



Forms Design Forms

Overview

Introduction

In this tutorial, you will learn how to enter forms design forms for various Safeguard forms products.

Some of the fields will be repetitive based on the information required by a form.

Use the following sections to key in specific design forms by product line/type.

In This Section

These topics are covered in this section.

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Continuous Forms	8
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Laser Forms

Overview

Introduction

Laser forms are by far the most popular check style today. Used with a laser printer, the customer can quickly print a check needing only the variable information as we will print the standard information for them.

Reference your price pages for specific customer imprint information guidelines.

Laser Form Design Form

This is an example of the Laser Form design form:

The screenshot shows the CMS 6.5 interface for a Laser Form design. The window title is 'CMS 6.5' and the menu bar includes 'Add Design', 'Cont: JARET VON ERICH', and 'Phone: (214)800-1345'. The main form area contains the following data:

() Rush Service (N) Proof <C>olor <F>ax <P>aper <A>etate	Order #08RM0000 Date 02/25/07 Line 1 TELE	Qty 250 Start H	COLORS: Ink: Stock:
Cust # ZZ000800 BOWLING FO Dist # 08M-00	Product SF11F1 LASER FORM 8.5X11		
BASE NEG: [REDACTED]			
LOGO FROM SC CUT BOOK: LOGO: PREVIOUS PLATE # ORDER TYPE:		COLLATION : ARABIC PREFIX: ARABIC SUFFIX:	

Below the form, there are function key instructions: F3=Window Area, F4=Stub Area, F8=Special Instructions, F10=Save, ESC=Exit. A note says 'Press ALT and release it then Press K to see KEYS menu'.

A 'MAILBOX' window is open in the bottom right, showing a list of system events:

MAILBOX	TRN02
CMS VERSION 6.5	02/01/07
LAST REINDER	02/20/07
LAST UPDATE SALES	02/20/07
LAST OVERNIGHT MAINT.	02/20/07
LAST PROD. FILE UPDT	02/20/07
LAST CUST/ORDER RECEIVE:	01/31/07 16:55:07
LAST RECEIVE PROCESSED:	01/31/07 16:55:07
LAST CUST/ORDER SEND:	02/20/07 07:27:29

The bottom status bar shows 'Tdesign', 'Record: 1/1', and 'Exclusive'.



Laser Form, cont.

Laser Form cont.

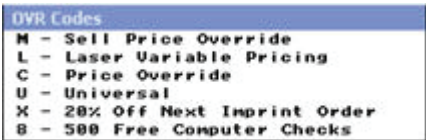
To enter a new Laser Form design form, follow the steps below.

Step	Action
1	Navigate to Contacts from the File menu in CMS by clicking on the Sub-menu title Contacts .
2	Using the mouse, Click on the method by which you will be searching for a contact to place an order. NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <u>Long Name</u> , or <u>Customer Number</u> .
3	Type the information you're looking for [Example: Phone number –area code not required]. Press Enter
4	Once the customer is highlighted in the customer list, press Enter .
5	Enter the product number in the first field of the first line. <i>Note:</i> If you do not know the product number, enter the first few letters of the product code and press Enter to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press Enter . NOTE: If this is a repeat order, press F3 to select from the Detailed Order History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press Enter .
6	In the next field enter an N for new [only available on the customer's first order], R for repeat, or an A for an add-on sale.
7	In the Quantity field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

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Laser Form, cont.

Step	Action
8	<p>Enter the STK/Start #</p> <ul style="list-style-type: none"> ➤ STK – the color of the paper stock. Use the pop-up menu to select from the available options [this field is required on 1-part forms, even if the stock is white]. ➤ Start# - if the order requires numbering, this field is used to indicate the starting number [this field is required on check orders].
9	<p>OVR, use this field to over ride the set price or to use special or value pricing.</p> <div style="text-align: center;">  </div> <p>Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting a value price option, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]</p>
10	<p>The % <Percentage> field is used to give an additional discount for the item.</p> <p>NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.</p>
11	<p>The Price field will fill automatically (unless M is in the OVR field in that case the price must be manually entered).</p>
12	<p>Add a recall date, REP code, and any comments in the last three fields.</p> <p>NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.</p>
13	<p>For orders that require a design form the D at the end of the product line field will change to a T when the design form is created.</p>
14	<p>Press F9 to access the Design Form screens.</p>
15	<p>Select New in the Order Type field.</p>
16	<p>In the Product Type field, using the mouse, Click to select Form. Once your product type is highlighted click the Select button.</p>

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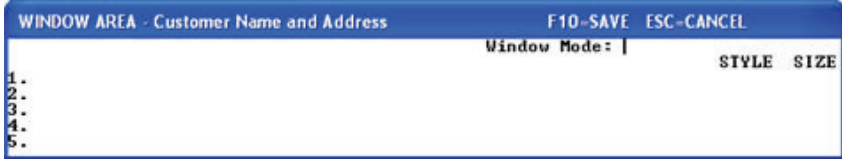
Laser Form, cont.

Step	Action
17	<p>Use the Tab key to navigate through the fields within the design form and Enter the data required for that particular product type.</p> <p>NOTE: Check the bottom of the design form screen for additional screen prompts or buttons that need to be completed.</p> <p>Example of additional screen prompts:</p>  <pre>F3=Window Area F4=Stub Area F8=Special Instructions F10=Save ESC=Exit Press ALT and release it then Press K to see KEYS menu</pre>
18	<p><u>Main Screen:</u> Enter the information required in the fields below:</p> <ul style="list-style-type: none">➤ Rush – use the spacebar to place a ✓ in this field if the design form is for a rush order.➤ Proof – enter the letter corresponding to the type of proof requested. [e.g. “F” = Fax proof]. <p>NOTE: If the order requires an electronic proof, select fax and add a note in special instructions to let the plant know you require an electronic not fax proof. Use the corresponding SFPROOFE code on the order screen.</p> <ul style="list-style-type: none">➤ Ink – enter the corresponding 3-digit color code [BLK = black] in this field. <p>NOTE: If this is a two-color job, enter one color here and key a note in special instructions for the additional color.</p> <ul style="list-style-type: none">➤ Base Neg – enter the appropriate base neg #➤ Logo from SG Cutbook – place the corresponding logo number here➤ Logo: Previous Plate # - enter the plate # for a previous job you are referencing for logo information

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Laser Forms, cont.

Step	Action
18, cont	<p><u>Main screen, cont:</u></p> <ul style="list-style-type: none"> ➤ Order Type – use the spacebar to scroll through the options <ul style="list-style-type: none"> ○ Laser – the reference order type for the logo was a laser check ○ One-Write - the reference order type for the logo was a One-Write check ○ Form - the reference order type for the logo was a form ➤ Collation – use the spacebar to scroll through the options <ul style="list-style-type: none"> ○ Standard – start # on top, checks face up ○ N-NONSTD – start # on bottom, checks face up ○ T-NONSTD– start # on top, checks face down ➤ Arabic Prefix – used to add a prefix to the Arabic # ➤ Arabic Suffix - - used to add a suffix to the Arabic #
19	<p><u>Window Area screen:</u> This is an example of the Window Area Laser form screen:</p>  <p>Press F3 to access the Window Area and enter the appropriate information in the fields below:</p> <ul style="list-style-type: none"> ➤ Window Mode – use the spacebar to scroll through the options. This field indicates justification of the information in the window area. L= Left, R= Right, and C = Center ➤ Lines 1 – 5 - Fill in the appropriate imprint information on each line. ➤ Style – press the <?> key then <Enter> to access a pop-up containing a list of options if the default is not the required font ➤ Size – Enter the size if the default is not the required size

Continued on next page



Laser Forms, cont.

Step	Action
20	Press F10 to save the Window Area.
21	<p><u>Stub Area screen:</u> This is an example of the Stub Area Laser form screen:</p>  <p>➤ 1, 2, and 3 – enter the information the customer needs imprinted in the stub area. Up to 3 lines of text available.</p>
22	Press F10 to save the Stub Area.
23	<p><u>Special Instructions screen:</u> This is an example of the Special Instructions Laser form screen:</p>  <p>Use this screen to enter any additional information the composition department might need to complete your Laser Form design.</p>
24	Press F10 to save the Special Instructions Area.
25	Press F10 to save the design form.
26	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
27	Press F10 to save the order.



Continuous Forms

Overview

Introduction

Continuous forms are offered to customers who use Dot Matrix – Pin feed printers.

Reference your price pages for specific customer imprint information guidelines.

Continuous Form Design Form

This is an example of the Continuous Form design form:

02/25/07 KEYS Safeguard Customer Management System F1=?

Add Design Cont: JOE JONES/OWNER Phone: (123)456-7890 10:46:47 PM

*** Continuous - FORM - NEW ***

() Rush Service (N) Proof <C>olor <F>ax <P>aper <A>etate	Order H0RM0000x Date 02/25/07 Line 1 TELE	Qty 500 Start # 11	COLORS: Ink: Stock: WHT
Cust # ZZ000Y00 ABC Dist # 0RM-00	Product SGCC128F1 CUSTOM 12X8.5 FORM	REFERENCE PLATE #:	

ENVELOPE REQUIRED:
SOFTWARE NAME AND VERSION: SOFTWARE ALTERED? N
LOGO FROM SG CUT BOOK:
LOGO: PREVIOUS PLATE #
ORDER TYPE:

F3=Window Area F4=Secondary Area F5=Optional Imprint
F8=Special Instructions F10=Save ESC=Exit
Press ALT and release it then Press K to see KEYS menu

MAILBOX	TRN02
CMS VERSION 6.5	02/01/07
LAST REINDER	02/28/07
LAST UPDATE SALES	02/28/07
LAST OVERNIGHT MAINT.	02/28/07
LAST PROD. FILE UPDT.	02/28/07
LAST CUST/ORDER RECEIVE:	01/31/07 16:55:07
LAST RECEIVE PROCESSED:	01/31/07 16:55:07
LAST CUST/ORDER SEND:	02/28/07 07:27:29

Tdesign Record: 1/1 Exclusive



Continuous Form, cont.

Continuous Form cont.


To enter a new Continuous Form design form, follow the steps below.

Step	Action
1	Navigate to Contacts from the File menu in CMS by clicking on the Sub-menu title Contacts .
2	Using the mouse, Click on the method by which you will be searching for a contact to place an order. NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <u>Long Name</u> , or <u>Customer Number</u> .
3	Type the information you're looking for [Example: Phone number –area code not required]. Press Enter
4	Once the customer is highlighted in the customer list, press Enter .
5	Enter the product number in the first field of the first line. <i>Note:</i> If you do not know the product number, enter the first few letters of the product code and press Enter to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press Enter . NOTE: If this is a repeat order, press F3 to select from the Detailed Order History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press Enter .
6	In the next field enter an N for new [only available on the customer's first order], R for repeat, or an A for an add-on sale.
7	In the Quantity field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

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Continuous Form, cont.

Step	Action
8	Enter the STK/Start # [these fields are required on check orders]. <ul style="list-style-type: none">➤ STK – the color of the paper stock. Use the pop-up menu to select from the available options.➤ Start# - if the order requires numbering, this field is used to indicate the starting number.
9	OVR , use this field to over ride the set price or to use special or value pricing.  <p>Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting Value Pricing, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]</p>
10	The % <Percentage> field is used to give an additional discount for the item. NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.
11	The Price field will fill automatically (unless M is in the OVR field in that case the price must be manually entered).
12	Add a recall date, REP code, and any comments in the last three fields. NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.
13	For orders that require a design form the D at the end of the product line field will change to a T when the design form is created.
14	Press F9 to access the Design Form screens.
15	Select New in the Order Type field.
16	In the Product Type field, using the mouse, Click to select Form . Once your product type is highlighted click the Select button.

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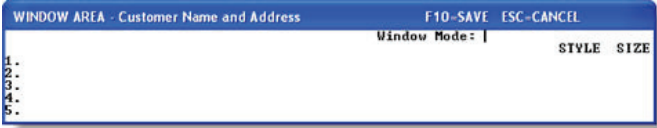
Continuous Form, cont.

Step	Action
17	<p>Use the Tab key to navigate through the fields within the design form and Enter the data required for that particular product type.</p> <p>NOTE: Check the bottom of the design form screen for additional screen prompts or buttons that need to be completed.</p> <p>Example of additional screen prompts:</p> <div style="border: 1px solid black; padding: 5px; text-align: center; margin: 10px auto; width: fit-content;"> <p>F3=Window Area F4=Secondary Area F5=Optional Imprint F8=Special Instructions F10=Save ESC=Exit Press ALT and release it then Press K to see KEYS menu</p> </div>
18	<p><u>Main Screen:</u> Enter the information required in the fields below:</p> <ul style="list-style-type: none"> ➤ Rush – use the spacebar to place a ✓ in this field if the design form is for a rush order. ➤ Proof – enter the letter corresponding to the type of proof requested. [e.g. “F” = Fax proof] <p>NOTE: If the order requires an electronic proof, select fax and add a note in special instructions to let the plant know you require an electronic not fax proof. Use the corresponding CPROOFE code on the order screen.</p> <ul style="list-style-type: none"> ➤ Ink – enter the corresponding 3-digit color code [BLK = black] in this field. <p>NOTE: If this is a two-color job, enter one color here and key a note in special instructions for the additional color.</p> <ul style="list-style-type: none"> ➤ Reference Plate #– this field is not currently active for new orders. ➤ Envelope Required – enter the envelope product code that corresponds with the check bas neg#. ➤ Software Name and Version– enter the Base Negative for the form. ➤ Software Altered – Default is <N> for No, if they have altered it, enter <Y> for Yes. <p>NOTE: Hardcopy X Pattern MUST be submitted if software has been altered in order to process this order. A Design Form with Altered Software <Y> WILL NOT transmit through Telecomm. Send hard copy.</p>

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Continuous Form, cont.

Step	Action
18, cont	<p><u>Main screen, cont:</u></p> <ul style="list-style-type: none"> ➤ Logo from SG Cutbook – place the corresponding logo number here. ➤ Logo: Previous Plate # - enter the plate # for a previous job you are referencing for logo information ➤ Order Type – use the spacebar to scroll through the options <ul style="list-style-type: none"> ○ Laser– the reference order type for the logo was a laser check ○ One-Write - the reference order type for the logo was a One-Write check ○ Form - the reference order type for the logo was a form
19	<p><u>Window Area screen:</u> This is an example of the Window Area Continuous form screen:</p>  <p>Press F3 to access the Window Area and enter the appropriate information in the fields below:</p> <ul style="list-style-type: none"> ➤ Window Mode – use the spacebar to scroll through the options. This field indicates justification of the information in the window area. L= Left, R= Right, and C = Center ➤ Lines 1 – 5 - Fill in the appropriate imprint information on each line. ➤ Style – press the <?> key then <Enter> to access a pop-up containing a list of options if the default is not the required font ➤ Size – Enter the size if the default is not the required size
20	Press F10 to save the Window Area.

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Continuous Form, cont.

Step	Action
21	<p><u>Secondary Area screen:</u> This is an example of the Secondary Area Continuous form screen:</p>  <p>➤ 1, 2, 3 and 4 – enter the information the customer needs imprinted in the stub area. Up to 4 lines of text available.</p>
22	Press F10 to save the Secondary Area.
23	<p><u>Optional Imprint Area screen:</u> This is an example of the Optional Imprint Information Continuous form screen:</p>  <p>➤ 1, 2, 3 and 4 – enter the information the customer needs imprinted in the stub area. Up to 4 lines of text available.</p>
24	<p><u>Special Instructions screen:</u> This is an example of the Special Instructions Continuous form screen:</p>  <p>Use this screen to enter any additional information the composition department might need to complete your Continuous Form design.</p>
25	Press F10 to save the Special Instructions Area.
26	Press F10 to save the design form.

Continued on next page



Continuous Form, cont.

Step	Action
27	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
28	Press F10 to save the order.



One-Write Forms

Overview

Introduction

One-Write forms are a manual systems used for various purposes; i.e. gift certificates, visitor passes, etc. Each system will use variation of these four main components.

- Board
- Journal
- Register
- Form

When ordering these items, they can be ordered individual or as kits. Kits are only available on new orders for One-Writes.

Reference your price pages for specific customer imprint information guidelines.

One-Write Gift Certificate Design Form

This is an example of the One-Write Gift Certificate design form:

02/25/07 KEYS Safeguard Customer Management System F1=?

Add Design Cont: JOE JONES/OWNER Phone: (123)456-7890 11:18:15 pm

*** SafeTrack - FORM - NEW ***Will NOT be Transmitted!

() Rush Service (N) Proof <C>olor <F>ax <P>aper <A>etate	Order #0RMxxxxx Date 02/25/07 Line 1 TELE	Qty 625 Start # 120	COLORS: Ink: Stock: BRG
Cust # ZZ000Y00 ABC	Product AUP3 AUP3 VISITOR PASS		

ELECTRO TYPE: BODY TYPE: REM. BOX TYPE: <TYPE DEL TO DELETE>

LOGO FROM SG CUT BOOK:
LOGO: PREVIOUS PLATE #
ORDER TYPE:

F3=Window Area F4=Secondary Area F5=Optional Imprint
F8=Special Instructions F10=Save ESC=Exit
Press ALT and release it then Press K to see KEYS menu

MAILBOX	TRN02
CMS VERSION 6.5	02/01/07
LAST REINDER	02/20/07
LAST UPDATE SALES	02/20/07
LAST OVERNIGHT MAINT.	02/20/07
LAST PROD. FILE UPDT	02/20/07
LAST CUST/ORDER RECEIVE:	01/31/07 16:55:07
LAST RECEIVE PROCESSED:	01/31/07 16:55:07
LAST CUST/ORDER SEND:	02/20/07 02:27:29

Tdesign Record: 1/1 Exclusive



One-Write Gift Certificate, cont.


One-Write Gift Certificate cont. To enter a new One-Write Gift Certificate design form, follow the steps below.

Step	Action
1	Navigate to Contacts from the File menu in CMS by clicking on the Sub-menu title Contacts .
2	Using the mouse, Click on the method by which you will be searching for a contact to place an order. NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <u>Long Name</u> , or <u>Customer Number</u> .
3	Type the information you're looking for [Example: Phone number –area code not required]. Press Enter
4	Once the customer is highlighted in the customer list, press Enter .
5	Enter the product number in the first field of the first line. <i>Note:</i> If you do not know the product number, enter the first few letters of the product code and press Enter to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press Enter . NOTE: If this is a repeat order, press F3 to select from the Detailed Order History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press Enter .
6	In the next field enter an N for new [only available on the customer's first order], R for repeat, or an A for an add-on sale.
7	In the Quantity field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

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One-Write Gift Certificate, cont.

Step	Action
8	Enter the STK/Start # [these fields are required on check orders]. <ul style="list-style-type: none">➤ STK – the color of the paper stock. Use the pop-up menu to select from the available options.➤ Start# - if the order requires numbering, this field is used to indicate the starting number.
9	OVR , use this field to over ride the set price or to use special or value pricing.  <p>Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting Value Pricing, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]</p>
10	The % <Percentage> field is used to give an additional discount for the item. NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.
11	The Price field will fill automatically (unless M is in the OVR field in that case the price must be manually entered).
12	Add a recall date, REP code, and any comments in the last three fields. NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.
13	For orders that require a design form the D at the end of the product line field will change to a T when the design form is created.
14	Press F9 to access the Design Form screens.
15	Select New in the Order Type field.
16	In the Product Type field, using the mouse, Click to select Form . Once your product type is highlighted click the Select button.

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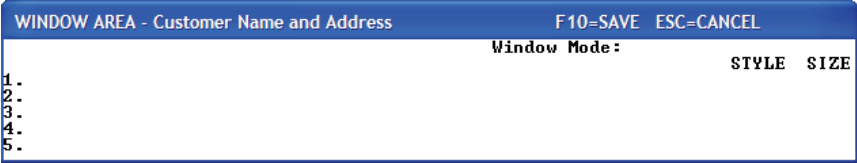

One-Write Gift Certificate, cont.

Step	Action
17	<p>Use the Tab key to navigate through the fields within the design form and Enter the data required for that particular product type.</p> <p>NOTE: Check the bottom of the design form screen for additional screen prompts or buttons that need to be completed.</p> <p>Example of additional screen prompts:</p> <div style="border: 1px solid black; padding: 5px; text-align: center; margin: 10px auto; width: fit-content;"> <p>F3=Window Area F4=Secondary Area F5=Optional Imprint F8=Special Instructions F10=Save ESC=Exit Press ALT and release it then Press K to see KEYS menu</p> </div>
18	<p><u>Main Screen:</u> Enter the information required in the fields below:</p> <ul style="list-style-type: none"> ➤ Rush – use the spacebar to place a ✓ in this field if the design form is for a rush order. ➤ Proof – enter the letter corresponding to the type of proof requested. [e.g. “F” = Fax proof] <p>NOTE: If the order requires an electronic proof, select fax and add a note in special instructions to let the plant know you require an electronic not fax proof. Use the corresponding OWPROOFE code on the order screen.</p> <ul style="list-style-type: none"> ➤ Ink – enter the corresponding 3-digit color code [BLK = black] in this field. <p>NOTE: If this is a two-color job, enter one color here and key a note in special instructions for the additional color.</p> <ul style="list-style-type: none"> ➤ Electro Type – enter the appropriate electro #, located in the Electro book. ➤ Body Type – enter the corresponding code for a top-write check, located in the Electro book. ➤ Rem. Box Type – enter the remittance box code located in the Electro book if the customer wants a different box than what comes with the specified electro. ➤ Logo from SG Cutbook – place the corresponding logo number here.

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One-Write Gift Certificate, cont.

Step	Action
19	<p><u>Window Area screen:</u> This is an example of the Window Area One-Write form screen:</p>  <ul style="list-style-type: none"> ➤ Mode – justification for the window area <ul style="list-style-type: none"> ○ Artwork only – just a logo [may include the address as part of the logo ○ Left – all of the address will line up to the left ○ Right – all of the address will line up to the right ○ Center – all of the address will be centered ➤ 1, 2, 3, 4 and 5 – enter the information the customer needs imprinted in the window area. Up to 4 lines of text available.
20	<p><u>Secondary Area screen:</u> This is an example of the Secondary Area One-Write form screen:</p>  <ul style="list-style-type: none"> ➤ 1, 2, 3 and 4 – enter the information the customer needs imprinted in the stub area. Up to 4 lines of text available.
21	Press F10 to save the Secondary Area.

Continued on next page



One-Write Gift Certificate, cont.

Step	Action
22	<p><u>Optional Imprint Area screen:</u> This is an example of the Stub Area One-Write form screen:</p>  <p>➤ 1, 2, 3 and 4 – enter the information the customer needs imprinted in the stub area. Up to 4 lines of text available.</p>
23	<p><u>Special Instructions screen:</u> This is an example of the Special Instructions One-Write form screen:</p>  <p>Use this screen to enter any additional information the composition department might need to complete your One-Write Form design.</p>
24	Press F10 to save the Special Instructions Area.
25	Press F10 to save the design form.
26	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
27	Press F10 to save the order.