

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.

The screenshot shows the Sage BusinessWorks Form Designer interface. At the top, there are four callout boxes with arrows pointing to specific parts of the window:

- Menu:** Change page size, save changes. (Points to the menu bar)
- Design tab:** Make all modifications on this tab. (Points to the Design tab)
- Preview tab:** View the form as you make your modifications. (Points to the Preview tab)
- Toolbars:** Add fields or images, change fonts or colors, add lines or boxes. (Points to the design toolbars)

The main window displays an invoice form template. The form includes the following fields and sections:

- Company Name:** Address Line 1, Address Line 2, City ST 99999
- Invoice:** Large text label on the right side.
- Customer Information:** Customer No., Customer ID, Invoice No. (with a masked field XXXXXXXX)
- Bill To Information:** Address Line 1, Address Line 2, City ST 99999
- Ship To Information:** Address Line 1, Address Line 2, City ST 99999
- Shipping and Terms:** Date (XXXXXX), Ship Via (Ship Via), F.O.B. (FOB), Terms (2.00%-10/Net 30)
- Order Information:** Purchase Order Number (P.O. Number), Order Date (XXXXXX), Sales Person (Sales Representative), Our Order Number
- Table Headers:** Quantity (Required, Shipped, B.O.), Item Number, Description, Unit Price, Amount

↳ 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.

The screenshot shows the Sage BusinessWorks form editor interface. The title bar reads "Invoice Plain Paper Std - C:\bwgold\TPL\STMPLO01.TPL". The menu bar includes "Form", "Edit", "View", "Report", and "Help". The toolbar has "Design" and "Preview" tabs, with "Preview" selected. A zoom level of 95% is shown, along with navigation arrows and a "Cancel" button.

The form content includes:

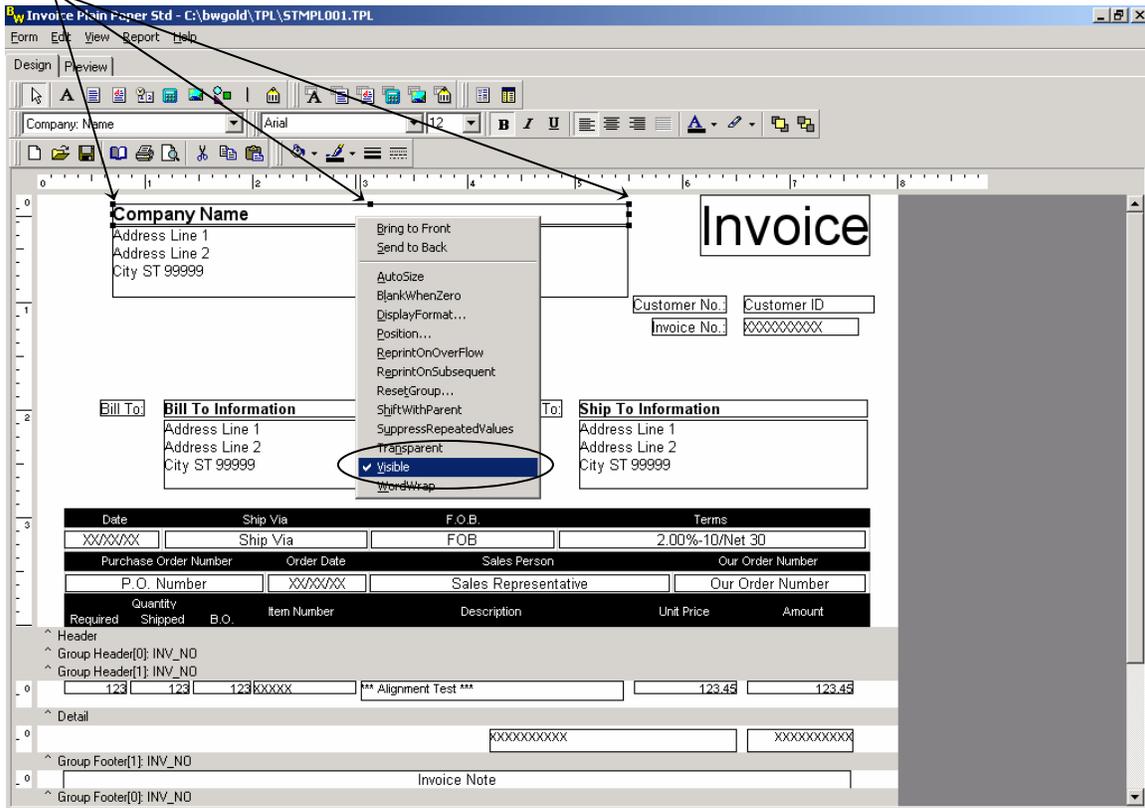
- Company Name** (circled): Address Line 1, Address Line 2, City ST 99999
- Customer ID** (circled): XXXXXXXXXXXX
- Customer No.:** XXXXXXXXXXXX
- Invoice No.:** XXXXXXXXXXXX
- Bill To:** Bill To Information, Address Line 1, Address Line 2, City ST 99999
- Ship To:** Ship To Information, Address Line 1, Address Line 2, City ST 99999
- Table 1:**

Date	Ship Via	F.O.B.	Terms
XXXXXXXX	Ship Via	FOB	2.00%-10/Net 30
- Table 2:**

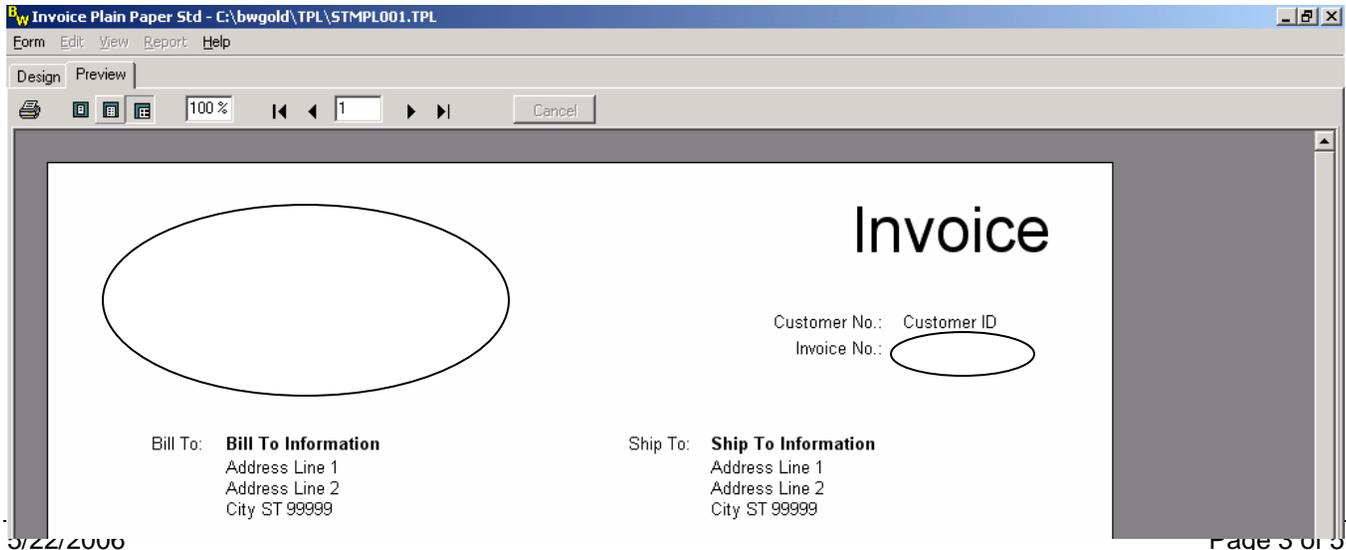
Purchase Order Number	Order Date	Sales Person	Our Order Number
P.O. Number	XXXXXXXX	Sales Representative	Our Order Number
- Table 3 (Item List):**

Quantity			Item Number	Description	Unit Price	Amount
Required	Shipped	B.O.				
123	123	123	XXXXXX	*** Alignment Test ***	123.45	123.45
				*** Alignment Test ***		
				*** Alignment Test ***		
123	123	123	XXXXXX	*** Alignment Test ***	123.45	123.45
				*** Alignment Test ***		
				*** Alignment Test ***		
123	123	123	XXXXXX	*** Alignment Test ***	123.45	123.45
				*** Alignment Test ***		
				*** Alignment Test ***		
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- Click the *Design* tab.
- Click the left mouse button on the Company Name field. Small black boxes (called "handles") display around the field.



- 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.)
- Click the *Preview* tab, and notice that the company name no longer shows.
- 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.



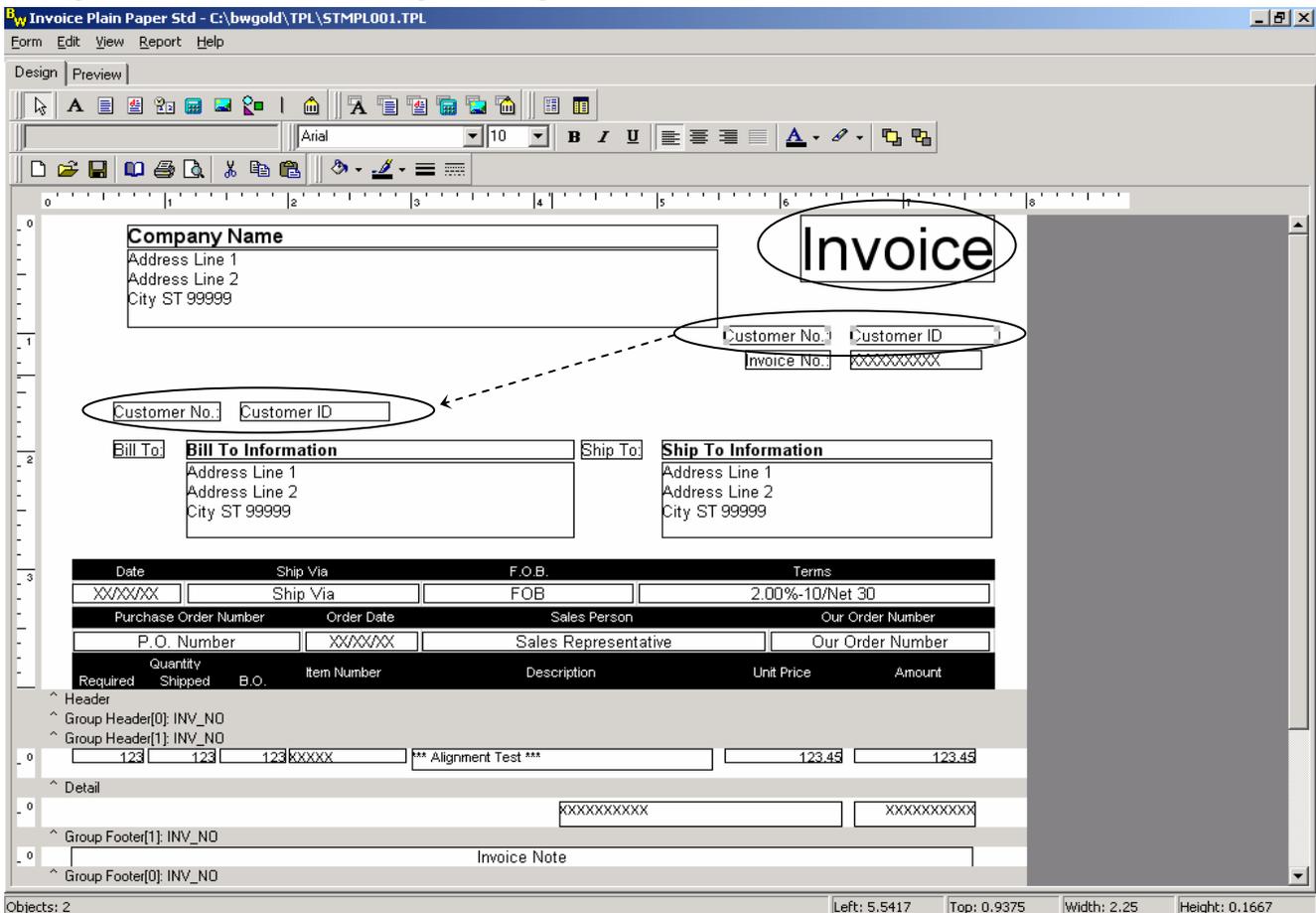
Moving a field to a new location

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.
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.

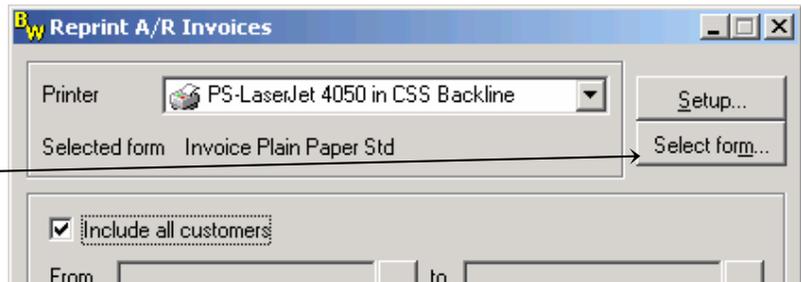
2. Type a name for the form that is easy to recognize. In this example, the new form name is "New Invoice".



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.

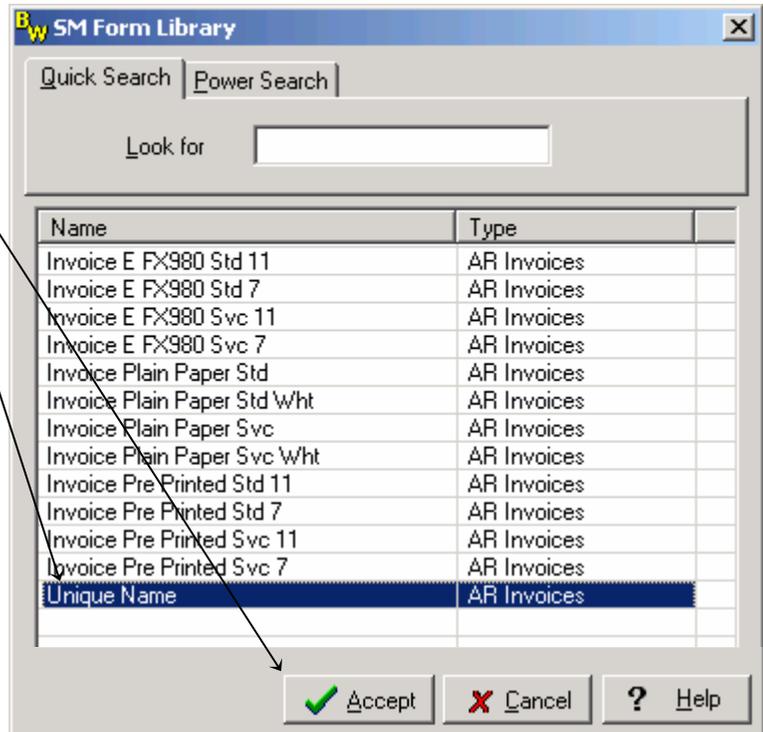
Selecting the form to print:

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.