



## ***Forms Planning Guide***

## Using The Forms Planning Guide

<b>Completed by:</b>	Project Leader
<b>Purpose:</b>	To plan for printing of forms required for FACTS.
<b>How it is used:</b>	<p>Review the Forms Planning Checklist, Sample FACTS Forms and complete the Forms Survey for Implementation and Installation. Fax the completed Forms Survey to your FACTS Implementation Consultant.</p> <p>If you plan to use custom forms, your FACTS Implementation Consultant will work with you to provide an estimate and ensure that any required changes are made to the FACTS software.</p>
<b>When it is used:</b>	Complete during Project Strategy
<b>Who uses it:</b>	Local FACTS Office and Customer
<b>File under:</b>	Planning/Project Strategy
<b>Last revised:</b>	05/01
<b>File:</b>	<p>Forms Planning Guide.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

## Forms Planning Checklist

FACTS allows the flexibility of printing on computer paper (non-preprinted) or printing on custom (preprinted) forms. To properly plan for your system installation we have developed a checklist that can assist you in your forms planning efforts.

- ☐ Forms must be properly planned for at least six to eight weeks prior to going live.
- ☐ Determine what forms are needed based on the FACTS applications purchased.
  - Review the FACTS Sample Forms to understand all FACTS forms printing.
  - Review the FACTS Forms Catalog (1-800-261-9674)
- ☐ Decide on the type of forms you require:  
Software Solutions Forms Division (SSFD) provides the following preprinted forms:
  - a. **Standard Stock**
    - Choice 1** - These forms are available for next-day shipment to you. They are void of your personal company imprinting. FACTS provides the tool set that allows you to personalize your company information on these standard stock forms.
    - Choice 2** - These same forms are available with your personalized company information crash imprinted in black ink only. Allow 5-7 days for delivery of crash imprinted forms.
  - b. **Preset Custom** forms follow the same format as standard stock which can be customized with modified headings, custom colors, backgrounds, additional parts, and various other options to meet your specific needs. (Allow 3-5 weeks.)
  - c. **Designed Custom** forms allow you to create a customized form for your very specific needs. Expertise is available to assist with this process, both in programming and forms design. (Allow 3-5 weeks.)
    - Refer to the sample cut-sheet forms provided. Please note the standard stock and preset custom forms are included in the sample cutsheet forms. See the forms catalog for cross-reference.
    - Complete the following Forms Survey with your appropriate responses and fax to your local Software Solutions Forms Division representative indicated on the bottom of the survey.
- ☐ Prior to ordering any Preset or Designed custom forms, we strongly recommend that all proofs are verified by your local FACTS office.
- ☐ If Preset or Designed custom forms are ordered, finished approved forms must be received by local FACTS office no later than two (3) weeks prior to your live date. This is to allow time for programming and testing of customizations.

## Forms Survey

1. What release level of FACTS are you installing? \_\_\_\_\_

2. Which forms are you currently using or which would you like to use?

Form Name	Form Length Required	# of Parts	*Usage per Month	Live Date	Custom or Standard Form Required	# of Samples Needed
Invoice Option #1 (#1001)	7, 8 1/2, or 11					
Invoice Option #2 (#1002)	7, 8 1/2, or 11					
A/R Invoice (#1003)	7, 8 1/2 or 11					
A/P Check (#1005)	7					
Payroll Check (#1006)	7					
Purchase Order (#1007)	7, 8 1/2, or 11					
AR Statement (#1008)	7, 8 1/2, or 11					
Quotation Form (#1009)	7, 8 1/2 or 11					
Job Cost Invoice (#1010)	7, 8 1/2 or 11					
Job Cost Estimate (#1011)	7, 8 1/2, or 11					
Transfer Ticket (#1012)	7, 8 1/2, or 11					
Picking/Packing List (#1013)	7, 8 1/2, or 11					
Past Due Notice (#1015)	7, 8 1/2 or 11					
Counter Sales Receipt (#1016)	7, 8 1/2, or 11					
UPS Shipping Label (#1017)	6 1/2 x 3					
Bill of Lading (#1018)	11					

\* Please allow for a 10% overage per month.

3. What quantity do you purchase at a time?    3 months          6 months          12 months          Other: \_\_\_\_\_  
(We recommend no more than 6 months supply and no less than a 90 day supply.)

4. Would you like samples of standard stock forms?    Yes          No

Your Company Name: _____		
Address: _____		
City: _____	State: _____	Zip: _____
Forms contact: _____		
Telephone: _____	Fax #: _____	
Local FACTS office: _____		
Implementation Consultant: _____	Telephone: _____	
SSFD Rep.: _____	Fax #: _____	

Please fax this completed survey to your Facts Implementation Consultant.

## FACTS Forms

The following is a list of forms used by FACTS. The parameters/information section indicates where to setup printing of the specific form in the FACTS system. Other information describes the type of label/form required.

FACTS offers two types of forms printing - preprinted and non-preprinted. Preprinted means that FACTS will print data only on your custom form. Whereas non-preprinted means that FACTS will print all column/row lines, field labels, etc., as well as data in designated areas on the form.

**Note:** Any changes made to the standard forms will require program modifications.

Module	Form	Parameters/Information
Accounts Payable	* Check 1099 Vendor Label Vendor Rolodex Card	AP Check Print Control F/M Tax Forms available from SSFD 3.3 x 15/16 2-up Detached - 4 x 2-1/6
Accounts Receivable	Customer Label Customer Rolodex Card * Dunning Letter * Invoice * Statement	4-up 3.3 x 15/16 2-up Detached - 4 x 2-1/6 Dunning Letter Control F/M Invoice Processing Control F/M Statement Print Control F/M
Inventory Control	* Transfer Ticket Item Label Bar Code Item Label	IC Static Control F/M 4-up 3.3 x 15/16 1-up 5 x 1
Job Cost	* Estimate * Invoice	JC Static Control F/M JC Static Control F/M
Payroll	* Check W-2 Employee Label	AP Check Print Control F/M Tax Forms available from SSFD 4-up 3.3 x 15/16
Purchase Orders	* Purchase Order	PO Static Control F/M
Office Automation	Mailing Label Print	4-up 3.3 x 15/16 Mailing Label F/M
Sales Orders	* Quote * Pick Ticket * Invoice * Counter Sale Receipt Shipping Label * UPS Shipping Label UPS C.O.D. Label Print	Document Print Control F/M Document Print Control F/M Document Print Control F/M Document Print Control F/M 4-1/8 x 2-15/16 No Parameters to set Provided by UPS

\* Sample form is available from SSFD.

The following forms fit on an 80 column printer in 10 CPI:

- AP 1099
- AP Vendor Rolodex Card
- AR Vendor Rolodex Card
- AR Invoice without Tear-Off
- AR Dunning Letter (Past Due Notice)
- AR Statement without Tear-Off
- IC Bar Code Item Label
- JC Estimate without Tear-Off
- JC Invoice without Tear-Off
- PR W-2 (1-UP)
- SO Shipping Label
- SO UPS Shipping Label
- SO UPS C.O.D. Label Print

The following forms require a 132 column print in 10 CPI:

- AP Check
- AP Vendor Label
- AR Customer Label
- AR Invoice with Tear-Off
- AR Statement with Tear-Off
- IC Transfer Ticket
- IC Item Label
- JC Estimate with Tear-Off
- JC Invoice with Tear-Off
- PR Check
- PR Employee Label
- PR W-2 (2-UP)
- PO Purchase Order
- SO Quote
- SO Pick Ticket
- SO Invoice #1
- SO Invoice #2
- SO Counter Sale Receipt
- OA Mailing Label