Custom Forms

Table of Contents

Chapter 1

Forms Overview

In MYOB Accounting Plus, *forms* are documents that you'll often use in your day-to-day business. Usually, forms are used to track transaction activity, such as the sales and purchases you make. Typical forms include sales, purchases and cheques. In Accounting Plus, administrative documents such as mailing labels and personalised letters are also considered forms.

Accounting Plus provides you with a great deal of flexibility as you work with forms. You can choose to print a form on plain paper or you can choose to purchase a pre-printed paper form; the choice is yours. You can choose the type of form and the range of dates and transaction numbers you wish to print, and you can choose to customise the look of the form so they use the text styles you prefer.

Idea: Get ready to print forms
Before you begin working with and printing your forms, we suggest that you review "Choosing preference settings for reports and forms" on page 976.

Finding forms

Each MYOB Accounting Plus form can be found in the Command Centre in which the form's associated transaction was entered. Here's a list of the MYOB Accounting Plus Command Centres and their forms.

Chequebook Command Centre

Type of Form	To find the form, click:
Cheques	Print Cheques

Sales Command Centre

Type of Form	To find the form, click:

Sales (item, service, time billing and professional)	Print Sale Forms
Packing Slips (item, service and professional)	Print Sale Forms
Labels (item, service, time billing and professional)	Print Sale Forms
Statements (invoice and activity)	Print Statements
Cheques	Sales Register>Returns & Credits

Purchases Command Centre

Type of Form	To find the form, click:
Purchases (item, service and professional)	Print Purchase Orders
Cheques	Print Cheques

Card File Command Centre

Type of Form	To find the form, click:
Mailing labels	Print Mailing Labels
Personalised letters	Create Personalised Letters

Payroll Command Centre

Type of Form	To find the form, click:
Paycheques	Print Paycheques
P14/P60 forms	Print P14/P60's

Printing forms

Once you've found the form you want to print, you're ready to make some important decisions about how you want to print the form. Before you begin printing, you can choose a form type, the specific information you want to display on the form, and the type of paper you intend to print the form on. You can also print alignment forms to ensure your information prints properly on the paper in your printer, and you can personalise the look of your forms.

Choosing the form you want to print

The Selected Form list at bottom section of all Forms Selection windows (except for personalised letters) allows you to choose the form you wish to use when you print your forms. MYOB Accounting Plus provides a number of choices, depending upon the type of form you're currently working with. Each of the forms are described below; make the selection that best fits your needs.

- Select the **pre-printed form** layout if you want to print a form's information onto paper that already contains lines, columns and headings. The pre-printed layout is designed to match most commonly used forms provided by third-party forms suppliers.

- Select the **plain paper form** if you want to print a form's information onto blank paper. Lines, columns and headings are automatically printed with the form's information.

- Select a **customised form** if you want to print a form you've already customised and named using the form's Customise window. Depending upon the form layout you customised, lines, columns and headings may be automatically printed with the customised form's information.

- If you're viewing the Forms Selection window for cheques or paycheques, choose the **Continuous Feed Cheque form layout** or the **Laser Cheque form layout**, or a custom form you've created. The Continuous Feed Cheque form allows you to print cheques on connected sheets of cheque forms; the Laser Cheque form allows you to print cheques one page at a time on a laser printer. The Laser Cheque form is also set up so two cheque stubs are printed after the cheque form.(See "Tips for customising cheques" on page 1020 to learn more about customising your cheques and cheque stubs.)

- If you're viewing the Forms Selection window for mailing labels or labels for sales, choose from a list of measured form or a custom form you've created. Measured forms are determined by a variety of factors on your computer. For example, if you're using metric settings on your computer, you can choose between two label forms that use metric measurements.

> **Note: You may have more than one custom form for your forms**
> If you are printing one of the following forms, you may have more than one custom form.
>
> Sales, packing slips and labels
> Cheques and paycheques
> Statements
> Purchases
> Mailing labels
>
> See "Customising forms" on page 1017 to learn how to use the Customise window to personalise the look of your printed forms.

See the following step-by-step procedure:

"Printing forms" on page 1023

Customising forms

Each of MYOB Accounting Plus's forms is unique in the information it provides and the specific layouts it reflects. Depending upon the needs of your business, the forms that are already set up when you begin using Accounting Plus may fully serve your needs.

> **Note: Decide whether you need to customise the form**
> Accounting Plus provides an extensive set of well-designed form layouts so you can begin printing professional-looking documents immediately. This set of forms is designed to print properly on MYOB software-compatible business forms. If the Accounting Plus form layouts match your preprinted forms, you don't need to customise your forms.
> If the preprinted forms you currently use don't match the form layouts provided in Accounting Plus, you'll need to customise the form layouts for each form that doesn't match your preprinted forms.

You may, however, occasionally find the need to make changes to specific forms to better accommodate your business needs. You can modify the look and content of individual forms in many ways. You can choose the types of information you want on your forms, design the way you want your forms to look, add graphics to enhance the appearance of your forms, change fonts and styles, draw lines and shapes, and select the size of the paper you'll print your forms on. In other words, there's little you *can't* do if you're customising your forms.

Note: If you've created custom forms using a previous MYOB product

If you've created custom forms using a previous MYOB product, you may not be able to display and print them using MYOB Accounting Plus Version 11. Because of the addition of new forms fields, changes of field names or changes to the length of information that will be displayed and printed for a field, you may need to recustomise those forms.

See the following step-by-step procedures:

"Customising forms" on page 1026

"To activate a data field" on page 1029

"To inactivate a data field" on page 1036

Opening a form in the Customise window

When you first open the Customise window, several elements of the form are in view. Data fields will print information from your Accounting Plus company file. Data fields appear with their name in brackets and the field is surrounded by a box. You can view the name of data fields that are active—data fields that will print. Data fields that are inactive—data fields that won't print unless you activate them—are shown in dimmed text.

Text fields are shown without surrounding boxes. What you see in the text field is what actually prints on the form.

See the following step-by-step procedure:

"To open the form in the Customise window" on page 1026

"To activate a data field" on page 1029

Adding a picture or logo to a form

You can add a bitmap file graphic (typically assigned the extension .BMP) in an Accounting Plus form or you can add a graphic that isn't a bitmap. Either the paste or load procedure can be used to add a picture to a form; both will produce the same results.

If the picture you want to use is in a format other than .BMP, such as .GIF or .JPG, use the "To paste a picture into a form" on page 1028 procedure. Accounting Plus can display nearly any picture that appears on the Clipboard, regardless of its original format.

See the following step-by-step procedure:

"To add a picture or logo to a form" on page 1028

Printing alignment forms

Since it's important that your printed information is positioned correctly on paper forms, Accounting Plus allows you to print *alignment forms* to ensure the information you'll print is aligned in the proper locations. When you print an alignment form, no actual information is printed on the form in your printer; instead, generic information will appear on the page where actual information would appear if you were printing an actual form.

See the following step-by-step procedure:

"To print an alignment form" on page 1024

Reviewing forms before printing

Before you begin printing, Accounting Plus allows you to review the information that's about to be printed on your forms. This review process allows you to view summaries of the information that will be printed on your forms, choose specific forms to print, and, if you're reviewing sales, choose to print packing slips and delivery or mailing labels immediately after you print your sales. Depending on the form you're working with, you can also zoom to transaction or card detail while you're reviewing your forms.

See the following step-by-step procedure:

"To review forms and print them" on page 1025

Tips for customising cheques

- Cheques differ slightly from other Accounting Plus forms because the entire cheque form is composed of two forms -- the cheque form and the stub form. Cheque stubs typically contain data fields that summarise the information that appears on the main part of the cheque that the stub is attached to.In Accounting Plus, four types of cheque stubs exist: The **Regular Stub** layout is automatically assigned to cheques that are written using the Spend Money window.

- The **Payable Stub** layout is automatically assigned to cheques that are written using the Pay Bills window.

- The **Paycheque Stub** layout is automatically assigned to paycheques that are written in the Pay Employees window.

- The **Refund Cheque Stub** layout is automatically assigned to cheques that are written using the Settle Returns & Credits window.

If the cheques you use have a cheque form that is printed between two stub forms, see "Adding a cheque form between two stub forms" on page 1021.

If you want to print debit memo information on your payable cheque stubs, see "Displaying applied debit memos on cheque stubs" on page 1020.

See the following step-by-step procedures:

"To customise the cheque form" on page 1039

"To customise the stub form" on page 1040

Displaying applied debit memos on cheque stubs

If the debit memos you've applied only partially pay for a purchase, you can include the debit memos on the stub of the cheque you use to complete the payment for the purchase. To do this, you must create and use a customised cheque format.

See the following step-by-step procedures:

"To display applied debit memos on cheque stubs" on page 1041

Adding a cheque form between two stub forms

Some companies prefer to include two cheque stubs with each cheque. Sometimes, when this type of form layout is used, the cheque form is located between the two cheque stubs. In a few steps, you can customise your cheque layout to incorporate two stubs in this manner. Use the following procedure to customise a cheque with a stub above it and a stub below it.

> **Note: If you want two stubs below a cheque**
> If you want two stubs to be printed after the cheque form is printed, you simply need to choose the Laser Cheque selection from the Selected Form for Cheques list at the bottom of the Forms Selection window for cheques before you print the cheque forms. You don't need to follow these instructions.

See the following step-by-step procedure:

"To add a cheque form between two stub forms" on page 1042

Tips for customising purchases

Item purchases contain a variety of information that's intended to serve the needs of most businesses. However, you may find it useful to review the data fields that appear on the original item purchase form before you begin printing item purchases, in case the data fields we've selected don't match your needs exactly.

The item numbers that are printed on item purchases are an important piece of information. The item numbers that are automatically set to print on an item purchase are the *main supplier's* item numbers, not the item numbers you assigned to items in the Item Information window. If you want *your* item numbers to print on an item purchase, you can choose to customise the purchase. This section contains information about how to ensure the item numbers you want are printed on your item purchases.

Printing the main supplier's item numbers on an item purchase

To ensure the main supplier's item numbers are printed on an item purchase, the following conditions must exist:

- A main supplier must be assigned to the item. Main Suppliers are assigned to individual items in the Main Supplier for Reorders field in the Buying Details view of the Item Information window.

- An item number must be assigned to the item for the main supplier. This number is entered in the Supplier Item Number field in the Buying Details view of the Item Information window.

- The main supplier for the item must be entered in the Supplier field of the Purchases window.

If these conditions don't exist, no item numbers will be printed on the default item purchase.

See the following step-by-step procedure:

"To print your item numbers on an item purchase" on page 1045

Tips for customising labels

Accounting Plus's label forms are set up so they can be printed easily on popular labels. Depending upon the system of measurement your computer uses, you can select from a set of measured form layouts. If your computer is set to track inches, you can choose between 2.75" by 4.25" and 2.875" by 1" label form layouts. If your computer is set to track centimeters, you can choose between 7.3cm x 2.54cm and 3.81cm x 10.16cm label form layouts.If these label sizes don't suit your needs, you can change the size of your labels using the Customise window.

See the following step-by-step procedure:

"To change the size of your labels" on page 1047

Changing the position of your labels

Some printers aren't capable of printing information on the top row of label paper. If this is your situation, you'll need to customise your label form so the form's top margin matches the printing capabilities of your printer.

See the following step-by-step procedure:

"To change the position of your labels" on page 1048

Chapter 2

Printing forms

Step 1: Choose the information you want to print

To choose the information you'll print

If you haven't already read the Forms Overview, see "Printing forms" on page 1016 for more information.

1. Open the Forms Selection window for the form. (If you don't know how to find the form you want to print, see "Finding forms" on page 1014 for help.)

2. In the top portion of the Forms Selection window, choose the various elements that you want to appear on your forms, including the type of form you want to print, the status of the transactions you want to print, as well as ranges of transaction dates and transaction numbers that apply to the form you plan to print.

3. In the bottom portion of the window, select the form layout you wish to use.

Step 2: Customise the form (optional)

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

See the following step-by-step procedure:

"Customising forms" on page 1026

Step 3: Print alignment forms (optional)

To print an alignment form

If you haven't already read the Forms Overview, see "Printing alignment forms" on page 1019 for more information.

1. Load the paper you intend to use for your documents into your printer. If you're using a continuous-feed printer, be sure the paper is as straight as possible.

2. Click the Print Alignment button. (This button will also display the name of the type of form you're printing.)

3. Depending upon the type of computer you use and the settings you've established for your printer, the alignment form may begin to print immediately, or a print window may appear on your computer screen. If a print window appears, make your selections in the window, then click the button in the window that begins the printing process (the button is usually labeled "OK" or "Print").

4. After the form is finished printing, review the document to see whether the generic text was printed in the proper locations on the paper. If the information isn't displayed the way you want, you may need to either change the position of the paper in your printer or customise the form layout so the information is printed where you want it on the paper.

5. You can print as many alignment forms as you want. If your first attempt at aligning the information on the page wasn't correct, make the necessary changes, then follow steps 1 to 4 until you're satisfied with the way the information will be printed.

Idea: Don't waste your forms!

After you're satisfied with the changes you've made to your forms, consider printing some alignment forms to verify whether the changes you made print correctly on your printer. Print alignment forms by clicking the Print Alignment button in the Forms Selection window.

When you're printing alignment forms, though, don't waste the valuable preprinted paper forms you normally use—use plain paper instead. You should be able to easily compare the alignment text on the plain paper with a preprinted form.

Step 4: Review the forms you've selected for printing and print them

To review forms and print them

If you haven't already read the Forms Overview, see "Reviewing forms before printing" on page 1019 for more information.

1. Click the OK button in the Forms Selection window.

2. Review the transactions that are displayed. If you don't want to print a form for one or more of the transactions, click in the Print column next to each of the transactions to remove the X that appears there.

   Click the All button to mark all transactions in the window; click None to unmark all transactions in the window.

   If you want to print multiple copies of the form, enter the number of copies you want in the Print XX Copies field.

   Click the zoom arrow next to the transaction to view the transaction in the window in which it was created.

3. Click the Print button to begin printing the forms.

4. Depending upon how your computer is set up, the first form may begin to print immediately, or a print window may appear on your computer screen. If a print window appears, make your selections in the window, then click the button in the window that begins the printing process (the button is usually labeled "OK" or "Print").

> **Note: If you can't make entries in your print selection window**
>
> If you're unable to make entries or selections in your print window, your printer driver software may not be up to date. See "Checking your Windows printer driver software" on page 1053 for more information about printer drivers.

Chapter 3

Customising forms

Step 1: Open the form in the Customise window

To open the form in the Customise window

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 and "Opening a form in the Customise window" on page 1018 for more information.

1. Open the Forms Selection window for the form you want to customise. See "Finding forms" on page 1014 to learn how to do this.

2. Make selections and entries so that you start the customisation process using the version of the form you want.

    - Use the top of the window to select the correct type of form.

    - Be sure to select the correct Form in the bottom of the window.

3. Click Customise.

Step 2: Add elements to the form (optional)

To add a text field to a form

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you want to customise should be displayed.

1. Click the text tool (it's an icon with the letter A on it, and it appears at the bottom of the window), then click the location on the form where you want the new text field to appear. A new text field, labeled "Text Field," appears.

2. Double-click the new field to open the Field Information window.

3. In the Text field of the Field Information window, enter the characters you want to use in the text field you created

4. Click OK to close the Field Information window. The new field will be displayed in the Customise window.

If the text you entered is longer than the size of the new text field, you may need to change the size of the text field. See "To change the size of a data field, text field, rectangle or picture" on page 1030 to learn about changing the size of a text field.

To draw a line on a form

The customise window for the form you want to customise should be displayed.

1. Click the line tool (it's an icon with a cross on it, and it appears at the bottom of the window), then click the location on the form where you want the line to begin; a cross appears on your computer screen.

2. Drag the cross to where you want the line to end, then release the mouse button.

To draw a rectangle on a form

The customise window for the form you want to customise should be displayed.

1. Click the rectangle tool (it's an icon with a rectangle on it, and it appears at the bottom of the window), then click the location on the form where you want the top left corner of the rectangle to appear; a cross appears on your computer screen.

2. Drag the cross to where you want the bottom right corner of the rectangle to appear, then release the mouse button.

To add a picture or logo to a form

If you haven't already read the Forms Overview, see "Adding a picture or logo to a form" on page 1019 for more information.

The customise window for the form you want to customise should be displayed.

To paste a picture into a form

1. Using whatever graphics program you normally use, copy the graphic to the Clipboard.

2. In Accounting Plus, click the picture tool in the Customise window (it's an icon with a picture frame; it appears at the bottom of the window). Then click the location on the form where you want the picture to appear. A picture field appears.

3. Double-click the picture field to open the Field Information window. Click the Paste Picture button; the graphic appears.

   If the Paste Picture button in the Field Information window is inactive, be sure the graphic has been copied to the Clipboard.

4. Click OK.

To load a picture into a form

1. In MYOB Accounting Plus, click the picture tool in the Customise window (it's an icon with a picture frame; it appears at the bottom of the window). Then click the location on the form where you want the picture to appear. A picture field appears.

2. Double-click the picture field to open the Field Information window. Click the Load Picture button; the Open dialog box appears.

3. Using the Open dialog box, highlight the bitmap image you want to use and click OK. The image appears in the Customise window.

To add a data field to a form

You can't -- and probably don't need to -- add data fields to a form. Each form is supplied with an extensive array of data fields that apply to the form's purposes. However, you might be able to serve your needs by activating or pasting a copy of a data field on a form. To do this, use "To activate a data field" on page 1029 and "To copy and paste a data field" on page 1029. To view all of the fields -- both active and inactive -- that are available on a form display the Customise window for that form. If you need help doing this, see “Open the form in the Customise window” on page 1026.

To activate a data field

If you haven’t already read the Forms Overview, see “Customising forms” on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Double-click the field you want to activate.
2. Mark the Field Is Active selection on the right side of the window.
3. Click OK.

To copy and paste a data field

If you haven’t already read the Forms Overview, see “Customising forms” on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Click the data field once to select it.
2. Choose Copy from the Edit menu.
3. If you want to paste the data field onto another form, display that form in the Customise window.

> **Note: Pasting data fields onto other forms**
> You can copy a data field and paste it onto another form, but only if the form onto which you’re pasting is the same type of form as the form from which you copied the field. For example, you can copy a data field from a plain-paper item sale to a customised item sale, but you can’t copy a data field from an sale form to a statement form.

4. Choose Paste from the Edit menu. A copy of the data field will appear in the window.

Step 3: Change elements on the form (optional)

To change the size of a data field, text field, rectangle or picture

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

There are two ways to change the size of a data field or text field in the Customise window. They are:

- Use the pointer. To do this, follow these steps:
  1. Highlight the field you want to change; a solid line appears around it.
  2. A small square, called a "handle," appears in the bottom right corner of the field. To change the size of the field, simply drag the handle.
- Change the field's exact size. To do this, follow these steps:
  1. Double-click the field you want to change. The Field Information window appears.
  2. In the two Field Size boxes in this window, enter the vertical and horizontal sizes of the field.
  3. Click OK.

To change the length of a line

If you haven't already read the Forms Overview, see Customising forms for more information.

The customise window for the form you wish to customise should be displayed.

There are two ways to change the length of a line in the Customise window:

- Use the pointer. To do this, follow these steps:

1. Select the line you want to change.

2. Two small squares, called “handles,” appear on each end of the line. To change the length of the line, simply drag either handle.

- Change the line’s exact length. To do this, follow these steps:

1. Double-click the line you want to change. The Field Information window appears.

2. Change the bottom Field Location box to the length you want.

3. Click OK.

To change the text in a text field

If you haven’t already read the Forms Overview, see “Customising forms” on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Double-click the text field in the Customise window to open the Field Information window.

2. Change the text in the Text field of the Field Information window.

3. Click OK.

To change the font characteristics of a data field or text field on a form

If you haven’t already read the Forms Overview, see “Customising forms” on page 1017 for more information.

Idea: Other ways to change fonts

You can change the default font that appears on every non-customised form by choosing Default Fonts from the File menu, or by clicking the Forms button that appears in the Reports & Forms view of the Preferences window. See "To change the font characteristics of all data fields or text fields on all non-customised forms" on page 1032 for a step-by-step procedure.

You can change the font characteristics for more than one field on a form by using the SHIFT key. See "To change the font characteristics of several data fields or text fields on a form" on page 1032 for a step-by-step procedure.

The customise window for the form you wish to customise should be displayed.

1. Double-click the field you want to change. The Field Information window appears.
2. Make your choices in the Justify, Font, Size and Style fields in this window.
3. Click OK.

To change the font characteristics of several data fields or text fields on a form

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

1. Holding down the SHIFT key, click the fields you wish to change. (A box will appear around each field you've selected.)
2. Choose Change Fonts from the Form menu.
3. In the Font window, choose the Font, Font style and Size you wish.

To change the font characteristics of all data fields or text fields on all non-customised forms

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

1. Choose Default Fonts from the File menu.
2. Click the Forms button.
3. Choose the font and size you wish and then click OK.

To change the orientation of a line

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Double-click the line in the Customise window to open the Field Information window.
2. Select either Horizontal or Vertical in the Orientation field.
3. Click OK.

To change the thickness of a line or rectangle

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Double-click the line or rectangle in the Customise window to open the Field Information window.
2. Choose a thickness in the Line Size or Frame Size section of the Field Information window.
3. Click OK.

To change the size of a picture or logo

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Click the picture or logo to select it. A thin border will appear around it, and a small black square, called a “handle,” will appear in the lower right corner.

2. Place the mouse pointer over the handle and press and hold the mouse button. The pointer should change to a plus sign (+).

3. Continue to hold down the left mouse button and drag the mouse; the size of the picture will change as you move the mouse. When the picture is the size you want, release the mouse button.

Although you can’t edit a picture in Accounting Plus (other than to change its size), you can replace an existing picture with a different picture. If you need to edit a picture, you’ll need to use a graphics program to do so; after the picture is edited, you can then replace the old picture with the edited picture.

Step 4: Move elements around on the form (optional)

To move a data field or text field

If you haven’t already read the Forms Overview, see “Customising forms” on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

There are two ways to move a data field or a text field. They are:

- Use the pointer to select the field you want and drag it to the new location
- Change the field’s exact coordinates. To do this, follow these steps:

    1. Double-click the field you want to move. The Field Information window appears.

    2. In the two Field Location boxes in this window, enter where you want the top and left edges of the field to be located on the form.

    3. Click OK.

To move a line

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

There are two ways to move a line:

- Use the pointer to select the line you want and drag it to the new location
- Change the line's exact coordinates. To do this, follow these steps:
    1. Double-click the line you want to move. The Field Information window appears.
    2. Enter the distance from the top and left edges of the form where you want the line to begin in the top two Field Location boxes.
    3. Click OK.

To move a rectangle or picture

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

There are two ways to move a rectangle or picture:

- Use the pointer to select the element you want and drag it to the new location
- Change the element's exact coordinates. To do this, follow these steps:
    1. Double-click the element you want to move. The Field Information window appears.
    2. Enter the distance from the top and left edges of the form where you want the line to begin in the top two Field Location boxes.
    3. Click OK.

Step 5: Remove elements from the form (optional)

To remove a text field, line, rectangle or picture from a form

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

To remove a text field, line, rectangle or picture, select the element and press BACKSPACE or DELETE on your keyboard.

To remove a data field from a form

You can't remove data fields from a form. If you don't want a particular data field to print on a form, you can inactivate the data field. See "To inactivate a data field" on page 1036 to learn how to inactivate a data field you don't want on a form.

If you have more than one copy of the same data field on a form, however, you can remove the copies.

To inactivate a data field

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

1. Double-click the field you want to inactivate; the Field Information window appears.

2. Unmark the Field Is Active selection on the right side of the window.

3. Click OK.

Step 6: Preview the customised form (optional)

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

To preview the customised form

1. Click the Preview button to open the Print Preview window, displaying the form.

2. If you wish to view the form in more detail, click the zoom buttons on the left side of the window.

3. If you want to check your current printer and Print settings, click the Print Setup button.

4. Click OK.

Step 7: Save the customised form

To save the customised form

If you haven't already read the Forms Overview, see "Customising forms" on page 1017 for more information.

The customise window for the form you wish to customise should be displayed.

If you wish to save changes you've made to a custom form you created previously, click the Save Form button.

If you wish to create a new custom form layout that contains the changes you've made, click the Save Form As button. Enter a name and a brief description for the new layout and click OK.

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Note: Where are my custom forms stored?
Your custom form information is stored in the FORMS folder inside the folder on your workstation in which MYOB Accounting Plus is installed. For example, if MYOB Accounting Plus is installed in C:\MYOBAccounting Plus, your custom forms will be stored in C:\MYOBAccounting Plus\FORMS. Each custom form will appear in the FORMS folder.

If you use MYOB Accounting Plus on a network When you create custom forms, the information about the custom forms is stored on your workstation's hard disk, not on the network. Other users of the same company file won't be able to use your custom forms unless you copy the custom forms' information to the appropriate locations on their workstations. You can use Windows Explorer to copy the custom form files onto other users' workstations (You may want to ask your system administrator to perform this task.).

Step 8: Print the customised form

▶ To print the customised form

1. Open the Forms Selection window for the form you customised.
2. Select the customised form you wish to use from the Selected Form list.
3. Click OK to begin the printing process.

Chapter 4

Tips for customising cheques

Customising a cheque form

To customise the cheque form

If you haven't already read the Forms Overview, see "Tips for customising cheques" on page 1020 for more information.

> **Note: An entire cheque form has two parts**
> An entire cheque form has two parts—the cheque form and the stub form. To customise the entire cheque form, you'll need to perform two separate tasks: customise the cheque form and customise the stub form.

1. Open the cheque form you want to modify using the Customise window. (See "To open the form in the Customise window" on page 1026 if you need to learn how to do this.) Notice that only the fields for the cheque, not for the stub, appear in the window

2. Open the Form menu at the top of your computer screen; notice that the Cheque Layout command is selected. This indicates that you're currently viewing the layout for the cheque form only.

3. Customising the cheque form is the same process as customising any other form: you can move, activate and inactivate data fields and add, remove and change the characteristics of text fields, lines, rectangles and pictures.

   Make any changes you want to the cheque form. If you need help, see "Customising forms" on page 1017 for more information about making basic changes to your forms.

To customise the stub form

If you haven't already read the Forms Overview, see "Tips for customising cheques" on page 1020 for more information.

> **Note: An entire cheque form has two parts**
> An entire cheque form has two parts—the cheque form and the stub form. To customise the entire cheque form, you'll need to perform two separate tasks: customise the cheque form and customise the stub form.

1. If it's not already displayed, open the cheque form you want to modify using the Customise window. (See "To open the form in the Customise window" on page 1026 if you need to learn how to do this.) Notice that only the fields for the cheque, not for the stub, appear in the window.

2. From the Form menu, choose the type of stub you want to customise. When you select a stub type, the cheque form's fields will be dimmed, and the appropriate stub form's fields will appear at the bottom of the Customise window. (You may need to use the scroll bar on the right side of the Customise window to view the stub's fields.)

> **Note: Getting back to the cheque form**
> When a stub form is displayed in the Customise window, the fields and other items that make up the cheque form aren't accessible. If you need to make changes to the cheque form again, choose Cheque Layout from the Form menu.

3. After you've selected the stub you want, customising the stub form is the same process as customising any other form: you can move, activate and inactivate data fields and add, remove and change the characteristics of text fields, lines, rectangles and pictures.

   Make any changes to the cheque stub at this time. If you need help, see "Customising forms" on page 1017 for more information about making basic changes to your forms.

4. If you want, you can make changes to all four available cheque stubs at this time; however, the changes you make to one stub won't be made to the other stubs. You'll have to change each stub individually if you want the same change to apply to all four stubs.

Idea: Preview your forms
Remember that you can preview the changes you make at any time by clicking the Preview button in the Customise window.

5. When you're finished making changes to the cheque form and stub forms, click Save Form in the Customise window. If you're making changes to a custom layout, all changes you've made will be saved. If you're working with one of MYOB Accounting Plus's predefined form layouts, the Save As window appears; enter a name and description for your new form layout and click OK.

Idea: Don't waste your cheque forms!
After you're satisfied with the changes you've made to your cheques and cheque stubs, consider printing some alignment cheques to verify whether the changes you made print correctly on your printer. Print alignment cheques by clicking the Print Alignment Cheque(s) button in the Forms Selection window.

When you're printing alignment cheques, though, don't waste the valuable preprinted paper forms you normally use for cheques—use plain paper instead. You should be able to easily compare the alignment text on the plain paper with a preprinted form.

To display applied debit memos on cheque stubs

If you haven't already read the Forms Overview, see "Displaying applied debit memos on cheque stubs" on page 1020 for more information.

1. In the Chequebook Command Centre, click the Print Cheques option to display the Forms Selection window for Print Cheques.

2. Click the Customise button to display the Customise Cheques window.

3. Choose Stub Layout - Payable from the Form menu

4. Scroll to the bottom of the cheque stub layout, and locate the [YTD Debits] field. You may have to scroll to the right to see it.

5. Drag the [YTD Debits] field to the location you want on the stub layout, and rearrange any other fields if you need to do so.

6. Double-click the [YTD Debits] field to display the Field Information window.

7. Mark the Field is Active option and click OK.

If you need more information about creating and using customised forms, please see “Customising forms” on page 1017.

Adding a cheque form between two stub forms

To add a cheque form between two stub forms

If you haven’t already read the Forms Overview, see “Adding a cheque form between two stub forms” on page 1021 for more information.

1. In the Chequebook Command Centre, click Print Cheques to open the Forms Selection window for cheques.

2. In the Forms Selection window, choose Laser Cheque from the Selected Form for Cheques list at the bottom of the window, then click the Customise button. The Customise window appears.

3. From the Form menu, choose the stub form you want to include with the cheque. The stub’s fields will appear in the window (you may need to use the scroll bar on the right side of the window to view the stub’s fields.) Since you’re customising the Laser Cheque form layout, two stubs appear in the Customise window—that’s okay; you’ll be using both stubs.

4. Select all the items on the *first* cheque stub, including all active and inactive data fields, text fields and any drawing objects on the stub. To select multiple items, press the SHIFT key as you click the items you want to select.

> **Warning: Be careful selecting items on the stub!**
> Don’t use the Select All command to select all the items on the first cheque stub; you’ll mistakenly select all the fields on both the stubs.

5. Drag the selected stub's items to the proper position in the Customise window. Use the rulers and the dimmed cheque form's fields to find the location on the form where you want the stub to print. When you're satisfied with the location you've dragged the fields to, release the mouse button. (You'll probably place the stub's items directly on top of the cheque form, and the Customise window will look a little confusing for the time being.)

6. Choose Cheque Layout from the Form menu. Both stubs will disappear, leaving the cheque form's fields alone in the Customise window.

7. Choose Select All from the Edit menu to select all the cheque form's items.

8. Using the rulers as a guide, drag the cheque form's items into the proper position in the centre of the Customise Cheques window. (You may find it handy to verify the location of the cheque stub you moved in step 5. To do so, choose the appropriate stub from the Form menu. After you determine the location of the stub, choose Cheque Layout from the Form menu again.)

9. After you've positioned the cheque form correctly, choose the stub layout you're customising from the Form menu, then click the Preview button. The layout of the cheque form and the two stubs will appear in the Print Preview window. When you're finished viewing the layout, click OK to close the Print Preview window.

10. Continue moving the cheque stubs or cheque form until all items on the entire form are positioned the way you want, then click Save Form in the Customise window to save your changes. If you're making changes to a custom layout, all changes you've made will be saved. If you're working with one of MYOB Accounting Plus's predefined form layouts, the Save As window appears; enter a name and description for your new form layout and click OK.

Note: Be sure to change all the stubs you'll use with this form

Every custom cheque form you create has four cheque stub forms associated with it: Regular, Payable, Payroll Cheque and Refund. If you're planning to use your custom cheque form to print multiple types of cheques -- payable and refund cheques, for example -- be sure to modify all the appropriate stub form layouts.

The Regular Stub layout is automatically assigned to cheques that are written using the Spend Money window. The Payable Stub layout is automatically assigned to cheques that are written using the Pay Bills window. The Refund Cheque Stub layout is automatically assigned to cheques that are written using the Settle Returns & Credits window. The Paycheque Stub layout is automatically assigned to paycheques written using the Pay Employees window.

Chapter 5

A tip for customising purchases

Printing *your* item numbers on an item purchase

To print *your* item numbers on an item purchase

If you haven’t already read the Forms Overview, see “Tips for customising purchases” on page 1021 for more information.

1. In the Purchases Command Centre, click Print Purchase Orders to open the Forms Selection window for purchase forms.

2. Select Item from the Form Layout list.

3. In the Selected Form for Purchase list at the bottom of the window, select the item purchase form you use.

4. Click the Customise button at the bottom of the window. The Customise window appears.

5. Scroll through the window until you locate the field labeled [Supplier’s Item #]. (The field is usually located in the bottom half of the form.) When you find it, double-click it. The Field Information window appears, displaying information about the Supplier’s Item # field.

6. Unmark the Field is Active selection. The Supplier’s Item # field is now inactive on the item purchase.

7. Scroll through the Customise window again until you locate the field labeled [My Item #]. (This field is usually located on the far right edge of the Customise window, and may be partially obscured by another field.) When you find the field, double-click it. The Field Information window appears, displaying information about the My Item # field.

8. Mark the Field is Active selection. Click OK. The My Item # field is now active on the item purchase.

9. Drag the My Item # field to the location on the form where you want your item numbers to print. (You may want to place the field in the same location where the inactive Supplier's Item # field is located.)

10. When you're finished, click the Save Form As button. The Save As window appears; enter a name and a brief description for the new layout and click OK. (If you selected a custom form in step 1, click Save Form to save your changes without creating a new form layout.)

Chapter 6

Tips for customising labels

Changing the size of your labels

To change the size of your labels

If you haven't already read the Forms Overview, see "Tips for customising labels" on page 1022 for more information.

> **Warning: Changes may affect the way you print**
> Keep in mind that the changes you make to the size of your forms will most likely change the way the labels are printed using your printer.

To change the size of your labels, you must create a custom form layout. Follow these steps to do so.

1. In the Card File Command Centre, click Print Mailing Labels to open the Forms Selection window for mailing labels.

   or

   In the Sales Command Centre, click Print Invoices to open the Forms Selection window; choose the type of label you want to print from the Form Layout list.

2. Select the form layout of the labels you want to change from the Selected Form for Label list, then click the Customise button to open the Customise window.

3. Choose Forms Info from the Form menu to open the Forms Information window.

4. In the Forms Information window, change the entries in the Form Size fields and click OK.

5. In the Customise window, click the Save Form As button. The Save As window appears; enter a name and a brief description for the new layout and click OK. (If you selected a custom form in step 1, click Save Form to save your changes without creating a new form layout.)

Changing the position of your labels

▶ To change the position of your labels

If you haven't already read the Forms Overview, see "Changing the position of your labels" on page 1022 for more information.

> **Warning: Changes may affect the way you print**
> Keep in mind that the changes you make to your forms' margins will most likely affect other aspects of how your printer will print your labels.

1. In the Card File Command Centre, click Print Mailing Labels to open the Forms Selection window for mailing labels.

   or

   In the Sales Command Centre, click Print Invoices to open the Forms Selection window; choose the type of label you want to print from the Form Layout list.

2. Select the form layout of the labels you want to change from the Selected Form for Label list, then click the Customise button to open the Customise window.

3. Choose Forms Info from the Form menu to open the Forms Information window.

4. In the Forms Information window, change the top Margins field so it matches the location where your printer begins printing. For example, if your printer begins printing 2 centimeters from the top edge of the page, enter 2.0 in the top Margins field. When you've made your changes, click OK.

5. In the Customise window, click the Save Form As button. The Save As window appears; enter a name and a brief description for the new layout and click OK. (If you selected a custom form in step 1, click Save Form to save your changes without creating a new form layout.)