



## **Checks & Forms 101**

A series of approximately 10 thin, light gray horizontal lines are positioned below the "Checks & Forms 101" header.

## ■ Your forms reflect who you are

The forms you produce are your company's image in the eyes of your customers and vendors. Think about the vendors you work with and how they bill you, or how your customers pay your bills. When you hold a stack of bills in your hand, what impression do they give you of your vendors? When you receive a check from your customers, what impression is made of them? In many cases, how you look on paper is how your business associates perceive you.

MYOB has partnered with RapidForms, the authorized supplier of 100% guaranteed compatible forms for all MYOB products. This brochure will help you integrate MYOB Forms into your business so you can improve your image and get paid faster.

This document will help you understand:

- What part forms play in your business
- How to choose the right forms for your business
- How to order the right forms
- How to customize your checks and forms
- How to file & store your printed forms

## ■ What part does forms play in your business

With MYOB you will invoice your customers for your products or services. You will also pay your vendors for their products and services received. Using the power of the database underneath MYOB, you can automate these important processes to help you:

- Reduce errors
- Save time
- Make repetitive processes more efficient
- Create a paper trail for all transactions

By entering all your customer and vendor information in the Card List, your checks and invoices will be produced based on the information already in MYOB. No more writing checks by hand and no more hard to read invoices. With MYOB customized and computer-generated forms there is less chance for mistakes, misunderstandings or disputes. By maintaining these records, you can also print and mail statements to your customers, providing them with an up-to-date report of how much they owe you.

You've taken the first step toward time saving automation by purchasing MYOB. You'll save time by being able to print all your checks or invoices simultaneously. Printing 10 invoices or checks is certainly much faster than writing them by hand. This gives you an increased level of control over your cash flow and billing. If this saves you an hour a week, it will equal over a week a year. Remember, time is money.

Finally, the paper trail created (in addition to the complete set of reports available) by your check stubs and copies of invoices will help you and your accountant track all your income and expenses. All the forms generated in MYOB represent transactions recorded into your accounting system. All those transactions, and the debits and credits behind them, are available via MYOB's reporting system and inquiry screens. Having a proper paper trail of these transactions (and datafile backups!) is an investment worth making.

**Order your checks & forms, and  
more...now!**

## ■ How to choose the right forms for your business

With MYOB you have a wide range of choices for compatible checks and forms. This brochure includes all the forms available to help you select the ones that are right for you. You can also visit our forms website at <http://www.rapidforms.com/myob>.

### **Your Printer**

The first step is to determine what type of printer you will be using. You will most likely be using one of the following types:

- An inkjet printer (uses ink cartridges)
- A laser printer (uses toner cartridges)
- An impact printer (uses a ribbon)

If you have an inkjet or laser printer, you will typically select 1-part forms or 1-up checks. These forms have one part, are not attached together and contain one check or invoice per page. You can get some collated 2 part forms for these printers. With these forms, you would need to change your computer's print settings to print 3 of each form.

If you have a dot matrix (impact) printer, you will need continuous forms. These are the forms that have the detachable parts, holes on the sides and come in 2-3-4 and 5 part forms. Impact printers are not as popular as they used to be, primarily because the networkability and quality of laser and inkjet printers.

You cannot use continuous forms in an inkjet or laser printer. You can use inkjet or laser forms on an impact printer, but that can be a frustrating experience. Keep in mind, MYOB is a database, you can always choose to reprint any document, form or report. Having multiple physical copies of forms is not a necessity, especially if you keep a good set of printed reports and backups of your MYOB company file.

### **Your products and services**

Depending on the type of products and services you offer, we have different forms available for you. You can choose from item based forms, service based forms or multipurpose forms for your invoices. For checks, you can choose to have check stubs or not, and select a different color check for each bank account.

You can also create your own custom look, either using the tools available inside MYOB's forms customizer or through preprinted forms. MYOB Forms can help you design a specific look and feel for your preprinted forms and other business correspondence and collateral materials to help you project the image you want. You can contact MYOB Forms at 888-675-4455. You can also request a sample pack of forms to help you decide what works best for you.

## ■ How to order the right forms

Ordering MYOB Forms is easy:

- The toll free number for MYOB forms is 888-675-4455.
- You can fax your order to 800-451-8113.
- You can visit our online store at <http://www.rapidforms.com/myob>

**NOTE:** To be sure you're ordering genuine MYOB-compatible forms, include **20102412** as your KEYCODE on your fax or web order.

To determine what quantity of forms you need in the first year, follow this simple formula:

- How many of each form do you issue in a month?
- Add 50% to that number
- Multiply by 12 and round up to the nearest 500
- That is the number of forms you should order.

For example, if you write 50 checks a month:  $50 + 50\% = 75 \times 12 \text{ months} = 900 \text{ checks}$   
Round that up to 1000 – that's how many checks you should order. Repeat the process for each type of form you plan to order.

When do you reorder your forms? That's easy, when you are 80% through your current inventory. But, prior to reordering, take 5 minutes to review your current forms. Ask yourself:

- Have you had any problems with them?
- Are you ready to add color, text, logos, graphic or other custom elements?
- Do your forms match your letterhead, business cards and other collateral materials?
- Have you taken advantage of the customization options within MYOB?

## ■ How to Customize Checks & Forms

All forms are customizable in MYOB. For checks, go to the Banking Command Center and select Print Checks. For invoices or statements, go to the Sales Command Center and select Print Invoices or Print Statements. For Purchase Orders, go to the Purchases Command Center and select Print Purchase Orders.

This will open the Forms Selection window. Click the Customize button at the bottom of the window and this is where you will customize your forms. To begin, you start by customizing the existing Plain Paper form or the Pre-Printed form. The toolbar in the Customize window will allow you to:

- Add new data fields
- Add a text box
- Create a picture field
- Rectangle tool
- Line tool
- Undo tool
- Send to back
- Bring to front
- Get field information
- Modify the properties of the form
- See a full page layout of the form



By adding and arranging new fields, pasting your logo, adding color, creating boxes and lines, and modifying the forms and fields, you can create the perfect form to print on your custom invoice paper.

Once customized to your liking, click Save Form As, and name your new form template. The next time you open the Print window, your new template will appear in the Selected Form drop down menu along with the default Plain Paper form and Pre-Printed forms. Refer to your MYOB documentation for detailed help in customizing your specific forms.

## ■ How to properly file and manage your printed forms

What do you do with all these forms after the fact? Since you have a computerized system, the need for copies of each document is minimized.

If you choose multiple part forms, you'll obviously keep one copy in your records.

For customer invoices, you can:

- File copies of invoices by customer – one folder for each client *or*
- File copies of invoices by date – one folder for each week or month *or*
- File copies of invoices by form number – one folder for each hundred or so forms

For check stubs, you can:

- File check stubs along with your paid bills, by vendor or form number *or*
- Keep check stubs by month

Whatever system you choose to use, keep in mind there are internal control issues, security issues, and tax implications that will make easy access to these records necessary. Each year, you'll want to move all these records to storage and keep them for up to seven years. Check with your accountant and get their advice on what you should keep and for how long.

Also, be careful where you store your inventory of unused forms, especially your checks. Do not give anyone the opportunity to access these forms. Also, be sure to store them in a flat, dry space for better results. When you add more forms to your printer, be sure to 'fan' them out to let the paper breathe.

Your forms represent you and your business. Having customized, professional, compatible, 100% guaranteed forms is an investment in your future success, not an expense. Taking advantage of the capabilities of MYOB can help you create just the look you want to convey. Tying that look into the rest of your collateral materials, and your website, is easy to do and very flexible.

With MYOB Forms, you can be confident that made the right choice, 100% guaranteed!

## ■ and more...

Personalized items do an excellent job of showing off your corporate image, telling everyone who you are and what you do. Your customers, vendors and prospects will remember these items and immediately see your organization as one that is built on quality. Never miss an opportunity to convey a positive impression of your business.

MYOB Forms also offers other unique products and services to start, manage and grow your business, they include:

- Promotional products
- Post cards
- Greeting cards
- Holiday cards
- Business cards
- Labels
- And of course, Business and Tax forms

You'll be surprised to learn that we also provide specialized apparel and personalized items to promote and sell your business.

## ■ Still Need Help?

You can also work an independent MYOB Certified Consultant in your community who are experts in helping you get the most out of your MYOB product. A list of these local experts is included with your software and is online at <http://www.myob.com/us/service/consultants/>.

# Ten reasons why MYOB Forms are the best!

## **1. 100% compatible with MYOB products.**

MYOB forms and checks are guaranteed to work with MYOB products.

## **2. FREE standard logo.**

Add a little pizzazz to your forms and checks. Get a free standard logo printed on your checks and forms when you order from MYOB Forms. Choose from more than 700 logos!

## **3. 100% Guaranteed acceptance.**

MYOB checks meet the acceptance standards established by the American Banking Association. Your checks are 100% guaranteed to be honored by every bank, savings and loan, credit union, and any other financial institutions.

## **4. Guaranteed satisfaction.**

If you are not completely satisfied with your order for any reason, just, return the unused items and we will refund your money or replace the products free of charge.

## **5. Free samples.**

Not sure? Request a free sample of the line of forms for your MYOB product before you buy.

## **6. Great service.**

Toll-free ordering with extended hours of operation for your convenience. Just call toll-free 888-675-4455 (8 a.m. - 8 p.m. ET Monday through Friday and 8 am-12 pm ET Saturday) or fax 800-451-8113 (24 hours a day). Be sure you mention your KEYCODE which is highlighted in yellow on your brochure. You can also order online at [www.rapidforms.com/myob](http://www.rapidforms.com/myob).

## **7. Professionally designed.**

MYOB forms and checks have been designed by our forms professionals to project a solid business image to your customers and clients.

## **8. Custom forms.**

Create your own custom look. Do you have an idea or know exactly what you want in a custom form or check? Tell us and we'll design the form around your requirements.

## **9. Speedy delivery.**

Your order will ship in 4-6 business days.

## **10. Free Shipping.**

If you prepay your order by check or money order, we will pick up the shipping charges. (shipping is UPS ground in continental US. Credit card payment not included).

