Chapter 15
Customizing Forms
Customizing Forms


You have used many different kinds of forms: invoices, statements, checks, etc. There may be times when you want to create your own form or customize one of the formats that come with Peachtree. You can customize forms with Peachtree’s forms designer.
Software Objectives, p. 595

1. Define Peachtree forms.
2. Customize a form (invoice).
3. Print a practice forms.
4. Use design tools.
5. Use the Financial Statement Wizard.
Web Objectives, p. 595

- Use your Internet browser to go to the book’s website at [www.mhhe.com/yacht2008](http://www.mhhe.com/yacht2008).
- Use a word processing program to write summaries of the websites that you visited.
There are three types of documents that can be accessed from the Reports menu:
a. Reports
b. Financial Statements
c. Forms
What is a form? pp. 596-597

A form in Peachtree is a document that you exchange with customers, vendors, or employees. The forms that come with Peachtree include checks, tax forms, invoices, statements, mailing labels, quotes, and collection letters.

Read pages 596 and 597.
You use the sample company, Bellwether Garden Supply, to complete Chapter 15. You can restore any backup from Chapters 1 – 7.

If you do not have a backup of Bellwether Garden Supply, install the starting data for the sample company by restoring the bgs.ptb file. Detailed steps for restoring the bgs.ptb file are on pages 24-28.
Chapter 15 topics

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Chapter 15 topics (concluded)

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Getting started, pp. 597-598

- Complete steps 1 and 2 on page 597.
- Complete step 3 on page 598.
From the Navigation Bar, select **Customers & Sales**. Link to **View All Customer & Sales Reports**. Select the **Forms** tab. In the Forms list, select **Invoice**.
Click **Customize**. The Invoice window appears.

Read page 599. Complete steps 6–13 pp. 600-601.
Save As window, p. 602

After completing step 13 on page 601, the Save As window appears.

Click Save ; then Close .
Forms tab, p. 602

After completing step 14 on p. 602, Practice is shown on the Forms list. Select Practice.

Click **Preview and Print**.
Read step 1 on p. 603. Complete steps a. through e. The Preview and Print Invoices and Packing Slips window appears.
After completing step 1, a.-e., on page 603, click . Bellwether’s customized invoice appears. (A partial invoice is shown.)

Click to print Invoice No. 103. Read step 3 and 4 on page 604. Close the Select a Report or Form window.
Editing a Form Design, p. 605

- Complete steps 1-6 on page 605.

- Save the form. Use the file name, Practice.
Design Tools, Object Toolbar, and Formatting Toolbar, pp. 605-606

- Read pages 605-606.
Financial Statement Design Tools (continued), pp. 608-609

Read pages 608-610.
Complete steps 1, 2, and 3 on pp. 610. The Financial Statement Wizard – Introduction window appears.

Click <Next>.
After completing step 4 on p. 611, the Financial Statement Name window appears.

Click <Next>. Complete steps 6 and 7 on p. 611.
After completing steps 5, 6 and 7 on p. 611, the Headers and Footers window appears.

Complete steps 8 - 13 on p. 612-613.
Read page 613. After completing step 13, the Balance Sheet is shown. (A partial balance sheet follows.)

Financial Statement Wizard (concluded), p. 613
<table>
<thead>
<tr>
<th></th>
<th>Internet Activity, p. 614</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Link to Student Edition.</td>
</tr>
<tr>
<td>3</td>
<td>In the Course-wide Content list, link to Part 4 Internet Activities for Chapters 15-18. Open or Save. Choose Chapter 15 to complete Quizzes, PowerPoints, and Going to the Net exercises.</td>
</tr>
<tr>
<td>4</td>
<td>Complete the ACADEMIC WEBSITES exercise. Read steps 1-6.</td>
</tr>
<tr>
<td>5</td>
<td>Follow the steps shown on the book’s website to complete this Internet activity.</td>
</tr>
<tr>
<td>6</td>
<td>Using a word processing program, write a brief summary of what you find. Include all appropriate website addresses.</td>
</tr>
</tbody>
</table>
Access the Customer Success Stories about the Peachtree Accounting Product Line at

- Select two recent product news articles.
- Write a brief summary (no more than 100 words for each article). Identify the name and date of the articles and the website address in your answer.