Chapter 15

# Enhancing Invoice Systems

Over the past three chapters you have developed quite an extensive database. Switchboard forms, macros and buttons can be added to the invoice system to allow it be fully usable by people with limited knowledge of Microsoft Access.

## Loading the Sample File

You will be using the invoice system from the previous chapter.

1 If your invoice system from the previous chapter worked well, load Microsoft Access and open the file from your STORAGE folder.

2 If you would prefer to use a fresh fully operational file:

(A) Load Microsoft Access or close the current file and click on the FILE tab. Select OPEN OTHER FILES in the START window or OPEN in the BACKSTAGE VIEW.

(B) Access the CHAPTER 15 folder of the ACCESS 2016 SUPPORT FILES and open the CHAPTER 15 file as an OPEN READ-ONLY file.

(C) Click on the SAVE AS icon in the WARNING BAR under the RIBBON.

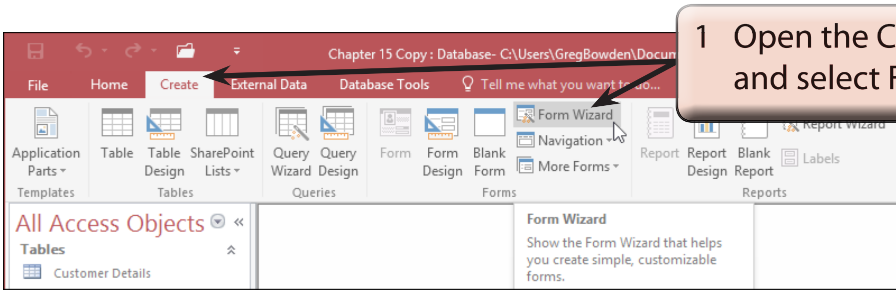
(D) Access your STORAGE folder and save the file as CHAPTER 15 COPY.

(E) Click on the ENABLE CONTENT button so that the data can be viewed.

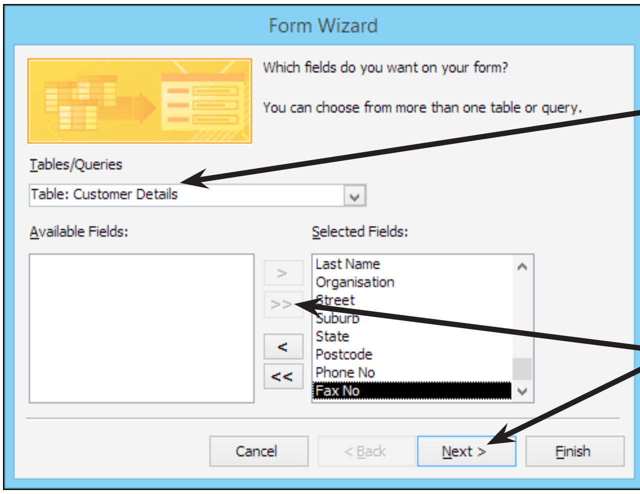
## Creating a Customers Data Entry Form

At the moment there is only a table where new customers can be entered or existing customers modified. It would be far more effective to have a DATA ENTRY form to carry out this process. We will use the FORM WIZARD to create a very quick form.

### A Creating the Form

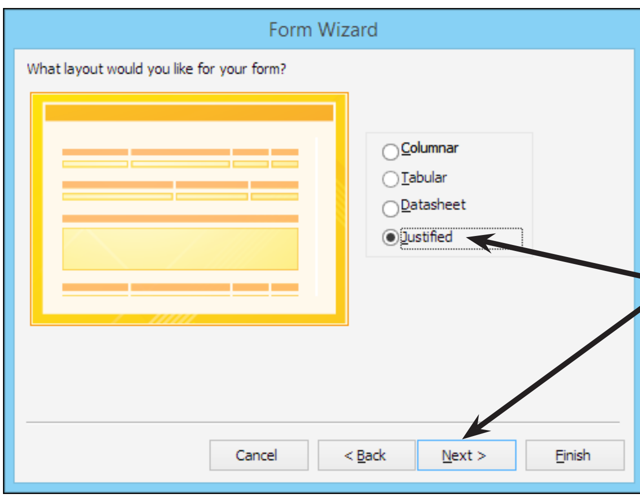



1 Open the CREATE tab of the RIBBON, and select FORM WIZARD icon.

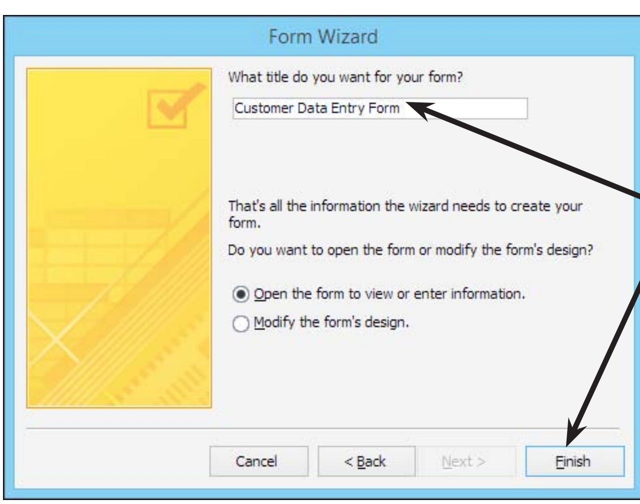



2 In the FORM WIZARD dialogue box set the CHOOSE TABLE OR QUERY box to the CUSTOMER DETAILS table.

3 Move all the fields into the SELECTED FIELDS frame and click on NEXT.



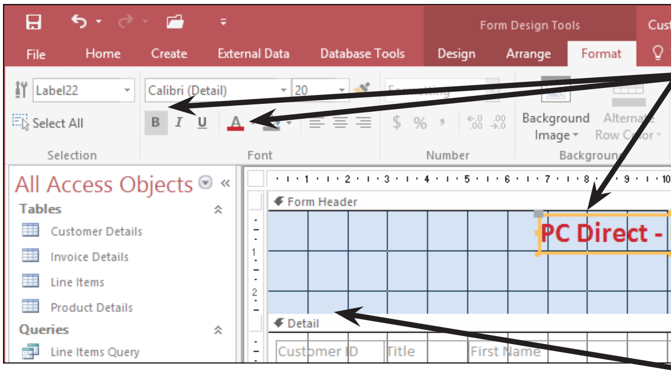

4 Select the JUSTIFIED layout and click on NEXT.




5 Name the form:

Customer Data Entry Form

and click on the FINISH button to create the form.

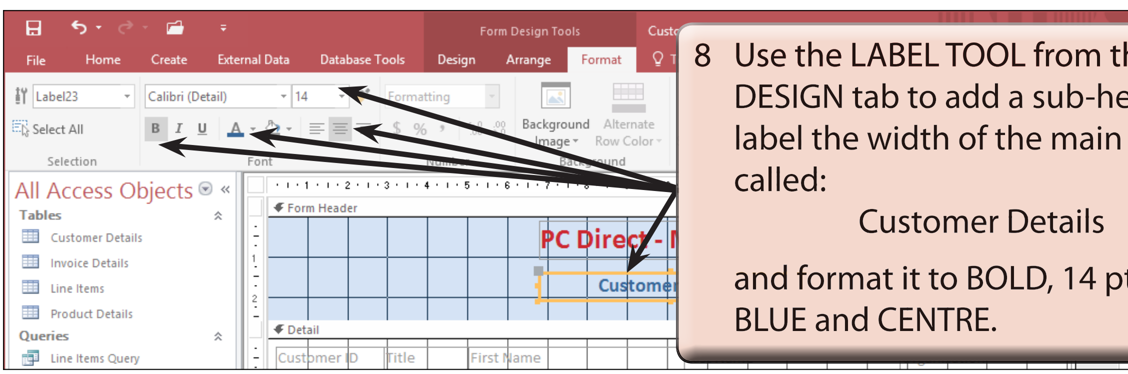



6 Set the view to DESIGN VIEW, adjust the heading to:

PC Direct - Mail Order

press <enter>, format it to BOLD, DARK RED, double click on a handle to enclose to text and centre it over the fields.

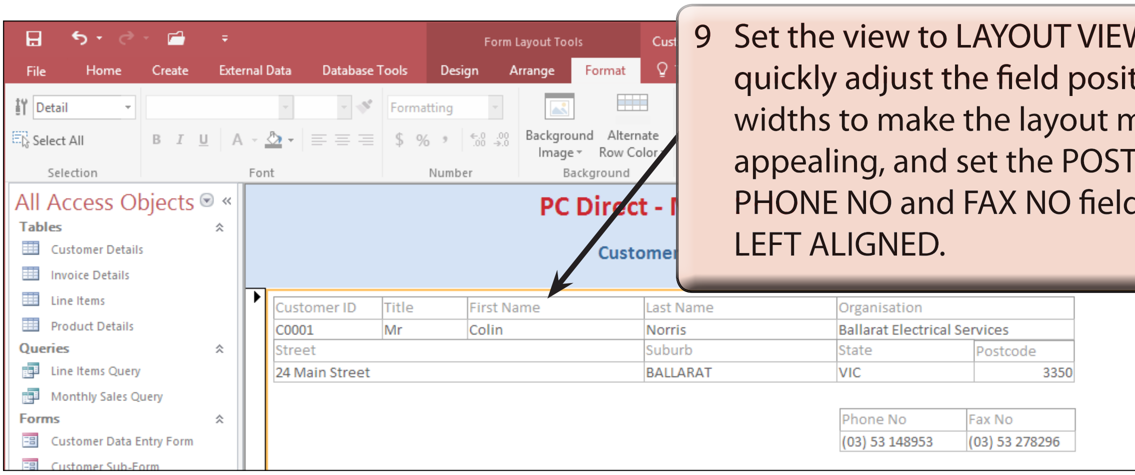
7 Increase the height of the FORM HEADER section to 2.5 cm by dragging the DETAIL border down.




8 Use the LABEL TOOL from the DESIGN tab to add a sub-heading label the width of the main heading called:

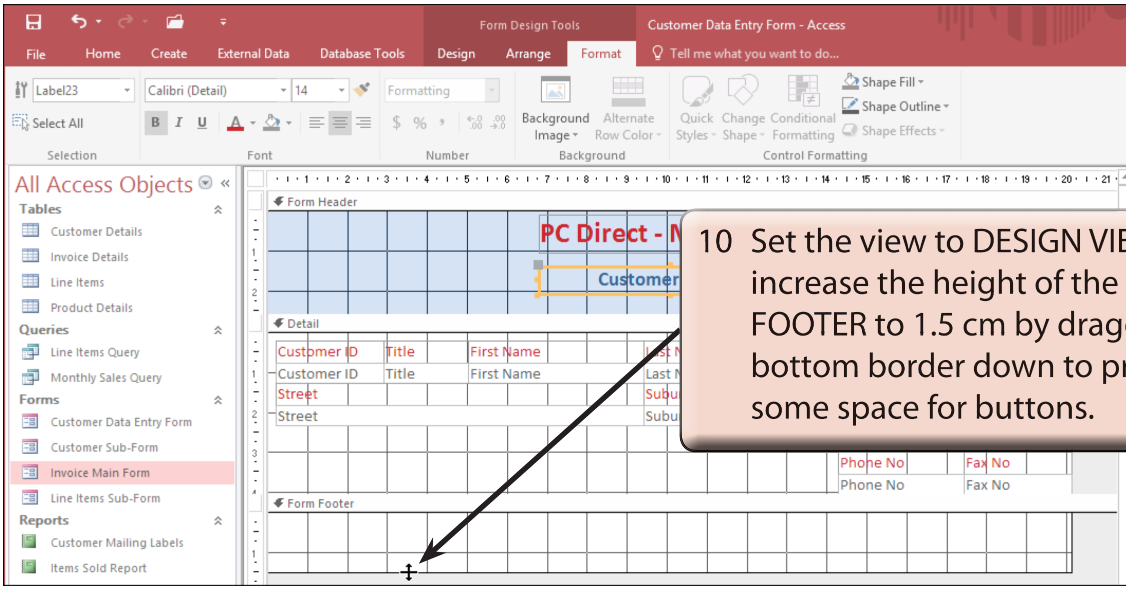
Customer Details

and format it to BOLD, 14 pt, DARK BLUE and CENTRE.




9 Set the view to LAYOUT VIEW and quickly adjust the field position and widths to make the layout more appealing, and set the POSTCODE, PHONE NO and FAX NO fields to be LEFT ALIGNED.

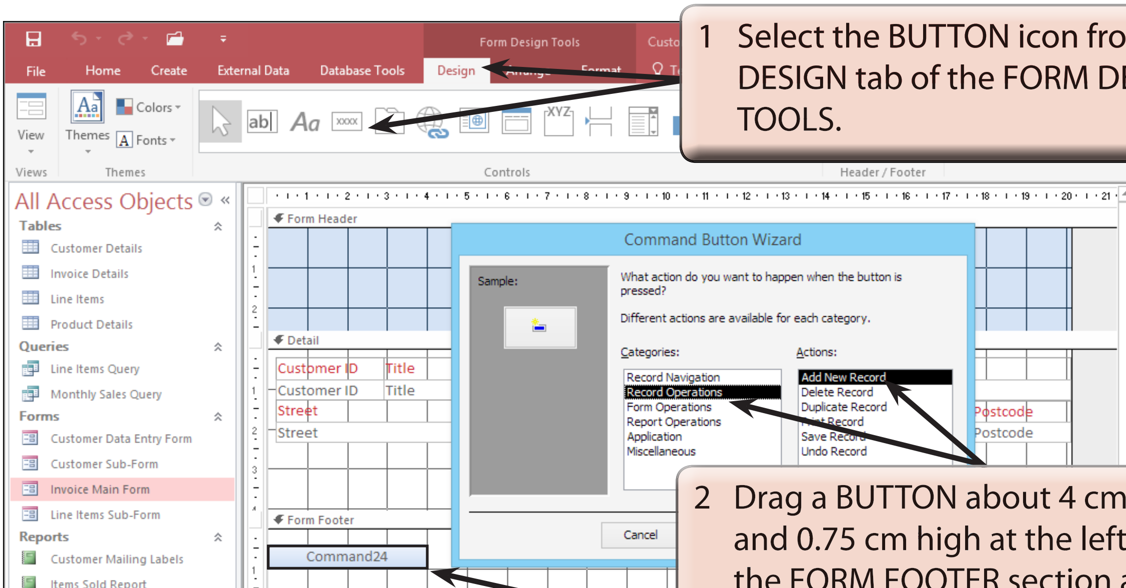
**NOTE: You can SHIFT+CLICK on the field labels and set them to a colour if you wish to.**




10 Set the view to DESIGN VIEW and increase the height of the FORM FOOTER to 1.5 cm by dragging its bottom border down to provide some space for buttons.

## B Adding Buttons to the Form

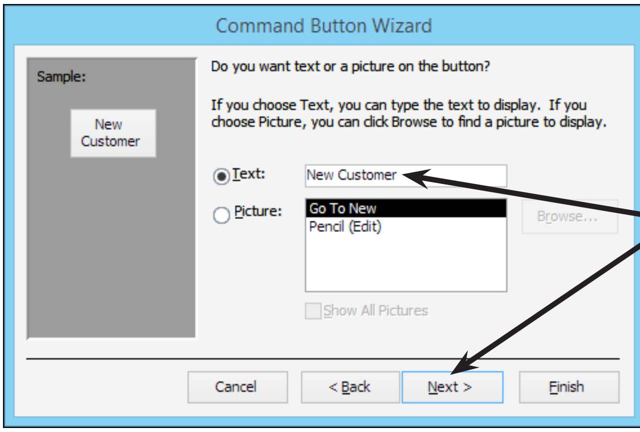
Some buttons can be added to automate the common tasks of the form.




1 Select the BUTTON icon from the DESIGN tab of the FORM DESIGN TOOLS.

2 Drag a BUTTON about 4 cm across and 0.75 cm high at the left of the FORM FOOTER section and, in the COMMAND BUTTON WIZARD dialogue box, select the RECORD OPERATIONS category and the ADD NEW RECORD action.

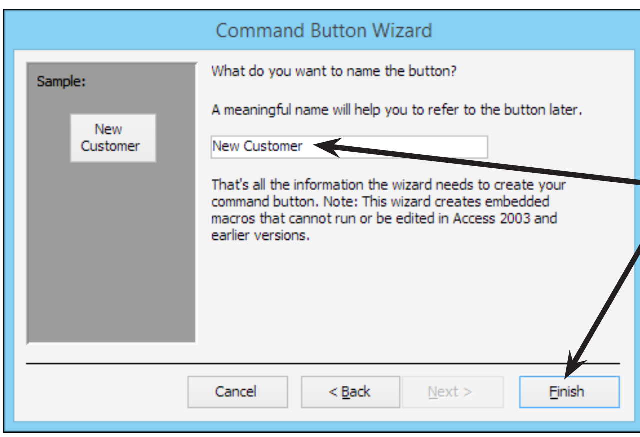
3 Click on the NEXT button to open the next section.




4 Make the button a TEXT button with the text label:

New Customer

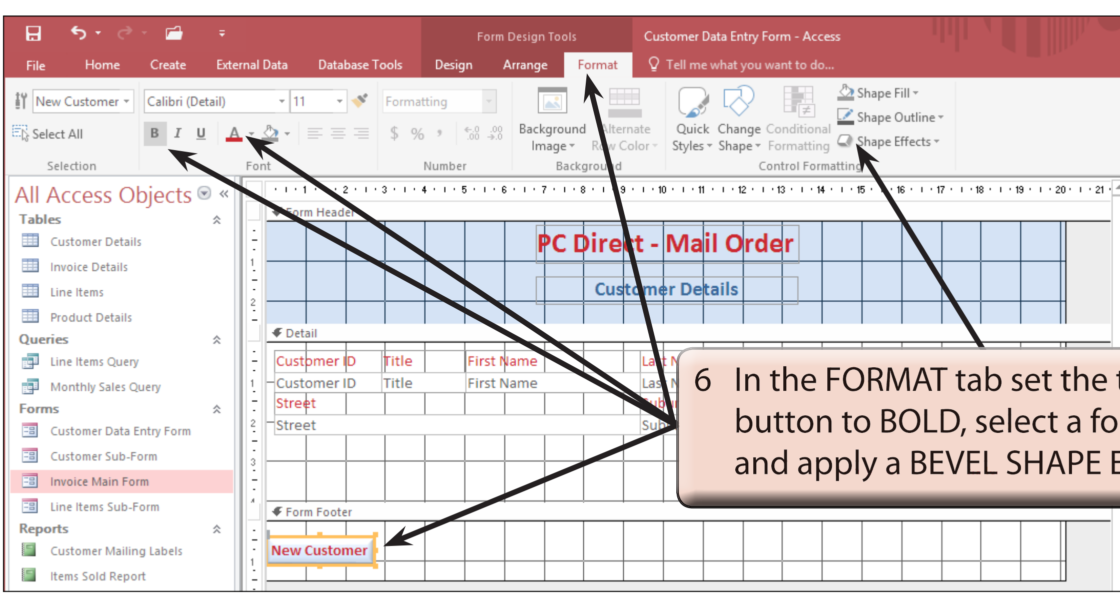
and click on NEXT.




5 Name the button:

New Customer

and click on the FINISH button.




6 In the FORMAT tab set the text in the button to BOLD, select a font colour and apply a BEVEL SHAPE EFFECT.