Forms Table of Contents

Forms Overview

See also Printing Overview

See also Emailing 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 checks. In Accounting Plus, administrative documents such as mailing labels and personalized 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 customize the look of the form so they use the text styles you prefer.

Finding forms

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

Checkbook Command Center

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.

Type of Form	**To find the form, click:**
Checks	Print Checks

Sales Command Center

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
Checks	Settle Returns & Credits

Purchases Command Center

Type of Form	To find the form, click:
Purchases (item, service and professional)	Print Purchase Forms
Checks	Vendor Payments
1099 forms	Print 1099s

Payroll Command Center

Type of Form	To find the form, click:
Paychecks	Print Paychecks
W2 forms	Print W2s

Card File Command Center

Type of Form	To find the form, click:
Mailing labels	Mailing Labels
Personalized letters	Personalized Letters

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 personalize 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 personalized 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 vendors.
- 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 **customi**z**ed form** if you want to print a form you've already customized and named using the form's Customize window. Depending upon the form layout you customized, lines, columns and headings may be automatically printed with the customized form's information.
- If you're viewing the Forms Selection window for checks or paychecks, choose the **Continuous Feed Check form layout** or the **Laser Check form layout**, or a custom form you've created. The Continuous Feed Check form allows you to print checks on connected sheets of check forms; the Laser Check form allows you to print checks one page at a time on a laser printer. The Laser Check form is also set up so two check stubs are printed after the check form.(See Tips for customizing checks to learn more about customizing your checks and check 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'll be able to choose between two label forms that use metric measurements.

If you are printing one of the following forms, you may have more than one custom form.

Sales, packing slips and labels

Checks and paychecks

Statements

Purchases

Mailing labels

Click below for the step-by-step procedure:

Printing forms

Choose the information you want to print

Customize the form (optional)

Print alignment forms (optional)

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

Customizing 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.

MYOB 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 customize your 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 customizing your forms.

Click for a step-by-step procedure

Customizing forms

Step 1: Open the form in the Customize window

Step 2: Add elements to the form (optional)

Step 3: Change elements on the form (optional)

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

Step 5: Remove elements from the form (optional)

Step 6: Preview the customized form (optional)

Step 7: Save the customized form

Step 8: Print the customized form

To activate a data field

To inactivate a data field

Opening a form in the Customize window

When you first open the Customize window, several elements of the form are in view. Data fields will print information from your MYOB Accounting Plus data 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.

Click below for the step-by-step procedure:

To open the form in the Customize window

Adding a picture or logo to a form

You can add a bitmap file graphic (typically assigned the extension .BMP) in an MYOB 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 procedure. MYOB Accounting Plus can display nearly any picture that appears on the Clipboard, regardless of its original format.

Click below for the step-by-step procedure:

To add a picture or logo to a form

Printing alignment forms

Since it's important that your printed information is positioned correctly on paper forms, MYOB 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.

Click below for the step-by-step procedure:

To print an alignment form

Reviewing forms before printing

Before you begin printing, MYOB 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 shipping 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.

Click below for the step-by-step procedure:

To review forms and print them

Tips for customizing checks

Checks differ slightly from other MYOB Accounting Plus forms because check stubs are attached to them. Check stubs typically contain data fields that summarize the information that appears on the main part of the check that the stub is attached to.:In Accounting Plus, four types of check stubs exist:

- The **Regular Stub** layout is automatically assigned to checks that are written using the Spend Money window.
- The **Payable Stub** layout is automatically assigned to checks that are written using the Vendor Payments window.
- The **Paycheck Stub** layout is automatically assigned to payroll cheques that are written in the Write Paychecks window.
- The **Refund Check Stub** layout is automatically assigned to checks that are written using the Settle Returns & Credits window.

Click below for the step-by-step procedure:

To customize the stub form

Adding a check form between two stub forms

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

Click below for the step-by-step procedure:

To add a check form between two stubs

Tips for customizing 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 *primary vendor'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 customize the purchase. This section contains information about how to ensure the item numbers you want are printed on your item purchases.

Printing the primary vendor's item numbers on an item purchase

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

- A primary vendor must be assigned to the item. Primary vendors are assigned to individual items in the Primary Vendor for Reorders field in the Buying Details view of the Item Information window.
- An item number must be assigned to the item for the primary vendor. This number is entered in the Vendor Item Number field in the Buying Details view of the Item Information window.
- The primary vendor for the item must be entered in the Vendor field of the Purchases window.

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

Click below for the step-by-step procedure:

To print your item numbers on an item purchase

Tips for customizing mailing labels

MYOB Accounting Plus's mailing label forms are set up so they can be printed easily on popular mailing labels. Depending upon the system of measurement your computer uses, you can select from a set of measured form layouts. For example, if your computer is set up to track metric measurements, you can choose between 2.75" by 4.25" and 2.875" by 1"mailing label form layouts. If your computer is set up to track inches, the form layouts you can choose from will appear in inches in the Forms Selection window for mailing labels.

Click below for the step-by-step procedure:

To change the size of your labels

Changing the position of your labels

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

Click below for the step-by-step procedure:

To change the position of your labels

Forms Overview

Note: You may have more than one custom form for your forms See Customizing forms to learn how to use the Customize window to personalize the look of your printed forms. **Note: Decide whether you need to customize the form** If the preprinted forms you currently use don't match the form layouts provided in Accounting Plus, you'll need to customize the form layouts for each form that doesn't match your preprinted forms. **Note: If you want two stubs below a check** If you want two stubs to be printed after the check form is printed, you simply need to choose the Laser Check selection from the Selected Form for Checks list at the bottom of the Forms Selection window for checks before you print the check forms. You don't need to follow these instructions.

Step 1: Choose the information you want to print

Step 1 > 2 > 3 > 4

To choose the information you'll print

If you haven't already read the Forms Overview, see Printing forms 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 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: Customize the form (optional)

Step 1 > 2 > 3 > 4

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

Click below for the step-by-step procedure:

Customizing forms

Step 3: Print alignment forms (optional)

Step 1 > 2 > 3 > 4

To print an alignment form

If you haven't already read the Forms Overview, see Printing alignment forms 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 customize 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 through 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

Step 1 > 2 > 3 > 4

To review forms and print them

If you haven't already read the Forms Overview, see Reviewing forms before printing 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 Preparing your computer for more information about printer drivers.

Step 1: Open the form in the Customize window

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

To open the form in the Customize window

If you haven't already read the Forms Overview, see Customizing forms and Opening a form in the Customize window for more information.

1. Open the Forms Selection window for the form you want to customize. See Finding forms to learn how to do this.
2. Make selections and entries so that you start the customization 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 Customize.

Step 2: Add elements to the form (optional)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

Click the element you wish to add:

To add a text field to a form

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

The customize window for the form you want to customize 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 Customize 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 to learn about changing the size of a text field.

To draw a line on a form

The customize window for the form you want to customize 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 customize window for the form you want to customize 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 for more information.

The customize window for the form you want to customize 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 Customize 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 Customize 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 Customize 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 and To copy and paste a data field. To view all of the fields -- both active and inactive -- that are available on a form display the Customize window for that form. If you need help doing this, see Open the form in the Customize window.

To activate a data field

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

The customize window for the form you wish to customize 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 Customizing forms for more information.

The customize window for the form you wish to customize 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 Customize window.
4. Choose Paste from the Edit menu. A copy of the data field will appear in the 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 customized item sale, but you can't copy a data field from an sale form to a statement form.

Step 3: Change elements on the form (optional)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

Click the element you wish to change:

To change the size of a data field, text field, rectangle or picture
To change the length of a line
To change the text in a text field
To change the font characteristics of a data field or text field on a form
To change the orientation of a line
To change the thickness of a line or rectangle
To change the size of a picture or logo

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

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

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

There are two ways to change the size of a data field or text field in the Customize 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 Customizing forms for more information.

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

There are two ways to change the length of a line in the Customize 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 Customizing forms for more information.

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

1. Double-click the text field in the Customize 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 Customizing forms for more information.

The customize window for the form you wish to customize 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 Customizing forms 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-customized forms

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

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

1. Double-click the line in the Customize 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 Customizing forms for more information.

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

1. Double-click the line or rectangle in the Customize 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 Customizing forms for more information.

The customize window for the form you wish to customize 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.

Customizing forms - Step 3

Idea: Other ways to change fonts You can change the default font that appears on every non-customized 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-customized forms 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 for a step-by-step procedure.

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

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

Click the element you wish to move:

To move a data field or text field
To move a line
To move a rectangle or picture

To move a data field or text field

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

The customize window for the form you wish to customize 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 Customizing forms for more information.

The customize window for the form you wish to customize 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 Customizing forms for more information.

The customize window for the form you wish to customize 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.

Customizing forms - Step 4

Step 5: Remove elements from the form (optional)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

Click the element you wish to remove:

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

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

The customize window for the form you wish to customize 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 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 Customizing forms for more information.

The customize window for the form you wish to customize 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 customized form (optional)

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

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

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

To preview the customized 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 customized form

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

To save the customized form

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

The customize window for the form you wish to customize 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.

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 data 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 customized form

Step 1 > 2 > 3 > 4 > 5 > 6 > 7 > 8

To print the customized form

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

Customizing forms - Step 7

To customize the check form

If you haven't already read the Forms Overview, see Tips for customizing checks for more information.

1. Open the check form you want to modify using the Customize window. (See To open the form in the Customize window if you need to learn how to do this.) Notice that only the fields for the check, not for the stub, appear in the window
2. Open the Form menu at the top of your computer screen; notice that the Check Layout command is selected. This indicates that you're currently viewing the layout for the check form only.
3. Customizing the check form is the same process as customizing 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 check form. If you need help, see Customizing forms for more information about making basic changes to your forms.

To customize the check form

Note: An entire check form has two parts An entire check form has two parts-the check form and the stub form. To customize the entire check form, you'll need to perform two separate tasks: customize the check form and customize the stub form.

To customize the stub form

If you haven't already read the Forms Overview, see Tips for customizing checks for more information.

1. If it's not already displayed, open the check form you want to modify using the Customize window. (See To open the form in the Customize window if you need to learn how to do this.) Notice that only the fields for the check, not for the stub, appear in the window.
2. From the Form menu, choose the type of stub you want to customize. When you select a stub type, the check form's fields will be dimmed, and the appropriate stub form's fields will appear at the bottom of the Customize window. (You may need to use the scroll bar on the right side of the Customize window to view the stub's fields.)
3. After you've selected the stub you want, customizing the stub form is the same process as customizing 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 check stub at this time. If you need help, see Customizing forms for more information about making basic changes to your forms.

4. If you want, you can make changes to all four available check 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.
5. When you're finished making changes to the check form and stub forms, click Save Form in the Customize 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.

To customize the stub form

Note: An entire check form has two parts. An entire check form has two parts-the check form and the stub form. To customize the entire check form, you'll need to perform two separate tasks: customize the check form and customize the stub form. **Note: Getting back to the check form** When a stub form is displayed in the Customize window, the fields and other items that make up the check form aren't accessible. If you need to make changes to the check form again, choose Check Layout from the Form menu. **Idea: Preview your forms** Remember that you can preview the changes you make at any time by clicking the Preview button in the Customize window. **Idea: Don't waste your check forms!** After you're satisfied with the changes you've made to your checks and check stubs, consider printing some alignment checks to verify whether the changes you made print correctly on your printer. Print alignment checks by clicking the Print Alignment Check(s) button in the Forms Selection window.

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

To add a check form between two stubs

If you haven't already read the Forms Overview, see Adding a check form between two stub forms for more information.

1. In the Checkbook Command Center, click Print Checks to open the Forms Selection window for checks.
2. In the Forms Selection window, choose Laser Check from the Selected Form for Checks list at the bottom of the window, then click the Customize button. The Customize window appears.
3. From the Form menu, choose the stub form you want to include with the check. 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 customizing the Laser Check form layout, two stubs appear in the Customize window-that's okay; you'll be using both stubs.
4. Select all the items on the *first* check 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.
5. Drag the selected stub's items to the proper position in the Customize window. Use the rulers and the dimmed check 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 check form, and the Customize window will look a little confusing for the time being.)
6. Choose Check Layout from the Form menu. Both stubs will disappear, leaving the check form's fields alone in the Customize window.
7. Choose Select All from the Edit menu to select all the check form's items.
8. Using the rulers as a guide, drag the check form's items into the proper position in the center of the Customize Checks window. (You may find it handy to verify the location of the check 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 Check Layout from the Form menu again.)
9. After you've positioned the check form correctly, choose the stub layout you're customizing from the Form menu, then click the Preview button. The layout of the check 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 check stubs or check form until all items on the entire form are positioned the way you want, then click Save Form in the Customize 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.

To add a check form between two stubs

Warning: Be careful selecting items on the stub! Don't use the Select All command to select all the items on the first check stub; you'll mistakenly select all the fields on both the stubs. **Note: Be sure to change all the stubs you'll use with this form** Every custom check form you create has four check stub forms associated with it: Regular, Payable, Payroll Check and Refund. If you're planning to use your custom check form to print multiple types of checks -- payable and refund checks, for example -- be sure to modify all the appropriate stub form layouts.

The Regular Stub layout is automatically assigned to checks that are written using the Spend Money window. The Payable Stub layout is automatically assigned to checks that are written using the Vendor Payments window. The Refund Check Stub layout is automatically assigned to checks that are written using the Settle Returns & Credits window. The Paycheck Stub layout is automatically assigned to paychecks written using the Write Paychecks window.

To print your item numbers on an item purchase

If you haven't already read the Forms Overview, see Tips for customizing purchases for more information.

1. In the Purchases Command Center, click Print Purchase Forms 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 Customize button at the bottom of the window. The Customize window appears.
5. Scroll through the window until you locate the field labeled [Vendor'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 Vendor's Item # field.
6. Unmark the Field is Active selection. The Vendor's Item # field is now inactive on the item purchase.
7. Scroll through the Customize window again until you locate the field labeled [My Item #]. (This field is usually located on the far right edge of the Customize 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 Vendor'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.)

To print *your* item numbers on an item purchase

To change the size of your labels

If you haven't already read the Forms Overview, see Tips for customizing mailing labels for more information.

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 Center, click Mailing Labels to open the Forms Selection window for mailing labels.
2. In the Forms Selection window, choose the form layout of the mailing labels you want to change, then click the Customize button to open the Customize 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 Customize 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.)

To change the size of your labels

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 mailing labels are printed using your printer.

To change the position of your labels

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

1. In the Card File Command Center, click Mailing Labels to open the Forms Selection window for mailing labels.
2. In the Forms Selection window, choose the form layout of the mailing labels you want to use, then click the Customize button to open the Customize 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 inches 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 Customize 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.)

To change the position of your labels

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.