"Check Writer Layout"

Description of Problem:
1. Customer needs to set up their check writer layout

Symptoms/Issue(s):
1. N/A

Solution:

Updating the Default Production Layout

1. Go to Maintenance->Check Writer Layout
2. Select "Original (Production)" from the drop-down menu (Default Option)
3. Click Copy, Verify the following and then click OK:
   a. Check Layout Type = Original
   b. Production to Prototype Option is select
   c. Layout Type Selected = Production
4. Select "Original (Prototype)" from the drop-down menu
5. Click edit
6. Make changes as needed
7. Click save
8. Click copy>>Select pre-printed and blank check stock and click OK

Creating a Custom Layout
1. Go to Maintenance->Check Writer Layout
2. Select "Original (Production)" from the drop-down menu (Default Option)
3. Click Copy, verify the following and then click OK:
   a. Check Layout Type = Original
   b. Production to Prototype Option is select
   c. Layout Type Selected = Production
4. Select Original (Prototype) from the drop-down menu
5. Click Edit
6. Change the Name of the Layout to the custom name that is needed
7. Make Changes to check layout as needed and click save
8. Click copy->select the appropriate check type **AND** the bank account(s) that the layout should be associated with and click OK
9. Review the confirmation message and click OK
10. Go to Maintenance>>Companies
11. Select the company that will be using the custom layout

12. Click Edit>>Advanced>>Click on the "Bank Account" tab
13. Select the bank account and pick the Custom Layout that has been created (you named it earlier)
14. Close the advanced settings window and then click save
15. Repeat steps 10-14 for each bank account that is using the custom layout

Editing a Custom Layout

1. Go to the current bank account that is using the custom layout and notate the name of the check layout. This can be found in Maintenance->Companies->Advanced->Bank Account tab->layout
2. Go to Maintenance->Check Writer Layout
3. Select "Original (Production)" from the drop-down menu and then select the Custom Check Layout
4. Click Copy->Select the custom name of the layout from the drop-down menu and click OK.
5. Select Original (Prototype) from the drop-down menu (The name of the layout should match the option selected in Step #3
6. Click Edit
7. Make changes to the check layout as needed
8. Click Save
9. Click Copy->The bank account(s) using this layout will already be selected, **unless you are adding additional Banks to the layout, no changes are needed in this area.**
10. Click OK

Detailed Solution:

How do you resolve the issue, with included screen shots:

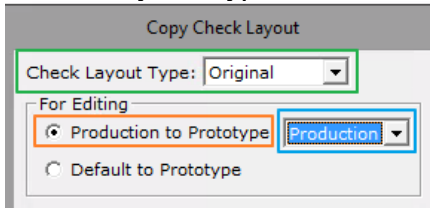## Updating the Default Production Layout

1. Go to Maintenance->Check Writer Layout
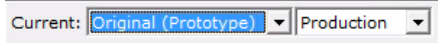2. Select "Original (Production)" from the drop-down menu (Default Option)
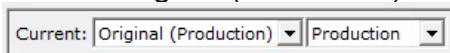
3. Click Copy, Verify the following and then click OK:

      a. Check Layout Type = Original
      b. Production to Prototype Option is select
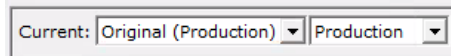   c. Layout Type Selected = Production

4. Select "Original (Prototype)" from the drop-down menu
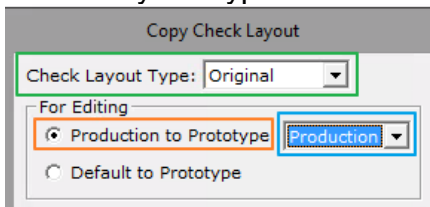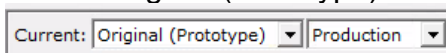

5.
6. Click edit
7. Make changes as needed
8. Click save
9. Click copy>>Select pre-printed and blank check stock and click OK

Creating a Custom Layout

1. Go to Maintenance->Check Writer Layout
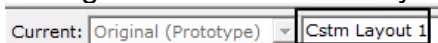2. Select "Original (Production)" from the drop-down menu (Default Option)

3. Click Copy, verify the following and then click OK:
      a. Check Layout Type = Original
      b. Production to Prototype Option is select
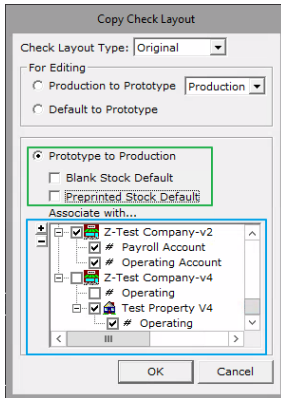   c. Layout Type Selected = Production

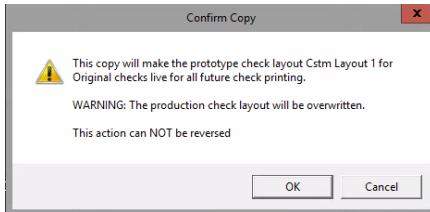4. Select Original (Prototype) from the drop-down menu

5. Click Edit
6. Change the Name of the Layout to the custom name that is needed

7. Make Changes to check layout as needed and click save
8. Click copy->select the appropriate check type **AND** the bank account(s) that the layout should be associated with and click OK

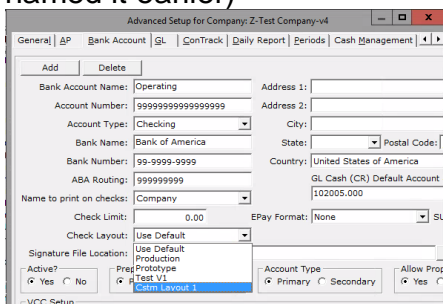9. Review the confirmation message and click OK

10. Go to Maintenance>>Companies
11. Select the company that will be using the custom layout
12. Click Edit>>Advanced>>Click on the "Bank Account" tab
13. Select the bank account and pick the Custom Layout that has been created (you named it earlier)

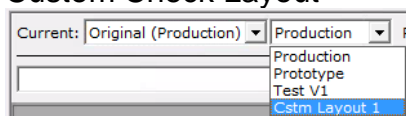14. Close the advanced settings window and then click save
15. Repeat steps 10-14 for each bank account that is using the custom layout

Editing a Custom Layout

1. Go to the current bank account that is using the custom layout and notate the name of the check layout. This can be found in Maintenance->Companies->Advanced->Bank Account tab->layout
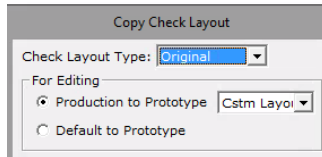2. Go to Maintenance->Check Writer Layout
3. Select "Original (Production)" from the drop-down menu and then select the Custom Check Layout
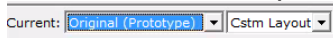
4. Click Copy->Select the custom name of the layout from the drop-down menu and click OK.

5. Select Original (Prototype) from the drop-down menu (The name of the layout should match the option selected in Step #3

6. Click Edit
7. Make changes to the check layout as needed
8. Click Save
9. Click Copy->The bank account(s) using this layout will already be selected, **unless you are adding additional Banks to the layout, no changes are needed in this area.**
10. Click OK

Notes/Addendums:

- Only edit the layout in the Original (Prototype) option. Do not use any other of the options in the drop down to edit.
- Do not change the Original (Production) template. Once you copy it to Original (Prototype) change the name and save it as that name so that the Original (Production) template stays intact.

Category:
<Technical>   <Accounting Core\Check Writer\Check Writer Layout>