ACS Financial Suite Check Layout Design

Check Layout Design

You can make adjustments to an existing check layout for laser checks using the **Check Layout Design** feature in General Ledger, Accounts Payable, or Payroll. In addition, you can associate a default check template for each bank within your organization. You can use 8.5 x 11 laser and dot matrix checks in General Ledger.

Check Layout Design includes pre-designed templates. You can select an existing template and use it in its original format, or you can modify the template to achieve the desired layout. You can then save the modified template as a new check template. For example, you can select an existing template and modify it so that the employee name and address information display better in the envelope window. Or, you can create a template that displays an image on checks and stubs.

Payroll automatically uses a default check template for each bank in your organization. You can assign new defaults if desired. The system-assigned default layout consists of a check stub, a check, and a duplicate stub. All the fields display, including check numbers.

While this feature offers tremendous flexibility, ACS pre-printed checks also offer superior quality and a professional appearance at a reasonable price.

Adding a Template in Check Layout Design

The Check Design feature enables you to add a new check template based on one of the predesigned default templates or a previously created user template. Once you select an existing template, give it a description (name) and modify it as necessary. Check templates are also shared between data sets.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **General Ledger**, then click **Go** .
3. Click **Check Layout Design**.
4. Select the **Bank** you want to associate with your new layout.
5. Click **Select Template**, then **Add**.
6. Select one of the default templates or a user-defined template, then click **OK**.
7. Enter a template **Description**. A new template is created.
8. To use the new template as the default for the selected bank, click **OK** or click **Cancel** to keep the current default template for this bank.

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Accounts Payable** or **Payroll**, then click **Go** .
3. Click **Check Layout Design**.
4. Under **Check Type**, select **Check** or **Direct Deposit**. When issuing checks and printing ACH /Online Checks, you can use the Direct Deposit template.

5. Select the **Bank** you want to associate with your new layout.
6. Click **Select Template**, then **Add**.
7. Select one of the default templates or a user-defined template, then click **OK**.
8. Enter a template **Description**. A new template is created.
9. To use the new template as the default for the selected bank, click **OK** or click **Cancel** to keep the current default template for this bank.

Editing a Template in Check Layout Design

The Check Design feature lets you edit checks. You can modify the currently selected template by moving, adding, editing, or deleting fields on any part of the check. You can also change field descriptions that show on the check layout.

> **Note**
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> When modifying the check layout, make sure that all of the fields are in your printer's printable region for an 8.5-by-11-inch check.

1. Select the template to edit.
2. In the Check Layout Design window, click **Design Check Layout**.
3. Modify the check layout in the following ways. During editing, click the **Preview** tab as needed to view the check in the format that it will print.
4. When editing is complete, click **Save**, then **Close**.

Adding Fields in Check Layout Design

You can add fields to the check layout using the toolbar buttons in the following table. You can add two types of fields: simple text fields and database fields. When you add a simple text field (such as a Label, Memo or Rich Text field), you must manually enter the text you want to display in the field. When you add a database field, instead of entering text, you associate it with a data field in the module.

When you generate checks, the values for database fields are derived from General Ledger, Accounts Payable, or Payroll data.

For example, you can use the DBText component to print your church's name on direct deposit stubs in Payroll. Select **plgename** as the Data Pipeline Name and **Name** as the Data Field.

Button	Component	Description
	Label	Click to insert simple text labels. The text prints on the report as entered.
	Memo	Click to insert multiple lines of text.
	Rich Text	Click to insert formatted text.
	DBText	Click to insert data from a database field.
	DBMemo	Click to print plain text from a memo field in a database table.
	DBRichText	Click to print formatted text from a memo field in a database table.

1. Click the desired button on the toolbar, then click the position on the check layout where you want to insert the new field.
2. If you insert a Label field, enter the text you want to display in the field in the text area located directly under the toolbar on the left side of the window.
3. If you insert a Memo field, right-click the field and select **Lines**. Then type the text you want to display and click **OK**.
4. If you insert a Rich Text field, right-click the field and select **Edit**. Then type the text you want to display and save the text that you entered.
5. If you insert a DBText, DBMemo, or DBRichText field, associate the new field with a database field by selecting the desired field in the list of available fields. This list is located directly under the toolbar near the center of the window.

Editing and Deleting Fields in Check Layout Design

You can edit fields using the Check Design feature. The circumstances under which you might edit fields are many and varied. You may need to change the wording on a label or "hide" a field (rather than deleting it) so that it does not display on the printed checks. For example, you may want to hide the Social Security Number field from checks. You may also need to resize a field.

Edit fields as needed using any of the following procedures. When moving fields, keep in mind that pasting data in the Check Designer does not work the same way it does in other software applications that you are familiar with. When you cut or copy a field in the Check Designer, you can not specify an area to paste the field. When you paste the field, it displays in an area near the vicinity of the previously cut or copied field.

1. Click the label or text field you want to edit.
2. The current text for the field displays at the top left side of the window directly under the toolbar. Click in this area and enter new text or edit existing text.

1. Click the database field you want to edit.
2. Select a new data field in the list of available fields. This list is located under the toolbar near the center of the window.

1. Right-click on the field and select **Visible**.
2. The Visible option is now deselected and this field no longer displays on checks when they print. Make the field visible again at any time by selecting the visible option. Keep in mind that hiding a field does not make it invisible on the check layout. It only keeps it from printing on checks.

1. Select the field you want to resize.
2. Click any of the four edges on the field (depending on whether or not you want to resize the field horizontally or vertically). While holding the left mouse button, drag the edge of the field to resize it.

> **Other ways to resize fields**
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> You can resize a field by using the Shift + Arrow key method. To do this, select the field you want to resize. Press and hold the SHIFT key on your keyboard; then, depending on the direction you want to resize the field, press the left, right, up, or down arrow key to resize the field by small increments.
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> You can also resize a field by using the Position option. To do this, right-click on the field you want to resize and select Position. Enter the desired field Width and Height.

1. Select the field you want to delete.
2. Press the DELETE key on your keyboard.

Moving Fields in Check Layout Design

Use any of the methods in the following table to move fields on the check template. If you want to move a group of fields at one time, hold your left mouse button down and drag it around the group to select it.

When editing fields, keep in mind that the cut and paste and copy and paste features in the Check Designer do not work in the same way as they do in other software applications that you are familiar with. When you cut or copy a field in the Check Designer, you can not specify an area to paste the field. When you paste the field, it displays in an area near the vicinity of the previously cut or copied field.

Method	Method Description
Drag and Drop	Left-click on a field and drag it to the desired location.
CTRL + Arrow key	Left-click on a field to select it. Press and hold the CTRL key on your keyboard. Depending on the direction you want to move the field, press the left, right, up, or down arrow key to move the field in the desired direction by small increments.
Nudge	Left-click on a field to select it and click the appropriate nudge button on the toolbar to nudge the field right, left, up, or down. If the nudge buttons are not on your toolbar, right click on the toolbar and select **Nudge**.
Change Position Numbers	Right-click on the field. Select **Position**. Enter the desired position numbers in the **Left** and **Top** fields and click **OK**.

Realigning Fields in Check Layout Design

Realigning a field is different from moving a field. You may need to realign a field after you have moved a field or inserted a new field and you want the field to be in alignment (vertically or horizontally) with the surrounding fields. For example, you can right justify the **Social Security Number** field on Payroll checks, then AutoSize it to display only the last four digits on the check stub.

Use the alignment buttons on the Check Layout Design toolbar to realign fields on the check template.

> ⚠ **Note**
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> If you do not have the alignment buttons on your toolbar, right-click on the toolbar and select **Align** or **Space**.

1. Click the field you want to use as a justifier. The justifier is the field that you want the other fields to align with.
2. While holding down the SHIFT key on your keyboard, left-click the fields you want to realign.
3. Click the **Align Left** or **Align Right** button on the toolbar.

1. Select the field you want to use as a justifier.
2. While holding the SHIFT key on your keyboard, left-click the fields you want to realign.
3. Click the **Align Top**  or **Align Bottom**  button on the toolbar.