



Cheat Sheet - Forms Assistant

Features

- Create professional looking Documents and Statements.
- Quickly and easily without having to open the forms designer.
- Only applicable to plain single sheet style for printing, not pre-printed stationary.
- Forms Assistant uses the forms with .zzz extension in the Custom folder. These specific forms should not be deleted if using Forms Assistant.
- For advanced customisation, open the *.zzz file in forms designer and then rename the file back to its original name in the Forms folder.

Insert an image

If the image size exceeds the picture box size, a message displays indicating the image will be resized. The aspect ratio is locked, ensuring a consistent image quality.

Images are automatically saved in the company folder ensuring a backup is available when upgrading.

The image path

The path of the image is stored on the form and when printing the system looks for the image in the company folder. If the image is not located, the original path the image was inserted from will be used.

If you encounter resize errors, it is possible that the wiaaut.dll file is not present on the server. Click on the link below to learn more about activating the file.

Consult with your system administrator.

[http://computerstepbystep.com/windows_image_acquisition_\(wia\)_service.html](http://computerstepbystep.com/windows_image_acquisition_(wia)_service.html)

Backups

If you have created a new form and would like to restore the previous form, you can click on the Restore button and the old form will be restored. This old form is backed up to the company directory as *formname*.BAK.

Customising your forms with Forms Assistant

Select Document to customise

Emailed or Printed Forms
Select which form types you would like to change the layouts for. This assistant may be run multiple times to change multiple forms.

Documents

☐ Emailed and PDF Documents

☐ Printed and On-screen Documents

Statements

☐ Emailed and PDF Statements

☐ Printed and On-screen Statements



Select colour template

Emailed and PDF Documents
Your current forms display in the Current Form Layout drop down. An enhanced layout can be selected from the New Form Layout drop down. Once applied, forms can be edited using the Forms Designer. Click on the form to preview it. Click Next to continue.

Current Form Layout
CSDOCPDFSP.ENG

New Form Layout
ProgressMagenta

Original Customer/Supplier Document, PDF And Email, Plain Single Sheet



Insert a logo

Insert Picture
If you would like to insert your company logo, click on the browse button to select the image. Click on the form to preview it. Click Next to continue.

Browse

New Form Layout



Preview the changes and click on the Process button to complete the action.

Confirm Operation
You are about to replace your current form layout with the new form layout. Your current customised form will be backed up in the company folder in case you want to restore it later. Click on the forms to preview.

Current Form Layout

New Form Layout

Click Process to finalise the new form, or Cancel to leave this assistant.