

CHAPTER 15 CUSTOMIZING FORMS

The rules are different for printing and designing each type of document. Chapter 15 explains the rules for printing and designing forms. In this book your students have used many different types of forms: invoices, statements, checks, etc. This chapter shows the students how to create their own forms or customize one of the formats that come with PCA. A mouse must be used with the Form Designer.

SOFTWARE OBJECTIVES: In Chapter 15, your students used the software to:



1. Select a form.
2. Select the filter, format, align, and design options.
3. Explore the data, text, command, group, picture, and line objects.
4. Design a Balance Sheet with the Financial Statement Wizard.

WEB OBJECTIVES: In Chapter 15, your students did these Internet activities:

1. Used their Internet browser to go to the book's website.
2. Went to the Internet Activity link on the book's website. Then, selected WEB EXERCISES PART 4. Completed the first web exercise in Part 4—"Academic Website."
3. Used a word processing program to write summaries of the websites that they visited.

PCA TIPS, CHAPTER 15

- Students use the sample company, Bellwether Garden Supply, to complete Chapter 15. They can restore any backup from Chapters 1 - 7.
- If students do not have a backup of Bellwether Garden Supply, they can install starting data for the sample company by following these steps. Or, see Appendix A, Installing Starting Data for the Sample Companies, page 293 – IMK and 294 - IMK for detailed steps. Steps for deleting Peachtree are also shown on the next page.

1. Close Peachtree and all other programs. Place the PCA 2005 CD in the CD drive.
2. At the Welcome to Peachtree Complete Accounting Educational Version screen, select Peachtree Accounting.
3. From the InstallShield Wizard screen, select Add Components – Add additional Peachtree components from the Setup CD. Click .
4. Uncheck the boxes *except* Sample Company Data. Click . Follow the prompts to install the sample company data.
5. Remove the PCA 2005 CD from the CD drive. Start Peachtree and the sample company.

LECTURE OUTLINE FOR CHAPTER 15

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- B. Web Objectives, page 555
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- D. What is a Form?, pages 556-557
- E. Getting Started, page 557
 1. Selecting a Report, pages 558-559
 2. The Filter Options, pages 560-561
 3. The Format Options, pages 561-562
 4. The Align Options, page 563
- F. Designing Forms, pages 564-569
- G. Editing a Form Design, pages 569-571
- H. Financial Statement Wizard, pages 571-575
- I. Internet Activity, page 575
- J. Summary and Review, page 576
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2. Multiple-choice questions, pages 577-579
3. Exercise 15-1, page 579
4. Exercise 15-2, page 579
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ANSWERS TO GOING TO THE NET

1. Go to the Success Stories about the Peachtree Accounting Product Line at http://smallbusiness.bestsoftware.com/press/case_studies_peachtree.cfm
2. Students select an article about a company using Peachtree and identify two or three benefits. Students should include the website address in their answer.

ANSWERS TO MULTIPLE CHOICE QUESTIONS

1. b (A document that you exchange with customers, vendors, or employees.)
2. a (Reports, Financial Statements, Forms)
3. b (Disbursement Checks, 1099 Forms, Purchase Orders, Vendor Mailing Labels)
4. c (Invoices, Statements, Customer Mailing Labels, Quotes, Collection Letters)
5. c (Picture Objects)
6. a (Payroll Checks, 940's and 941's, State Quarterly Tax Forms, Employee Mailing Labels)
7. b (Text Objects)
8. c ((Changes cannot be made to that column entry.)
9. d (All of the above)
10. d (Command Objects)

SOLUTIONS TO EXERCISES 15-1 AND 15-2

Students are instructed to experiment with PCA's Form Designer in Exercises 15-1 and 15-2. Solutions to these exercises will vary.