



Forms Designer

with Screen Designer

For Attaché 7

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Foreword

This *Forms Designer* guide contains detailed instructions on how to use the Forms Designer tool in your Attaché 7 software to design, modify and manage your form layouts.

The guide includes information on creating and modifying forms, adding text and graphics, saving, printing and creating multiple forms. Also included are special instructions for designing forms for sending via email and fax via the Attaché Alex document delivery service.

The publication also includes the *Screen Designer* guide, that contains information to help you design, modify and manage your Attaché 7 transaction-entry screens, including creating user-specific screens.

In addition, the appendix lists the different fields available for placement on your various Attaché 7 forms and screens, with a brief description of each field.

Sample only

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- Attaché consultants
- Getting help, support and resources
- Training
- About your Attaché system
- Conventions used in this guide

Attaché Software products and services

Contacting Attaché Software

If you'd like more information about any Attaché Software products or services, talk to your Attaché consultant or contact Attaché Software. Contact information for Attaché Software can be found on the back cover of this guide or refer to the Attaché websites.

Attaché Software website www.attachesoftware.com

CBP Members website www.attachesoftware.com/cbpmembers

For more information see *CBP Members website*
– *online resources* on page 8

Staying up to date

The easiest way to stay up to date with the latest Attaché news is by subscribing to our email news bulletins. The news bulletins contain information about upgrades and new releases, changes to business and taxation regulations, training, special events and important support issues.

News bulletins are free to all CBP members but in keeping with our anti-spam policy, you must “opt in” to receive them. You can subscribe as many staff as you wish. This way you can be sure that if one staff member is sick or on leave, other staff will still receive any important news. To receive our email bulletins sign up at the CBP Members website or send an email to cbpmembers@attachesoftware.com and type **subscribe** plus your VIP and company name as the subject. (To subscribe additional staff, type their email addresses in the body area.)

Productivity tools

Attaché Software develops and supports a number of tools that you can use with your Attaché system to increase productivity and get more from your Attaché data:

- **Attaché Alex** lets you send documents straight from your Attaché system to any fax or email recipient. Attaché Alex service fees are based on usage and billed monthly. At around the cost of a postage stamp per document, Alex is not only easy to use, it saves you time and eliminates the costs of stationery, postage and handling.

- **Attaché ExpressLink** lets you open, save and send Attaché reports in different formats and different programs. For example, you can choose to open an Attaché 7 report in Word or Excel, email it, or save it in HTML or CSV format.
- **Attaché ODBC** lets you export data, perform queries and generate reports using applications you already know such as Excel and Word.
- **Attaché Contacts** lets you store and report on the details of an unlimited number of contacts for each of your existing customers and suppliers.
- **Attaché Archive** lets you back up your data with a simple one-step process from within your Attaché 7 system.

To find out more about these productivity tools, visit the Attaché Software website, talk to your consultant or contact Attaché Software.

Pre-printed business stationery

Attaché Software can provide customised, pre-printed business forms and cheques, in both A4 and continuous format. These forms ensure consistent quality, improve the presentation of your company and are easy to use.

You can purchase stationery through your Attaché consultant or directly from Attaché Software. Contact us for the latest order form or visit the Attaché Software website for stationery samples and ordering information.

Attaché consultants

When it comes to Attaché products, expert help is always just a phone call away. Attaché consultants offer a broad range of services including:

- installing, setting up and upgrading your Attaché products
- training, advice and trouble-shooting
- help with end-of-year processing and other procedures
- hardware issues, including computer networking

Your Attaché consultant can tailor a support agreement to suit your particular needs. If you don't have an agreement with an Attaché consultant, contact Attaché and we'll put you in touch with a suitable consultant.

Getting help, support and resources

There are various options available if you need help with installing, setting up or using any of your Attaché Software products and services.

Application Help

Attaché Software products include extensive Help within the software, including overviews of tasks and detailed descriptions of fields.

- Task Help — with a task screen open, press **shift+F1** on your keyboard or click **Task Help** on the Help menu to access an overview of the selected item.
- Field Help — with the cursor positioned in a field, press **F1** on your keyboard or click **Help** on the Help menu to access detailed information about the field.

Getting assistance

In association with your Attaché consultant, Attaché Software provides various types of support agreements to licensed users of Attaché products and services. By having a support agreement you can be sure that professional assistance is available if problems arise or you need to carry out new or unfamiliar procedures.

Our ongoing support agreements can include telephone support only, telephone support plus training, or telephone support with both training and on-site assistance. To find out more, contact Attaché Software.

CBP Members website – online resources

The CBP Members website is the main source for Attaché support information and user resources. As well as software upgrades, the website has the latest news, guides and support information. Plus you

can find out about training courses, special offers and new Attaché products and services.

The CBP Members website is accessible to licensed Attaché users only. To enter the site, you need to sign in by typing your VIP number and the business telephone number as registered with us.

CBP Members website www.attachesoftware.com/cbpmembers

Attaché publications

As a CBP member you have free and unlimited access to a library of guides on the CBP Members website. You can easily download and print documents or read them on-screen.

In addition, a number of publications are available for purchase, including special-purpose guides and training materials. You can purchase guides via the CBP Members website or contact Attaché Software and we'll send you the latest guides order form.

Training

Your Attaché consultant can provide training in Attaché products. In addition Attaché Software conducts regular classroom training courses in our Sydney and Auckland training centres and at scheduled times throughout Australia and New Zealand.

Attaché training courses are run by qualified trainers in small groups where you can be certain of personalised attention and the opportunity to ask questions that are pertinent to your particular business operations. All participants receive extensive course notes.

Courses include subjects such as accounts payable and receivable, general ledger, payroll setups and processing and Attaché ODBC.

Course information, timetables and registration are available from the CBP Members website. Self-training resources and tutorials are also available from the CBP Members website.

About your Attaché system

Details of your Attaché system

You can find information about your Attaché system, such as your current version, VIP number, licence details and modules on the **About Attaché 7** screen. This screen also provides links to the Attaché websites.

To access the About Attaché 7 screen, choose **Help | About Attaché 7**.

Software licensing

Your Attaché 7 system is licensed to you by Attaché Software Australia Pty Limited. You are authorised to use Attaché 7 and any licensed Attaché products while you continue to make payments under the Attaché Fast Track Plan. Should you discontinue payment, your licence will be cancelled. If your licence is cancelled (or it expires), you can continue to access your Attaché 7 system to enquire on your data. However, you will be unable to edit or delete your data.

For more information about your licence refer to the Attaché Software website or, in Attaché 7, choose **Help | About Attaché 7**. Alternatively, contact your Attaché consultant or Attaché Software.

Upgrading your software

Attaché Software regularly releases software upgrades which may include changes due to new business regulations as well as new features and enhancements. As a licensed Attaché user, upgrades to all your Attaché products are free of charge.

Upgrades are announced in our email news bulletins (see *Staying up to date* on page 6) and on the CBP Members website. Your consultant will also advise you when upgrades are released.

It's not difficult to upgrade your Attaché system. You can do it yourself by downloading the new version from the CBP Members website, where you'll also find detailed installation instructions. Alternatively, you can upgrade by purchasing the latest Attaché CD-ROM or, if you prefer, you can organise for your Attaché consultant to upgrade your system for you.

Sample companies and forms

Your Attaché system includes a number of sample companies that you can use to practise new procedures and carry out tutorials or other training exercises. They're also a great way to explore new features in the software when you upgrade.

To use a sample company, select it from the list of company names when you sign on to Attaché 7. You can recognise the sample companies by the square brackets around the name, for example [Sample Data].

Conventions used in this guide

Throughout this guide the elements of your Attaché system are represented in the following ways:

Item	Example	Description
Menu	Masterfiles Customers Standard Charges Maintain	From the function menu, choose the module, then the folder, and then the task.
Field name	<i>Customer Code</i>	The label for a field.
Field value	ABEL	Information entered into a field.
Button	Find (F2)	Click the Find button on the screen or press the F2 key on your keyboard.
Key	Page Down	Press the Page Down key on your keyboard.

Table 1 Conventions used in this guide

Notes, cautions and warnings

Notes draw your attention to important or useful information. *Cautions* tell you how to avoid making errors which could cause you to, for example, lose data or create extra work. *Warnings* tell you about the consequences of not following prescribed procedures.

Note

This is a note. It draws your attention to important or useful information which will increase the effectiveness of your software.

Tip

This side box contains tips for using the application effectively.

Text in the side margin highlights helpful information – *tips* that may improve efficiency and increase productivity.

Sample only