Making basic edits to a form: Sage BusinessWorks

This document provides instructions on how to delete fields or move fields to a new location on a Sage BusinessWorks Accounting form. For detailed instructions on customizing forms, select "**How do I…**" in the Maintain Forms option in each module, or click the *Electronic Info* resource bar and select *Getting Started Guide / Chapter 11 "Practicing With Custom Reports & Forms".*

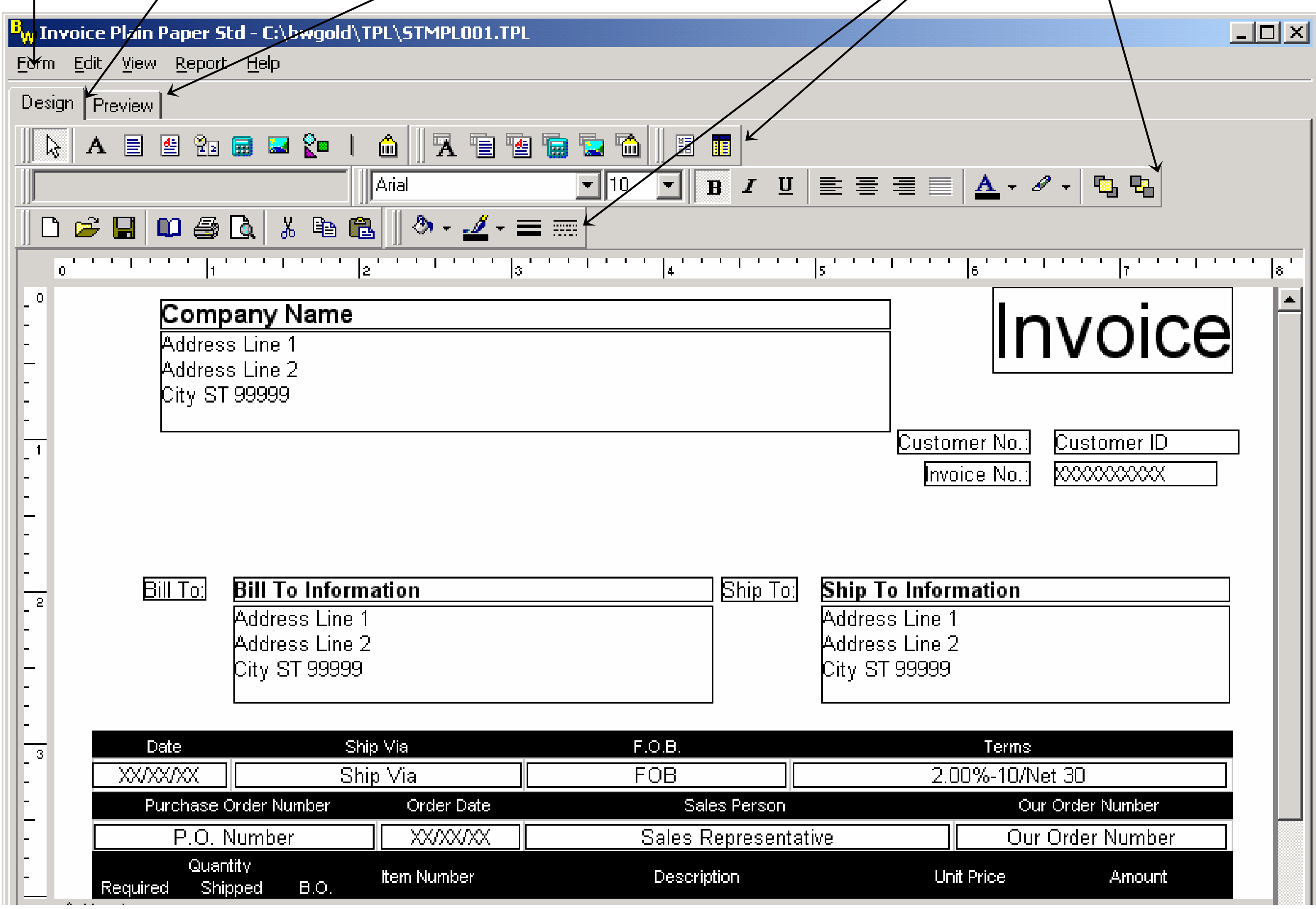
1. Select *A/R / Utilities / Maintain A/R Forms.*
2. Highlight the form that most closely meets your needs and select *Edit.* The Designer window displays.

Menu: Change page size, save changes.

Design tab: Make all modifications on this tab.

Preview tab: View the form as you make your modifications.

Toolbars: Add fields or images, change fonts or colors, add lines or boxes.

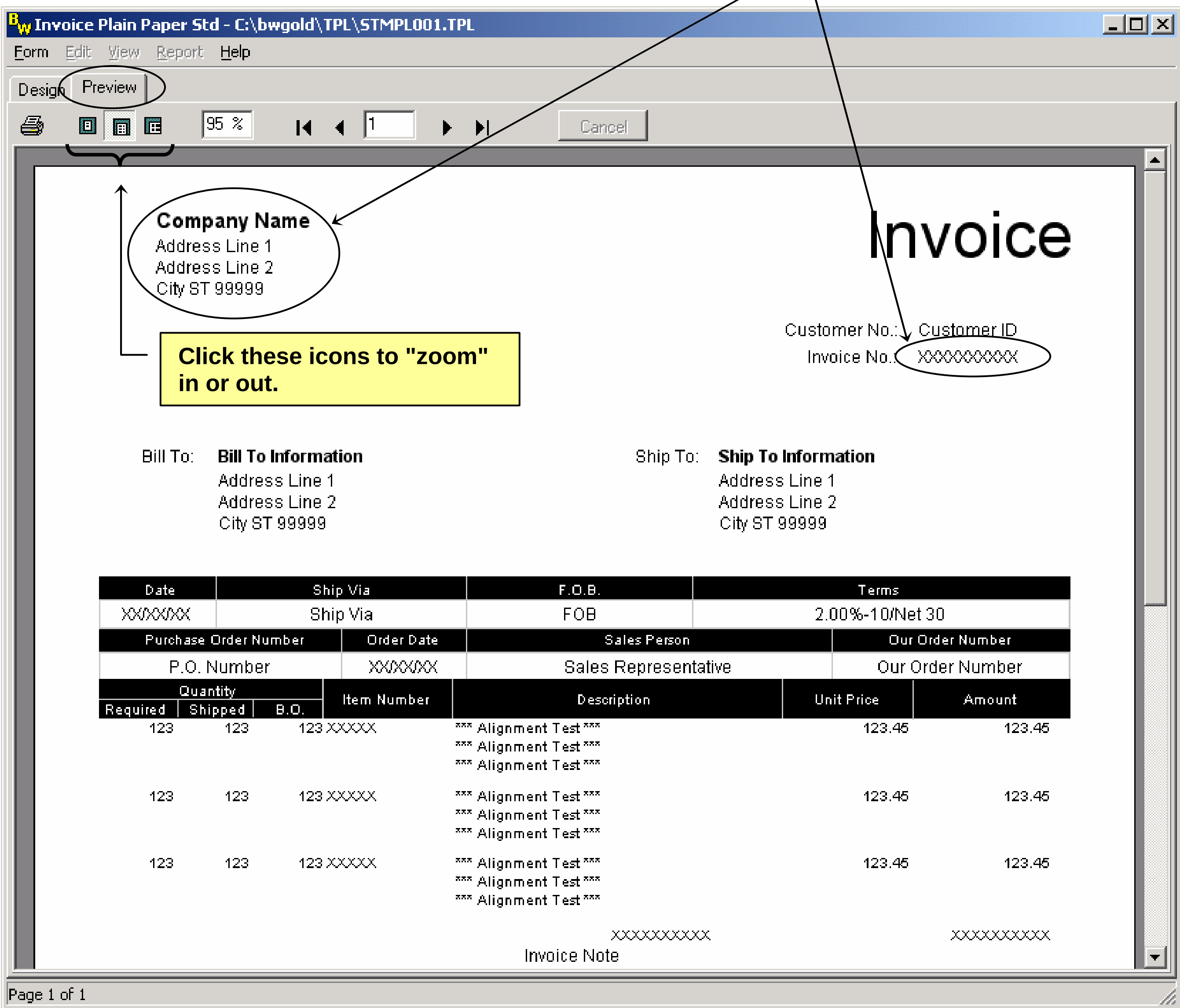


➬ To create a new custom form, it's always easiest to use a Sage BusinessWorks predefined form as a template. Select the form that looks closest to your actual invoice. If you use preprinted forms, be certain to select a form that includes the text "Pre Printed". Use forms that include the word "Tractor" only if you plan to print the form to a dot-matrix printer.

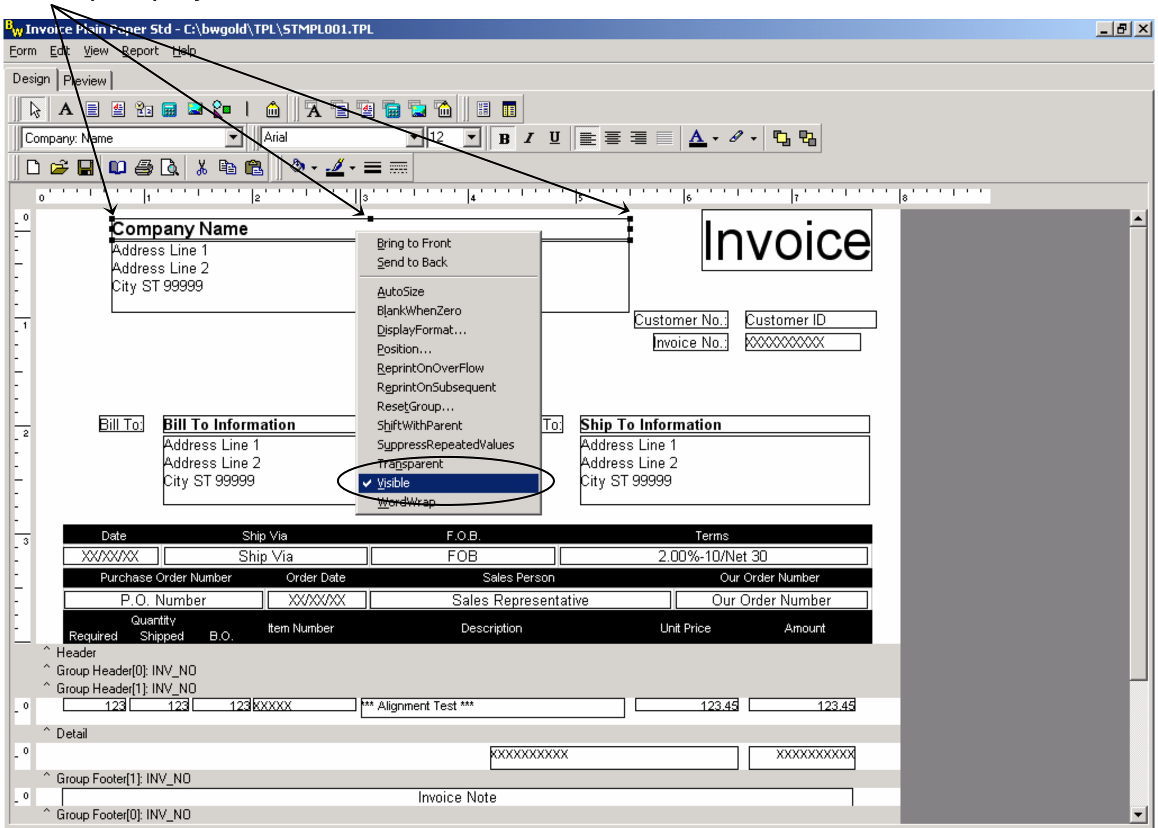
Removing fields from a form

Removing a field can cause alignment issues. Instead, leave the field in place, but make it invisible.

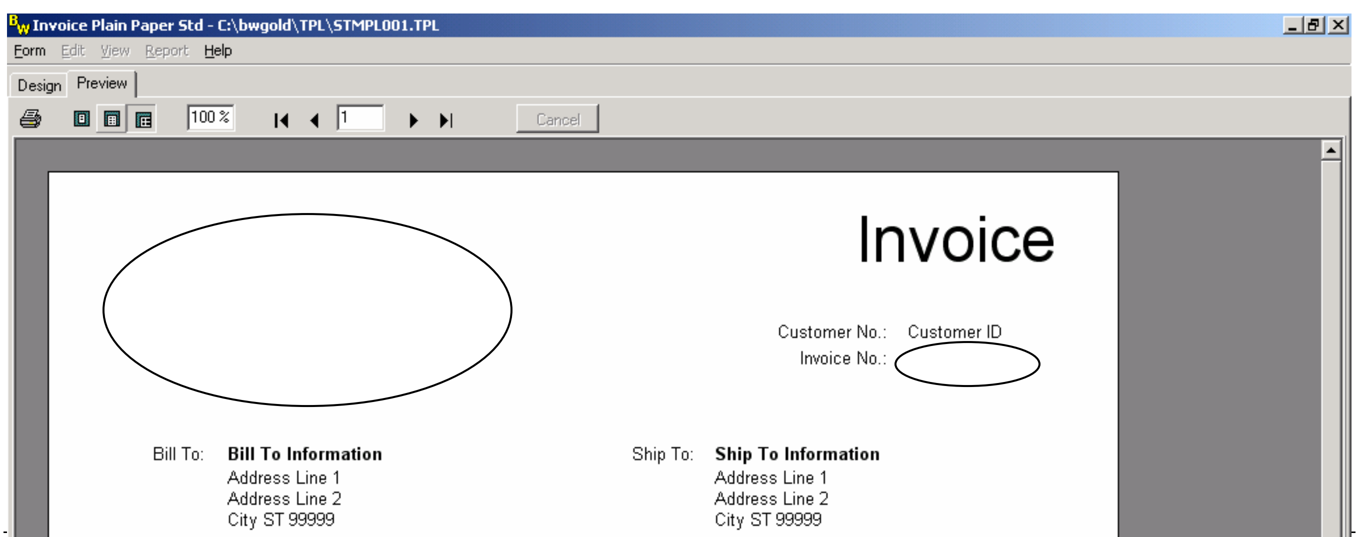
1. Click the *Preview* tab to view the form before making modifications.
   Follow the steps below to make the invoice number, company name, and company address invisible.



2. Click the *Design* tab.
3. Click the left mouse button on the Company Name field. Small black boxes (called "handles") display around the field.



4. Now, click the right mouse button to display a menu. Notice the check mark next to "Visible". Click the left mouse button on Visible to remove the check mark. (Clicking on menu items toggles them on and off.)
5. Click the *Preview* tab, and notice that the company name no longer shows.
6. Click the *Design* tab, and repeat steps 3 and 4 with the company address and invoice number fields. When you are finished, click the *Preview* tab again. Notice that the fields no longer display.



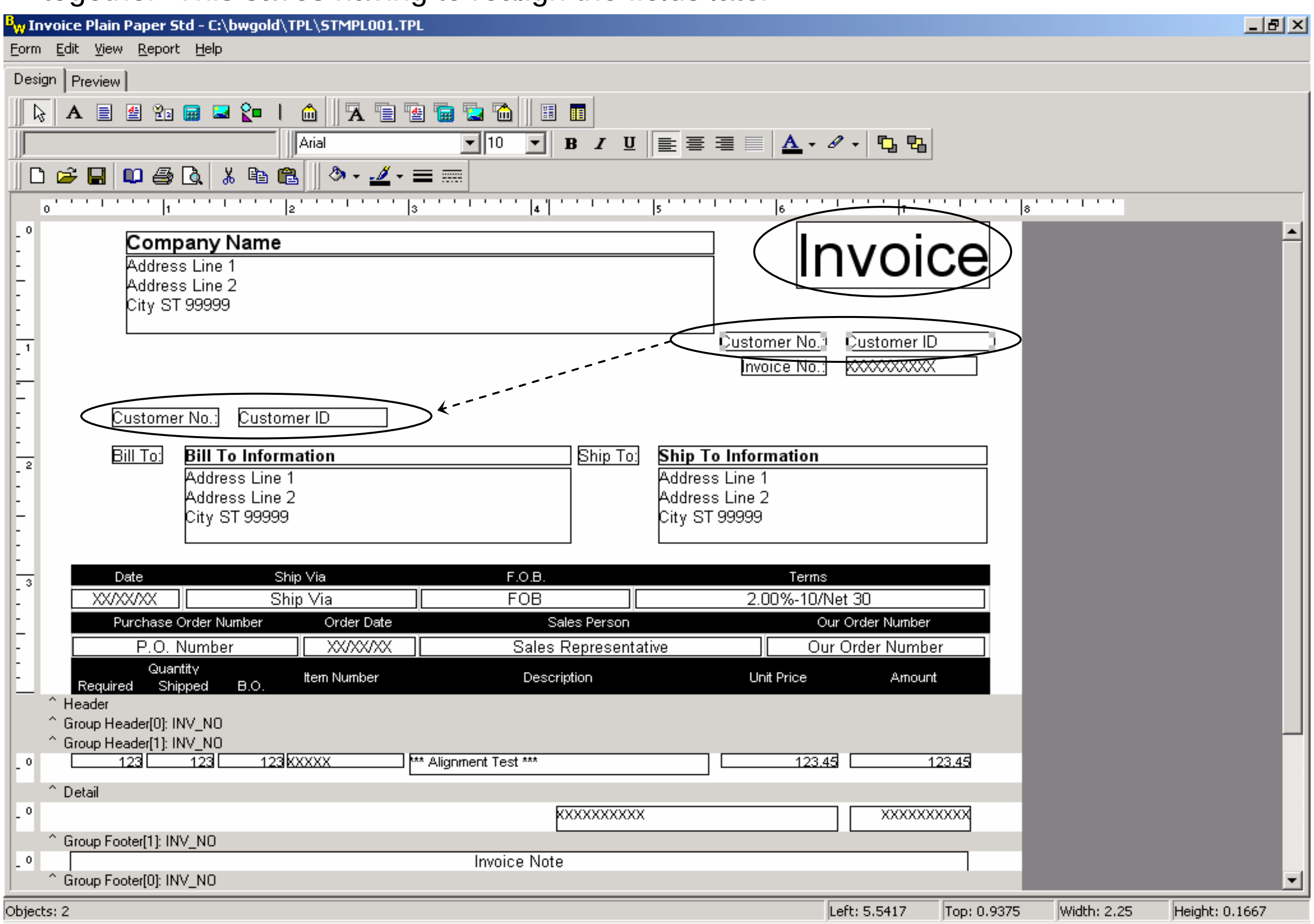
Moving a field to a new location

This exercise steps through moving the Invoice label down and moving the Customer number label and field to just above the "Bill To" address.

1. Click the *Preview* tab.
2. Left-click the "Invoice" text. (This field is a "label", meaning you can type the exact text you want to print here.) Notice that "handles" now surround the field.
3. Use either the mouse or keyboard to move the field.
   a. **Keyboard**: Hold down the shift key and repeatedly press the keyboard arrow keys. (This method works best when you are moving a field a short distance, especially when you want to maintain vertical or horizontal alignment with other fields.)
   b. **Mouse**: With the mouse over the "Invoice" label, click and hold down the left mouse button and drag the box to a new location. After moving the label, click in the white space to deselect the field. (This method works best when you are moving fields a larger distance.)

Moving two fields at the same time:

4. Left-click the "Customer No:" field.
5. Hold down the shift key, and left-click the "Customer ID" text. Notice that gray handles now surround both fields. This technique allows you to move two fields at the same time.
6. Click and hold down the left mouse button on the "Customer No:" label, and drag the fields to just above the "Bill To:" label. Notice that the label and corresponding field move together. This saves having to realign the fields later.

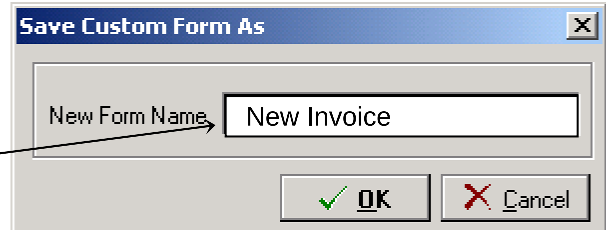


Saving changes and using the new form

After the document is customized, save the template under a new unique name. (This leaves the original form intact so that you can start over if you wish.)

Saving the form:

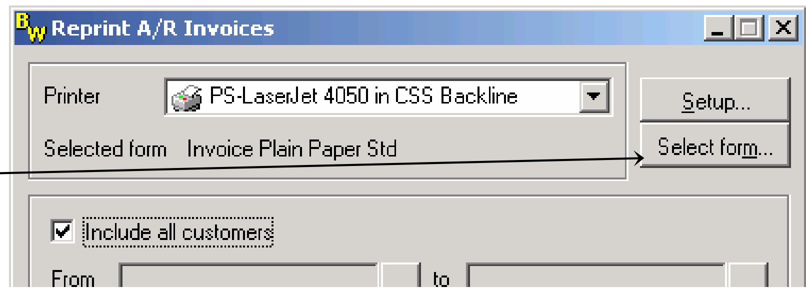
1. Select *Form / Save As*. The **Save Custom Form As** window displays.
2. Type a name for the form that is easy to recognize. In this example, the new form name is “New Invoice”.



3. Click *OK*, and then click the "X" in the upper right corner to close the form design window. Click Close to close the **Maintain Forms** window.

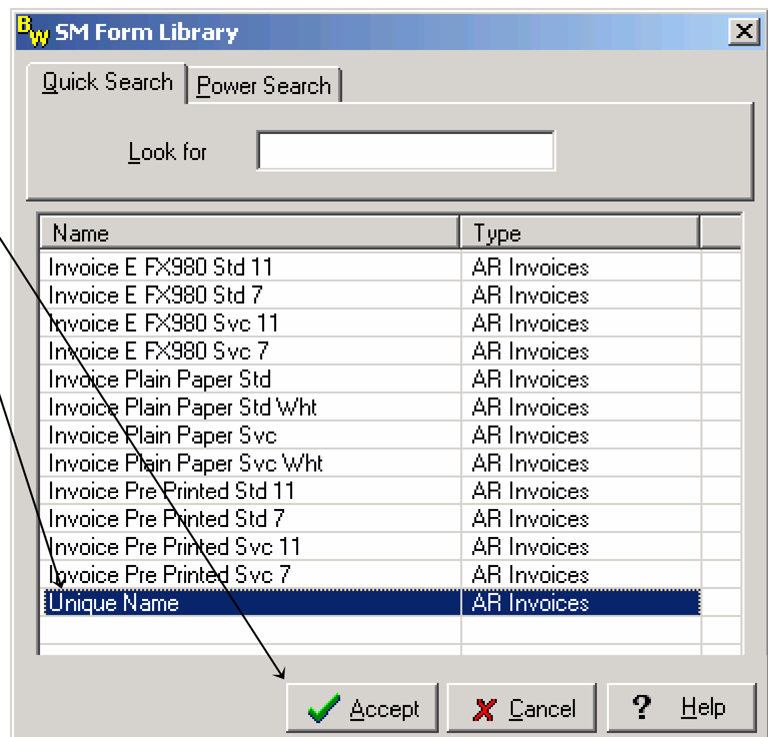
Selecting the form to print:

4. Select the form the next time you select the print option. On the form-printing window, click the *Select Form* button. (This button is at the top right of most form-printing screens.)



5. From the window displayed, select the form you saved above and click *Accept*. The form you selected now displays next to "Selected form".
6. Print the form as you normally would. (Load blank forms in the printer's paper tray if needed.)

The next time you select this form printing option, the new form shows as the default at this workstation.



Note: Form selection defaults are set at the workstation level. For this reason, to print this form at another workstation, you must select the customized form again.