

# Advanced Form Customization

If you know exactly how you want your business forms to look and don't mind detail work, you can mold the form templates you use into whatever you want. With QuickBooks' Layout Designer tool, you can exert total control over form templates—whether you use an existing template as your canvas or start from scratch.

As you learned in Chapter 25, QuickBooks gives you several form-customizing tools. You can change the basic look and feel of your forms and choose some of the fields that appear on forms with either a form design or the Basic Customization (page 634) and Additional Customization (page 637) dialog boxes. If those tools don't offer the type of fine-tuning you have in mind, Layout Designer lets you add fields, labels, and graphics to forms; position objects exactly where you want them; and format the results however you please.

Most of the time, an existing form template is the quickest path to a customized form, since at least *some* objects should be ones you want, even if they aren't exactly where you want them. But you can start with a blank slate if you're setting up a business form with a truly revolutionary layout. This appendix explains both methods.

## Laying Out Forms

When you want a form to look just so, Layout Designer is the tool to use. Once you master the art of selecting objects (labels, fields, and images) on forms and dragging sides or whole objects, you'll be amazed at how quickly you can design forms. And Layout Designer goes beyond dragging and dropping objects; work its other commands into your repertoire to finish your forms even faster—or spend the time you save making your forms even better.

Here's how you get to Layout Designer:

1. When a form window (like Create Invoices) is open, in the window's toolbar, click the arrow next to the Customize command and then choose Manage Templates.

The Manage Templates window opens.

2. In the Select Template list, choose the template you want to edit and then click OK.

The Basic Customization dialog box opens.

3. At the bottom of the dialog box, click Layout Designer.

Voilà! The Layout Designer dialog box opens with the name of the selected template in the title bar.

Laying out a form is a combination of zeroing in on areas to position objects and then viewing the entire form to see whether it's readable and reasonably attractive. As you work, you can zoom in and out any time you want. To do that, in Layout Designer's icon bar, simply click In or Out.

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**Note:** As with any kind of design, laying out forms can be fraught with choices that don't work out. If you make changes you don't like, click Undo to reverse your previous actions (if you're more of a keyboardist, press Ctrl+Z instead). If you change your mind, click Redo to put back the action you just undid. And it's always a good idea to create a copy of the form (page 640 in Chapter 25) before you begin surgery.

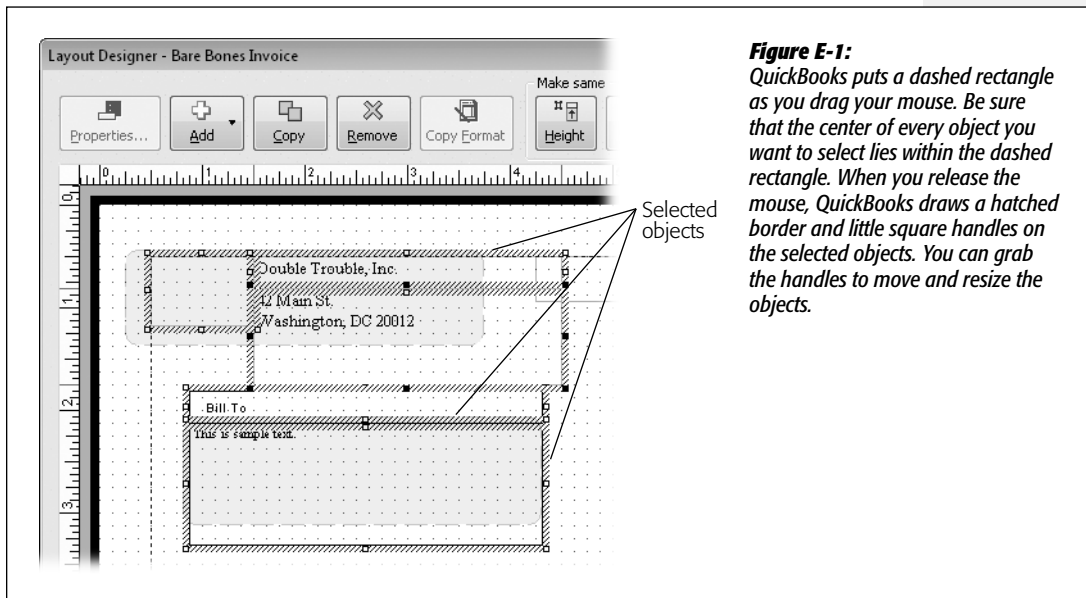
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## Selecting Form Objects

Laying out a form means moving, resizing, and formatting the objects on it. Before you can do any changing, you first have to select the objects you want to modify. QuickBooks displays a hatched border around selected objects, as shown in Figure E-1.

You can use any of the following methods to select objects:

- **One object.** Click the object. For example, to select the company's name, click the company name text. To select one of the columns in a form table, click anywhere within the column.
- **Multiple objects.** Shift-click each object you want to select.
- **Objects within an area.** Drag the mouse from one corner of the area to the opposite corner.



**Figure E-1:** QuickBooks puts a dashed rectangle as you drag your mouse. Be sure that the center of every object you want to select lies within the dashed rectangle. When you release the mouse, QuickBooks draws a hatched border and little square handles on the selected objects. You can grab the handles to move and resize the objects.

## Moving and Resizing Objects

You don't have to stick with the size and placement QuickBooks gives fields. For instance, if your company name and address fit in a narrow space, you can resize the boxes for those fields, which might make room for your company telephone number and email address. Figure E-1 shows part of Layout Designer's icon bar, which includes commands for working with template objects.

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**Note:** If most of the icons on the icon bar are dimmed, don't panic. That's just QuickBooks way of telling you that you haven't selected any objects. The only icons that are always available are Add (shown in Figure E-1), Redo, In, and Out (not shown in the figure).

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### Moving objects

You can move one or more objects at a time. To do that, select the objects you want to move (by clicking, Shift-clicking, or dragging a selection box, as explained in the list above). Use one of the following methods to move the objects you selected:

- **Drag.** Click anywhere within one of the selected objects' boundaries and drag it to a new position.
- **Center the selected objects horizontally in the form.** Select the objects and then, in the Layout Designer's icon bar, click the Horz button.

- **Fine-tune object position.** Select the objects, and then press an arrow key to move them 1 pixel in that direction. If you have one or two objects to position precisely and you don't have to move them far, using the arrow keys saves you the trouble of turning grid snapping on and off (see the box on page 5, which explains another way to place objects precisely).

## Resizing objects

Each selected object has six square handles you can drag to change the object's height, width, or both. Use one of the following methods to resize objects:

- **Drag.** Select an object and then drag one of the handles until the object is the size you want. (When you resize a logo, QuickBooks maintains the original height-to-width ratio so that your resizing doesn't distort the logo by stretching it more one direction than the other.)
- **Resize the columns in a table.** Columns are inextricably linked to each other: If you widen one column, you narrow the next. To resize a column and its neighbor, in the Layout Designer window, click within the table. Next, position your cursor over the border of the column (it changes to a two-headed arrow), and then drag to move the border.

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**Note:** Dragging the edge of a column that also happens to be the edge of the table changes both the width of the table *and* the width of the column. If you want to fit columns to a different table width, drag the edge of the table first to resize it, and then resize the columns in the table.

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Dragging object handles is easy, but you can resize only one object at a time. In addition, forms look better when you keep related fields in boxes that are the same size. Layout Designer's toolbar includes a few buttons you can use to change objects to match the size of another object on the form. In the Layout Designer window, Shift-click each object you want to resize, and then Shift-click the correctly sized object (be sure to choose the correctly sized object *last*). Then use these commands to match the target object's dimensions:

- **Height** changes the height of the selected objects to the height of the last object you selected.
- **Width** changes the width of the selected objects to the width of the last object you selected.
- **Size** changes the height *and* width of the selected objects to match the last object you selected.

After QuickBooks resizes the objects, they might not line up with their neighbors anymore. To fix that, simply select the objects that are out of position and drag them into place.

## POWER USERS' CLINIC

**Changing Layout Designer's Grid**

The human eye picks up even the tiniest errors in alignment, so if the boxes, text, and images on your forms aren't perfectly lined up, they'll look sloppy and unprofessional. Fortunately, Layout Designer includes a grid that helps you align objects.

As you move and resize objects on a form, QuickBooks snaps their edges to *grid points*, dots that indicate the intersections on the grid. QuickBooks starts out with a 1/16" grid, but you can change the grid's spacing to anything from 1/16" up to 3/8". The wider the grid, the easier it is to see that you've snapped to the right grid point, but the less flexibility you have in positioning objects. To position elements more precisely (like your logo), you can turn grid snapping off entirely.

Here's how to manage Layout Designer's grid:

1. To change the grid or turn off grid snapping, at the bottom of the Layout Designer window, click Grid. QuickBooks opens the "Grid and Snap Settings" dialog box.
2. If you want to change the spacing between grid points, in the "Grid spacing" drop-down list, choose the spacing you want.
3. To kill grid snapping, turn off the "Snap to grid" checkbox. For example, you might turn off grid snapping while you position one or two objects, and then turn it back on to align text and boxes.
4. Click OK.

If you don't want to see the grid, in the "Grid and Snap Settings" dialog box, turn off the "Show grid" checkbox.

**Adding, Removing, and Copying Objects**

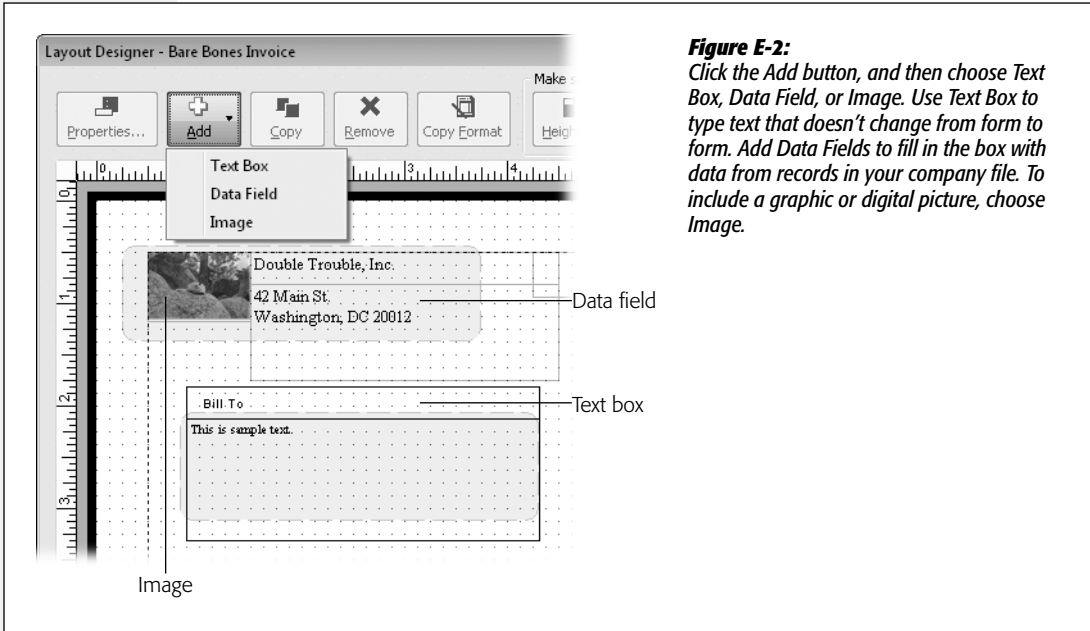
In the Additional Customization dialog box (page 638 in the printed copy of your book), you can work with only the fields that QuickBooks displays on the window's tabs. But in Layout Designer, you can add just about any company or customer field you want by using the buttons for adding, removing, and copying objects.

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**Note:** You can't use standard Windows keyboard shortcuts like Ctrl+X, Ctrl+C, and Ctrl+V to remove, copy, and paste objects in Layout Designer.

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The Add button lets you add text boxes, data fields, and images to a form, as Figure E-2 shows.

**Figure E-2:**

Click the Add button, and then choose Text Box, Data Field, or Image. Use Text Box to type text that doesn't change from form to form. Add Data Fields to fill in the box with data from records in your company file. To include a graphic or digital picture, choose Image.

In Layout Designer, when you click Add and then choose one of the object types, QuickBooks opens the corresponding dialog box. Here's what each one does:

- **Text Box.** QuickBooks opens the Properties dialog box. Your choices are simple. In the Text box, type the text you want. You can set the text's horizontal and vertical justification (great for lining up labels with data), its font and color, and the border and background of the box itself.
- **Data Field.** QuickBooks opens the Add Data Field dialog box. Click a field's name in the list, and then click OK. The program adds a text box with the field's name as its label and a data field box in the middle of the form. Drag the box where you want it. You can format box's text, border, and background (see page 7).
- **Image.** QuickBooks opens the Select Image dialog box. Find the image file you want and then double-click it to add it to the form (or select it and then click Open). QuickBooks displays a message telling you that it's copying the file to the image folder for your company file.

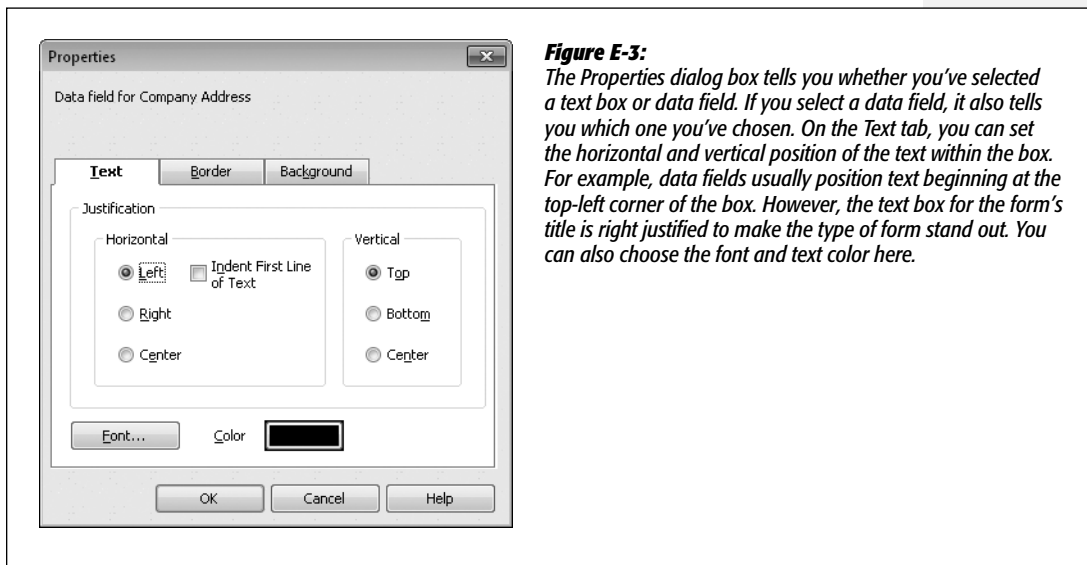
To remove an object from the form, select that object and then, in the window's icon bar, click Remove. Unlike the Add command, Remove deletes only the objects you choose, not the pairs of label and data field objects.

Copying an object is easy: Just select the object and then click Copy. QuickBooks copies the selected objects and places the copies slightly offset from the originals.

Copying is useful when you want to add several labels of the same size. You can add the first text box and make it the size you want, and then copy that text box for all your labels. After the text boxes are in position, you can edit the text of each label.

## Formatting Forms

You can format text boxes and data fields to spice things up. In addition to all the typical font formats for text, you can add or remove borders around boxes and choose background colors to emphasize information. To make changes like these, in the Layout Designer window, select the object that you want to format and then click Properties, or simply double-click the object. Figure E-3 shows what you can do to data fields and text boxes.



**Figure E-3:**

*The Properties dialog box tells you whether you've selected a text box or data field. If you select a data field, it also tells you which one you've chosen. On the Text tab, you can set the horizontal and vertical position of the text within the box. For example, data fields usually position text beginning at the top-left corner of the box. However, the text box for the form's title is right justified to make the type of form stand out. You can also choose the font and text color here.*

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**Tip:** Removing *all* the lines from an invoice is a printing feature, not part of customizing a form. To prevent lines from printing around invoice fields (perfect when you use Intuit's preprinted forms that already have lines), choose File→Printer Setup. In the "Printer setup" dialog box, turn on the "Do not print lines around each field" checkbox at the bottom of the Settings tab.

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In the Properties dialog box, click the Border tab to add or remove borders around the box. You can add a border to one or all of the box's sides, and you can choose from four line patterns and four thicknesses. You can also round the corners of boxes to make them a bit more stylish.

For background colors, all you have to do is turn on the Fill Background checkbox and then choose the color you want. If you don't use a color printer, you can still choose shades of gray to make fields stand out.

If you apply several formats to one object and then decide you want other objects to look the same way, you can copy formatting between objects. Here's how:

1. **Select the object with the formatting you want.**

QuickBooks displays the object's handles and borders.

2. **Click the Copy Format button.**

The button's label changes to "End Format" and your cursor changes into a paintbrush.

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**Note:** Don't select more than one object, because that grays out the Copy Format button.

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3. **Click each object that you want to reformat.**

QuickBooks changes the formatting of each object you click.

4. **When you're done, click End Format.**

The cursor changes back to a selection arrow and the button's label reverts to "Copy Format".

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**Note:** Unless you print forms on a color printer, don't bother choosing colors for text, borders, and backgrounds.

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## Other Handy Layout Tools

QuickBooks has a couple more Layout Designer features up its sleeve, which are all worth knowing about:

- **Show envelope window.** If you print forms to stuff into Intuit's window envelopes, turn on this checkbox. QuickBooks then displays blue boxes where the windows on Intuit's standard window envelopes appear. If you move the Company and Bill To Address fields so they appear within the blue areas, you'll be able to mail the envelope without printing separate mailing labels. (You can't move the blue areas, so this feature won't help if you use another brand of envelopes with windows in different positions.)
- **Margins.** The faint dashed rectangle around the edge of the Layout Designer window shows the current margin settings. To set margins for your form, at the bottom of the window, click Margins. You can make margins as wide as you want, but you can only make them as narrow as the margin settings for your printer.



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**Note:** Many printers can't print closer than one quarter of an inch from the edges of the paper. If you're determined to squash as much information as possible onto a form and set margins that are too narrow for your printer, QuickBooks warns you that the margins won't work based on the printer you designated for that type of form in Printer setup (page 310).

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## Creating a New Template

For radically different forms, it just might be easier to start from scratch. If you're prepared to add, position, and format all the fields yourself, follow these steps:

1. **In the main QuickBooks window, choose Lists→Templates to open the Templates window.**

QuickBooks opens the Templates window.

2. **Press Ctrl+N or click the Templates button, and then choose New.**

QuickBooks opens the Select Template Type dialog box.

3. **Click the option for the type of form you want to create.**

You can choose Invoice, Credit Memo, Sales Receipt, Purchase Order, Statement, Estimate, or Sales Order as your basic template types. (Sales Order is available only in QuickBooks Premier and QuickBooks Enterprise.) Each type of form has its own collection of typical fields, which QuickBooks adds to the tabs in the Customize <template type> dialog box. For example, when you select Estimate, the Estimate Number field is already turned on and you can include the project or job name.

4. **Click OK.**

The program opens the Basic Customization dialog box with the typical fields for that type turned on.

5. **To name the template, click the Manage Templates button.**

QuickBooks automatically names the new form something like New Invoice Template. To give it a more meaningful name, click the Manage Templates button. In the Manage Templates dialog box that appears, the new form is selected. In the Template Name box, type a new name for the template. Go with a name that tells you something about the template: the type of form, whether it focuses on services or products, and any other hints to help you choose the template you want. For example, if you create an invoice template that you email to customers, name it something like Invoice Email.

When you're done entering the name, click OK to return to the Basic Customization dialog box, where the new name now appears below the Selected Template label.

**6. Customize the form.**

As you would for a template you're editing, make changes in the Basic Customization dialog box; click Additional Customization or Layout Designer to change even more aspects of it.

**7. When the new template looks good, click OK.**

The Basic Customization dialog box closes.

The new template appears in the Templates list and in any drop-down list of templates, like the Template box in the Create Invoices window.