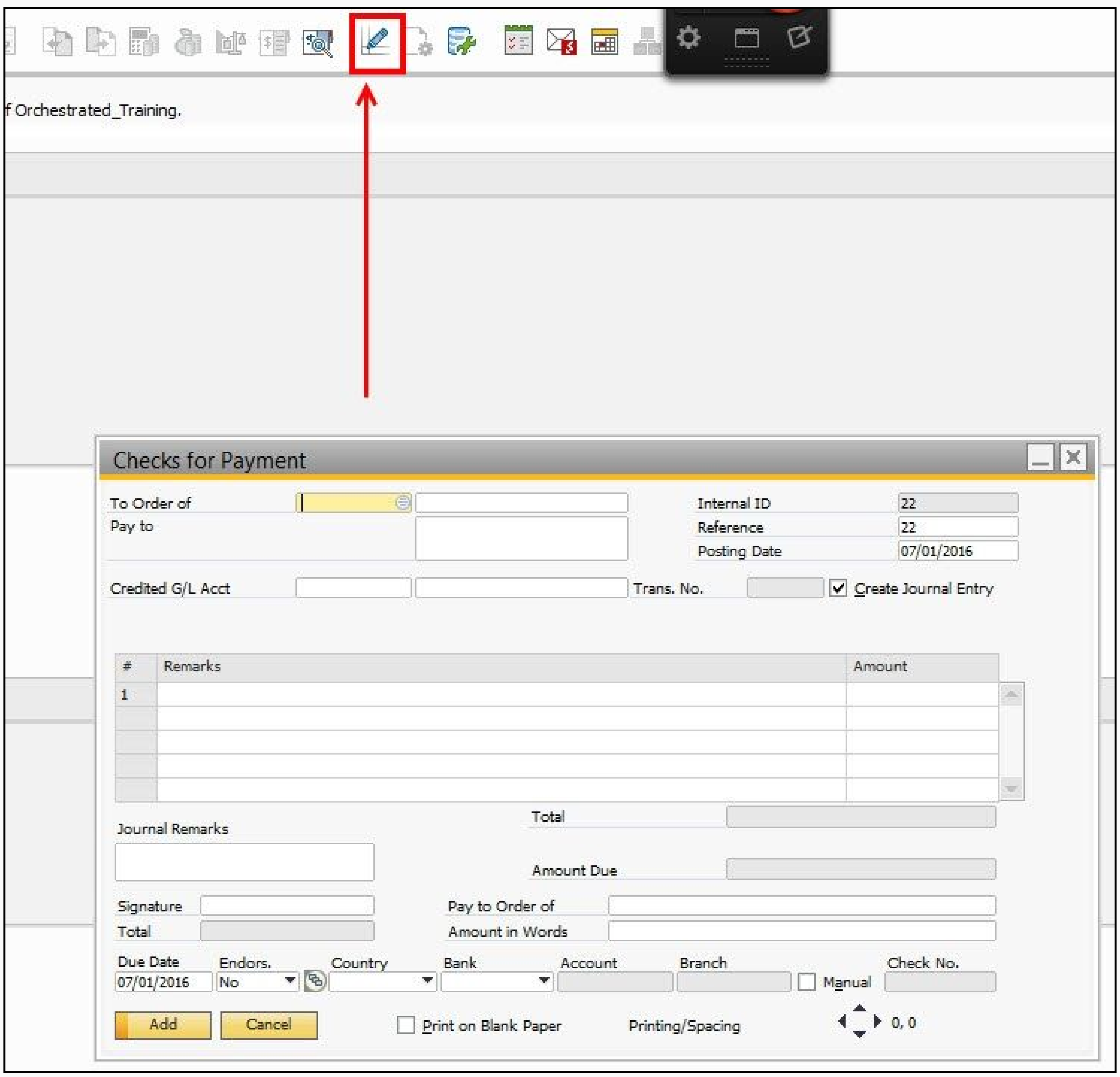
Summary

If you need to add a field, move a field, or delete a field - follow these instructions. These should minor edits to the already existing check layouts within your Orchestrated system.

Step by Step instructions

1) Find the layout that needs editing. To do this, go to *Banking > Outgoing Payments > Checks for Payment*.

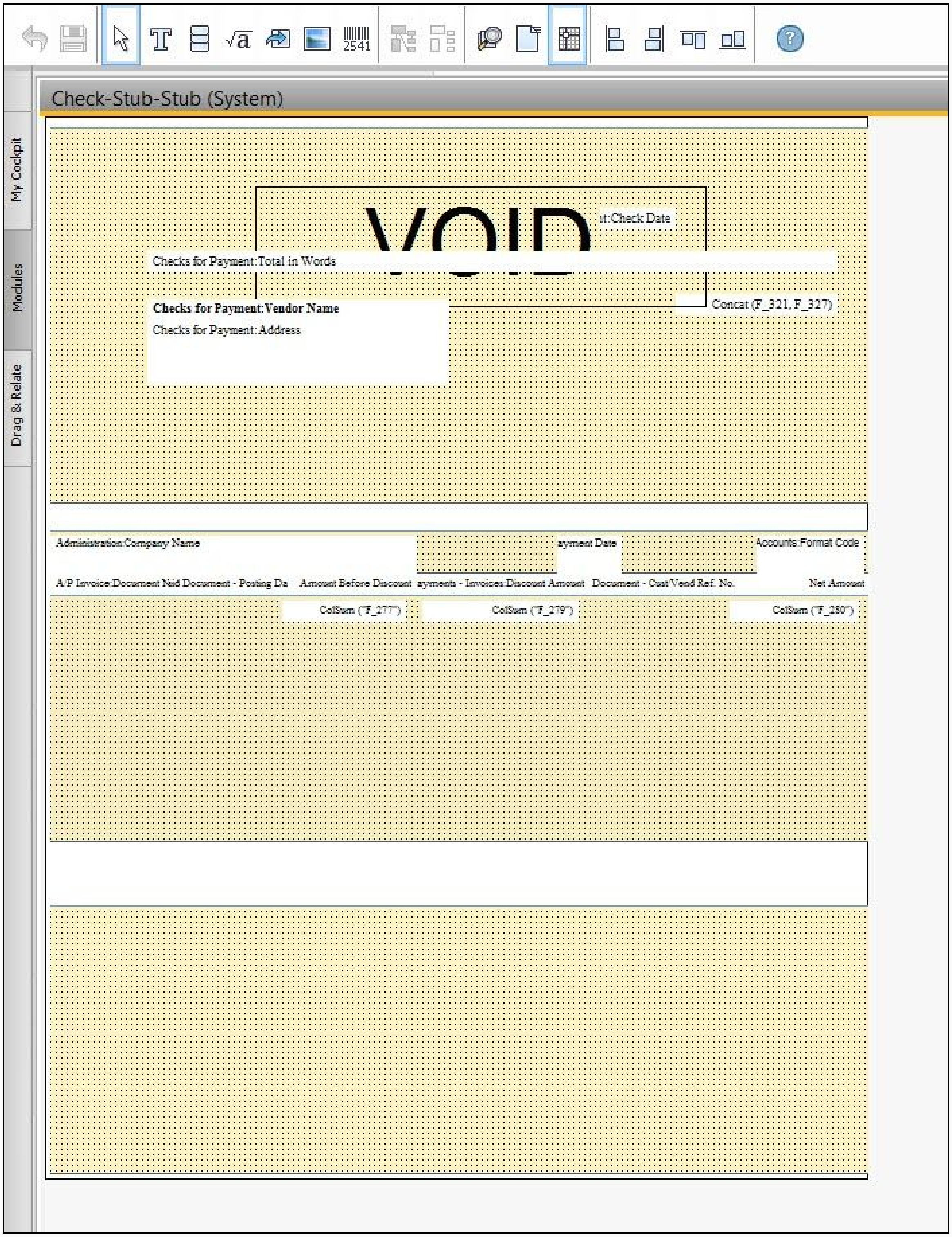
2) Once on the blank *Checks for Payment* screen, click on the *Layout Designer* icon at the top of your screen. See below.



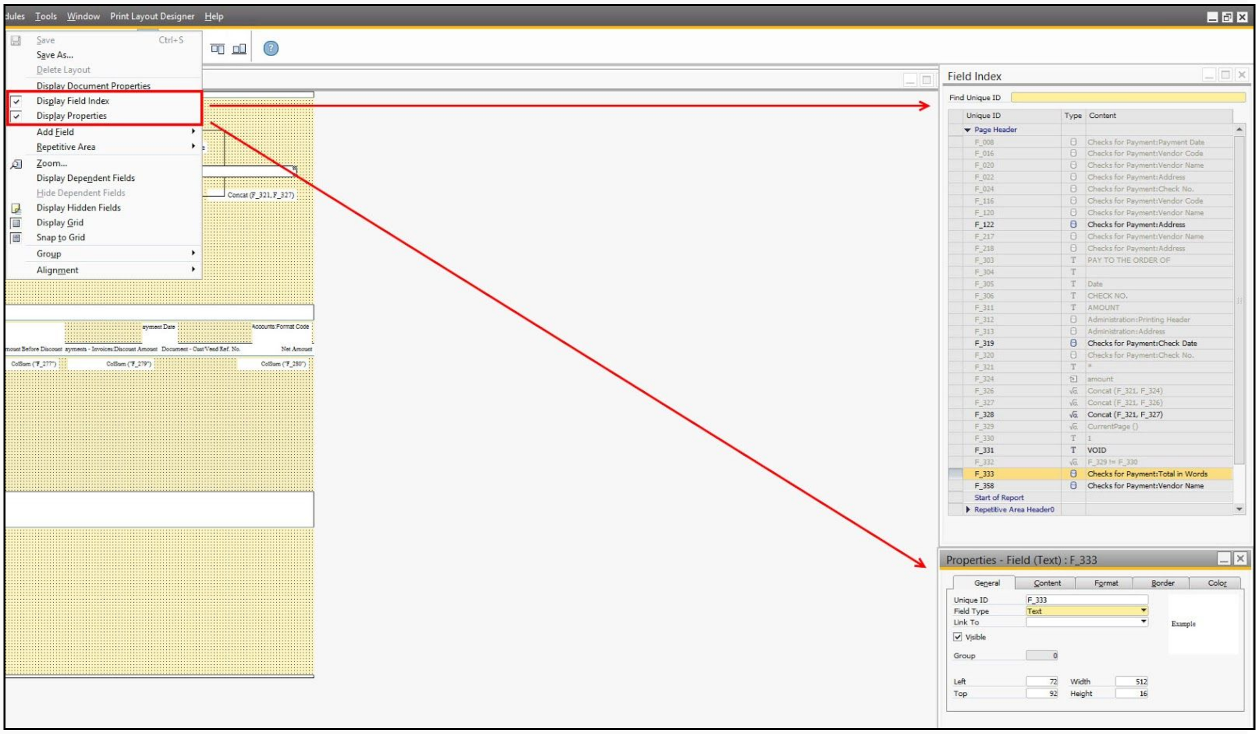
3) You'll see a *Layout and Sequence* window pop up. Your default layout should be in bold. Select it and hit *Manage Layout* in the bottom right corner of the window.

4) *Report and Layout Manager* should have launched on your screen. Select the layout once more and click *Edit* in the bottom right corner.

This should now open up the actual layout. It may take a moment. It will similar to this:



5) The two main window that will use to edit the layout will be the *Field Index* window as well as the *Properties* window. To make these visible on your screen, go up to the *Print Layout Designer* menu and select *Display Field Index/Display Properties.*



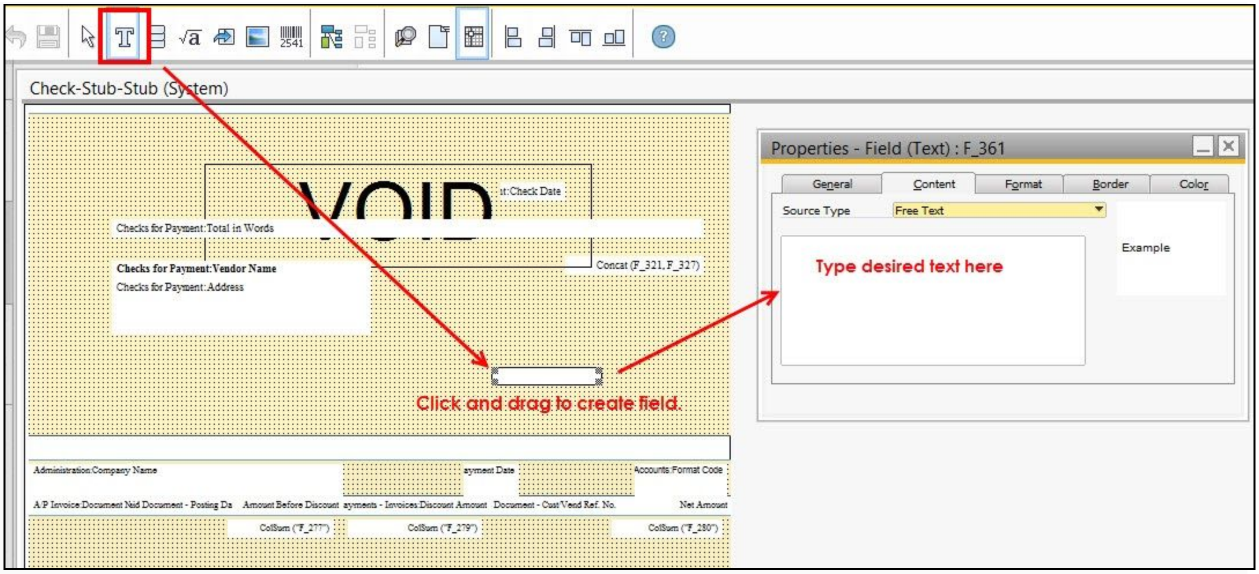
6) Make necessary edits.

***To <u>change</u> the format of a field (font, size, border, etc.) -** you will need to select the field on the check layout and then use the *Properties* window to edit.

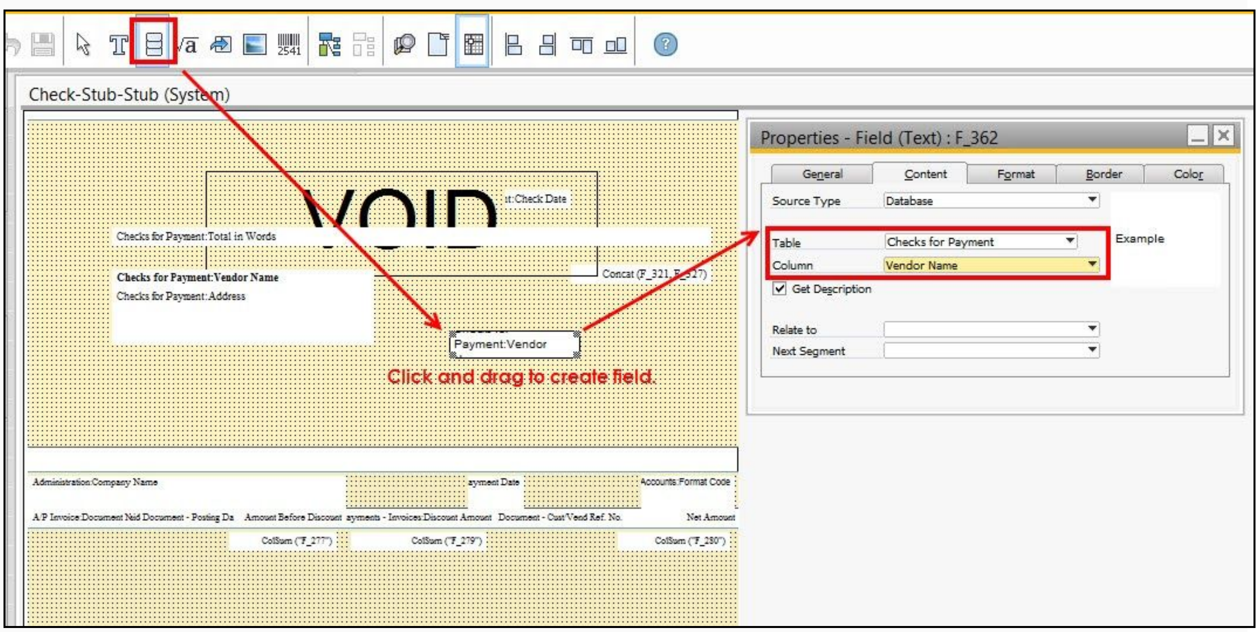
***To <u>delete</u> a field -** just simply select the field on the check layout and press delete on your keyboard. You can also right-click on the field and select *Delete*.

*** To <u>add</u> a field -** you will need to determine what type of field you are trying to add.

If it is free text, you will need to go up to your icon area and select the *Free Text* icon. Once it has been selected, find the area that you'd like to place this field into. Click and drag to fit the size that you'd like it to be. Use the *Properties* window to type the text into. See below.



If it is a database field, you will need to go up to your icon area and select the *Database* icon. Once it has been selected, find the area that you'd like to place this field into. Click and drag to fit the size that you'd like it to be. Use the *Properties* window to choose the database field that you'd like to populate. You'll need to choose the *Table* the field is coming from - most likely *Checks for Payment*.



7) Once you have edited the fields needed - make sure they look correct. This means, resizing the field to fit where its needed - as well as moving the field to make sure it is in the correct area of the layout.

8) Time to save the changes! Once your layout is ready, go up to *Print Layout Designer* and *Save As.*

Make sure that you rename it with a unique name. We usually add a version or the name of the company to the end so you can differentiate between all of the layouts.

9) Now that it is saved, you can close out of the layout.

10) Last step - set the new layout as your default. To do this, you'll need to update it in two places.

- ***Checks for Payment*** - go back to *Checks for Payment* [Banking > Outgoing Payments > Checks for Payment]. Click on the *Layout Designer* icon a the top of your screen (done in Step #2). Select your newly edited layout and click *Set as Default*. Make sure you *Set as Default for All Users*.
- ***House Bank Accounts*** - go to *House Bank Accounts* [Administration > Setup > Banking > House Bank Accounts]. Once the window opens up, scroll to the very far right. Under the *Template Name* column, select your new layout. Additionally, this is where you set your Next Check Number to be printed. Hit *Update* in the bottom left corner.

Your layout has now been defaulted!

If you need to do any further editing to the new layout, you will just follow the steps described above. The only difference will be that you will not need to *Save As,* just *Save* - as well as you won't need to default the layout again.

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