lock icon in the toolbar, or choose the Align... Lock/Unlock menu option.

4. Pastel toggles the primary object's lock state, and then applies that state to all the secondary objects.

Moving Multiple Objects

You can move multiple objects at the same time. This includes the ability to select a box and its contents, and then move them all at the same time.

To select and move multiple objects

1. Select the primary object by clicking it, and then select the secondary objects by <SHIFT> clicking them. If you are selecting a box and its contents, select the box as the primary object.

2. To move, click anywhere in the primary object and hold the left mouse button. Drag the primary object to its correct position.

3. Once the object is in the correct position, release the mouse button. Pastel moves the secondary objects to their new positions, relative to the primary object.

Changing the Size of Multiple Objects

You can change the size of multiple objects. Pastel sets the size of secondary objects the same size as the primary object.

To change the size of multiple objects

1. Select the primary object, and set its size if necessary.

2. Select the secondary objects by <SHIFT> clicking them.

3. To change the width of all secondary objects to the width of the primary object, select the Group Set Width icon or select the Align...Group Set Width menu option.

4. To change the height of all secondary objects to the height of the primary object, select the Group Set Height icon or select the Align...Group Set Height menu option.
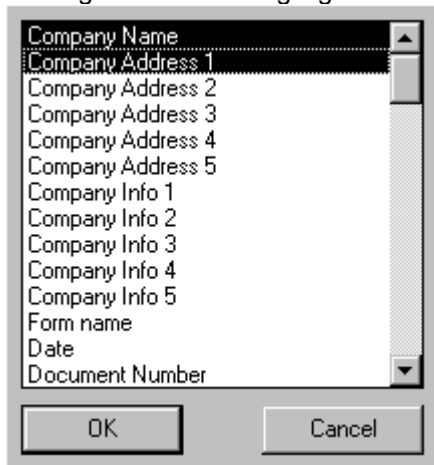
Note   Pastel sizes pictures automatically; you cannot change picture sizes.

Inserting Multiple Database Objects Into a Form

When you insert database objects, you can also select multiple objects.

To insert multiple database objects

1. Click the Database icon, or choose the Insert...Database menu option.

2. Pastel displays a list of the available database fields.

3. Select the first field you require by clicking on it.

4. Select subsequent contiguous fields by <SHIFT> clicking them. Select non-contiguous fields by <CTRL> clicking them. Pastel highlights each field you select:

```
Company Name
Company Address 1
Company Address 2
Company Address 3
Company Address 4
Company Address 5
Company Info 1
Company Info 2
Company Info 3
Company Info 4
Company Info 5
Form name
Date
Document Number

    OK              Cancel
```

5.   Click the OK button to insert the fields. Pastel shows the first object. Drag it to its position. Pastel places the rest of the objects underneath the first one. The first database object on the list becomes the primary object.

Note   No matter how many objects you select, Pastel will only insert the first six objects.

Setting Multiple Object Properties

You can set the properties of multiple objects simultaneously. For example, you can select text objects and database objects, and then select their fonts.

To access the properties of multiple objects

1. Select the objects.

2. Right-click with the mouse or select the Edit...Properties menu option.

3. Pastel shows the primary object's properties. Once you change these, Pastel applies them to the secondary objects as well. If a secondary object does not have the property you changed on the primary object, Pastel ignores it for that secondary object.

Aligning Objects

Pastel lets you align objects with each other in different ways. This removes the tedium of you having to manually align objects to each other.

In this section, the concept of primary and secondary objects is crucial. Most aligning is done relative to the primary object.

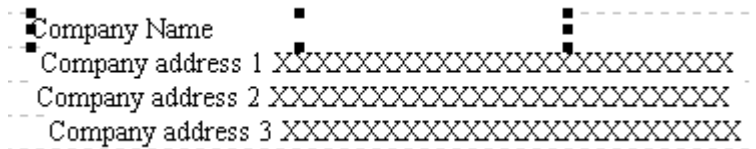**More:**

Aligning and Spacing Objects to the Primary Object

Centering Objects

Aligning and Spacing Objects to the Primary Object

You can align and space objects relative to the primary object in four different ways: left, right, top, and bottom.

To align objects on the left

1. Select the primary object, and ensure that it is positioned correctly:
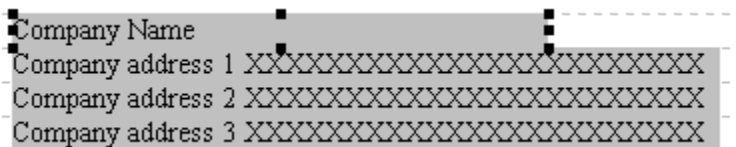

2.   Select the secondary objects by <SHIFT> clicking them.
3.   Click the Align Left icon, or choose the Align...Left menu option. Pastel asks you to enter the vertical spacing in twips:
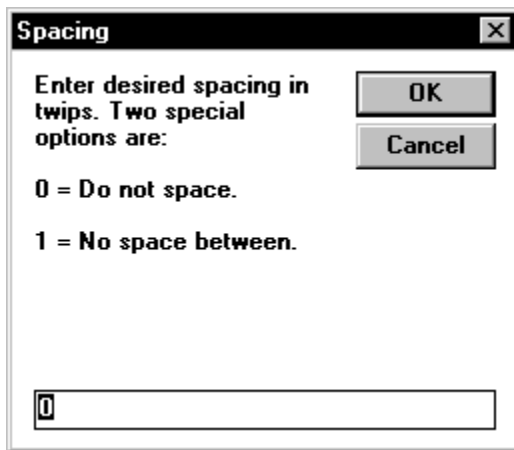
To leave the spacing as it currently is, enter 0. To place objects next to each other, enter 1. To space them *n* twips from each other vertically, enter *n*.
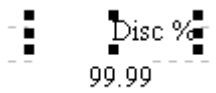4.   Pastel aligns the objects:

Use this to align text objects or database objects which contain descriptions.
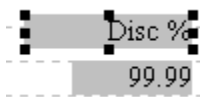
To align objects on the right

1. Select the primary objects, and ensure that it is positioned correctly:

2.   Select the secondary objects by <SHIFT> clicking them.
3.   Click the Align Right icon, or choose the Align...Right menu option. Pastel asks you to enter a spacing in twips. To leave the spacing as it currently is, enter 0. To place objects right next to each other, enter 1. To space them *n* twips from each other vertically, enter *n*.

4.   Pastel aligns the objects:

Use this to align database objects which contain numbers, as well as their headings (text objects).

To align objects to the top

1. Select the primary object, and ensure that it is positioned correctly:

2.   Select the secondary objects by <SHIFT> clicking them.
3.   Click the Align Top icon, or choose the Align...Top menu option. Pastel asks you to enter a horizontal spacing in twips. To leave the spacing as it currently is, enter 0. To place them right next to each other, enter 1. To space them *n* twips from each other, enter *n*.
4.   Pastel aligns the objects:

Use this to align objects horizontally. The secondary objects' top borders align with the primary object's top border.

To align objects to the bottom

1. Select the primary object, and ensure that it is positioned correctly:

2.   Select the secondary objects by <SHIFT> clicking them.
3.   Click the Align Bottom icon, or choose the Align...Bottom menu option. Pastel asks you to enter a horizontal spacing in twips. To leave the spacing as it currently is, enter 0. To place them right next to each other, enter 1. To space them *n* twips from each other, enter *n*.
4.   Pastel aligns the objects:

This makes each secondary object start on the primary object's bottom border.

Centering Objects

You can centre one or more objects automatically. Pastel centres the secondary objects relative to the primary object.

For example, you can select a text object (heading) as a primary object, and a database object as a secondary object. Pastel will then centre the database object under the heading.

A more common use of this facility is to centre objects inside a box:

To centre one or more objects in a box

1. Select the box as the primary object.

2. Select the object(s) to centre as the secondary object(s). For example:
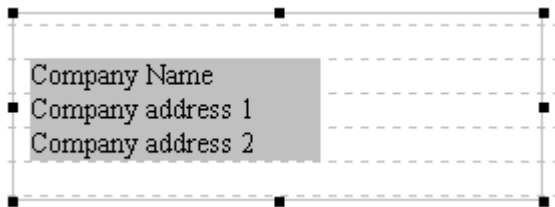
In this example, we are going to centre the company name and the two address lines in the box.

3. Click the Centre in Container icon or Choose the Align...Centre in Container menu option:
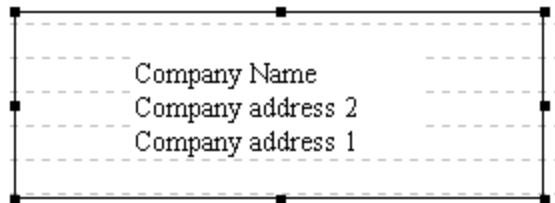
Pastel centres the secondary objects horizontally in the box, and de-selects the secondary objects.

The Show/Hide Envelope Option

If you design a new invoice or statement type form, and you wish to post these in window envelopes, you would like to know approximately where to place the customer's name and address on the form.

The optimal position is where you can make the least number of folds and still ensure that the document fits snugly into the envelope.

If you use this option, Pastel places a picture of where you should place these objects. You can design over this area, or show and hide it when you like. The command is a toggle command, which means that you invoke the command to show the window, and you invoke it again to hide the window.

Pastel also shows a fold mark on the form, so that you can see where best to fold it. This assumes that the envelope's height is 115mm.

Note   Always test the document by printing one out, folding it, and inserting it into the window envelope. Do NOT rely solely on the Pastel guideline.

To access this option, select the Show/Hide Window Envelope icon, or choose the Align...Show/Hide Window Envelope menu option.