Formatting Invoice Systems

In the previous chapter you setup the structure of an invoicing system. In this chapter that system will be formatted into an easier to use and printable invoice. This will involve setting lookup values for the customers and products so that the user doesn't need to know customer or product names. The invoice elements will be aligned so that they print in a neat fashion and a border and page break will be inserted.

Loading the 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 ACCESS STORAGE folder.

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

(A)   Load Microsoft Access or close the current database and click on the OPEN icon in the BACKSTAGE VIEW.

(B)   Access the CHAPTER 13 folder of the ACCESS 2010 SUPPORT FILES and open the CHAPTER 13 file as an OPEN READ-ONLY file.

(C)   Click on the FILE tab and select SAVE DATABASE AS.

(D)   Access your ACCESS STORAGE folder and save the file as CHAPTER 13 COPY.

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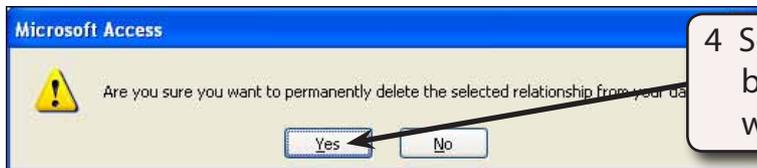
Setting Lookup Values

It is difficult to remember customer or product codes. We can set both of these to be lookup values. In order to use the lookup wizard any the relationships involving the fields that will be altered will need to be temporary deleted.

A   Deleting the Customer Relationships

1   Close any tables or forms that may be open.

2   Open the DATABASE TOOLS tab in the RIBBON and click on the RELATIONSHIPS icon to open the RELATIONSHIPS window.
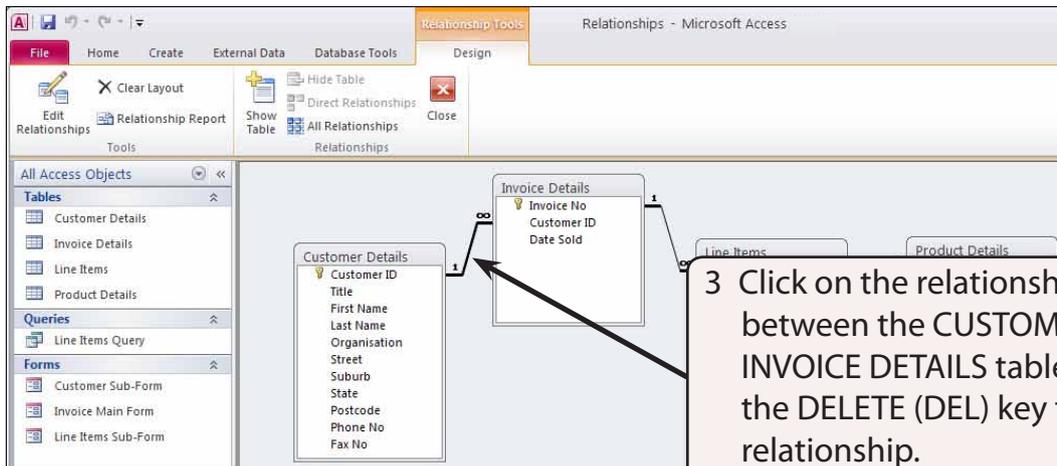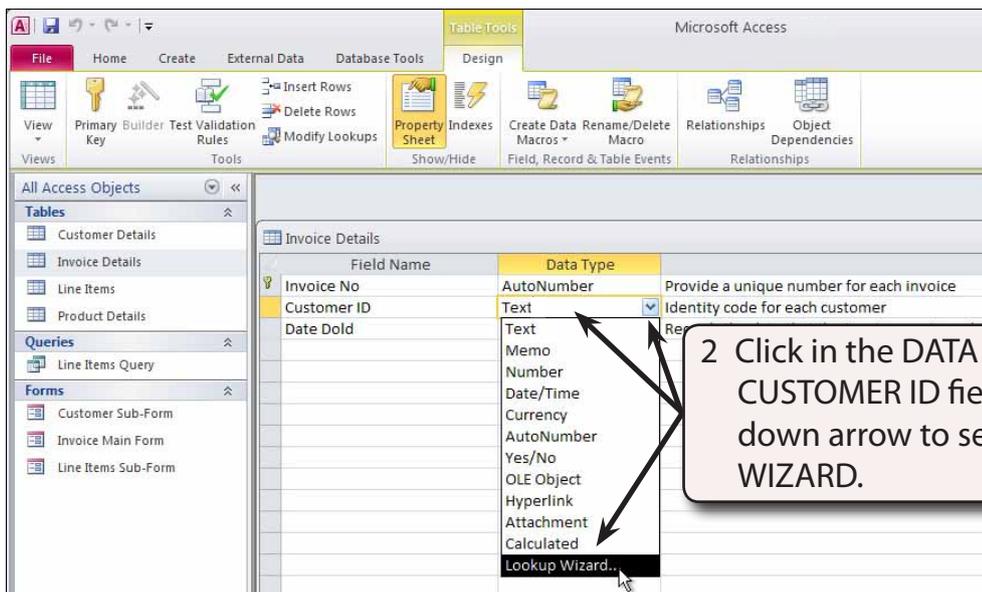
3 Click on the relationship line between the CUSTOMER DETAILS and INVOICE DETAILS tables and press the DELETE (DEL) key to remove the relationship.
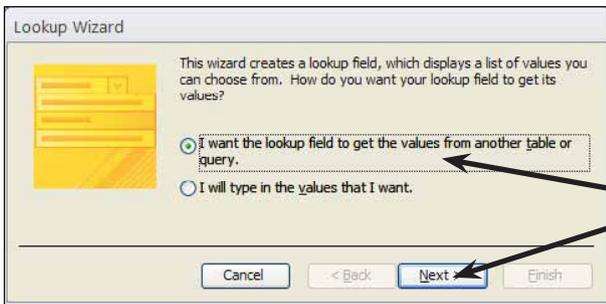

4 Select YES to the warning dialogue box and close the RELATIONSHIPS window.
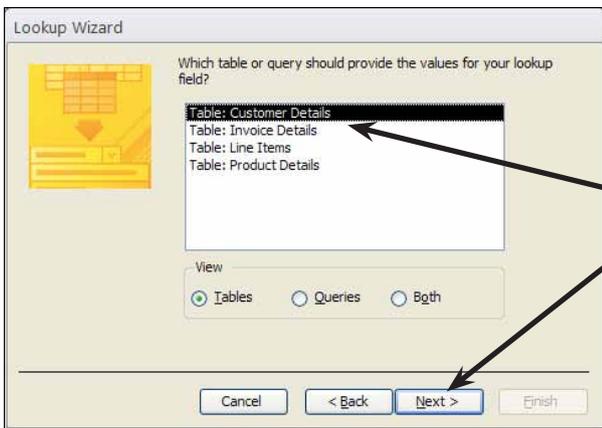
B   Setting the Customer Lookup Values

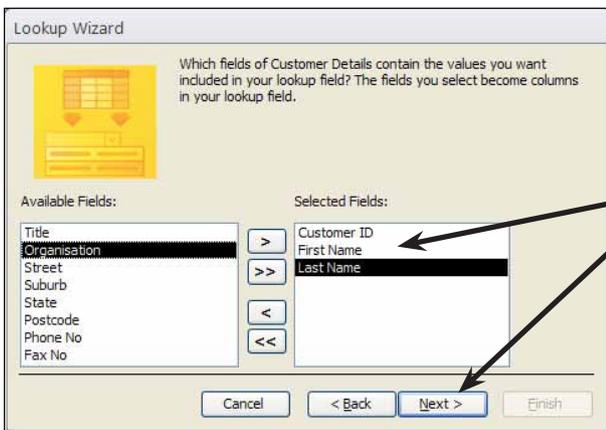1   Open the INVOICE DETAILS table and set its view to DESIGN VIEW.

2 Click in the DATA TYPE cell for the CUSTOMER ID field and use its down arrow to set it to the LOOKUP WIZARD.
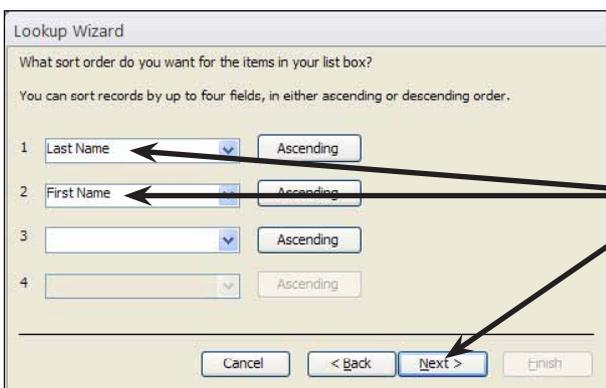
3 In the first LOOKUP WIZARD dialogue box, leave the first option (lookup values from a table or query) selected and click on NEXT.


4 Leave the CUSTOMER DETAILS table selected and click on NEXT.

5 You will be asked which fields you want to be displayed in the lookup column. Move CUSTOMER ID, FIRST NAME and LAST NAME into the SELECTED FIELDS frame, then click on NEXT.


6 You will be asked about the SORT ORDER of the list. Set the first box to LAST NAME and the second box to FIRST NAME (both fields should be set to ASCENDING order), then click on NEXT.
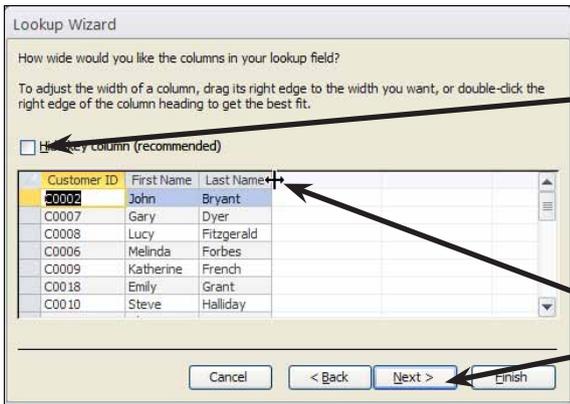
7 The width of the columns will be displayed. The CUSTOMER ID field is hidden, click on the HIDE KEY COLUMN check box to display it.
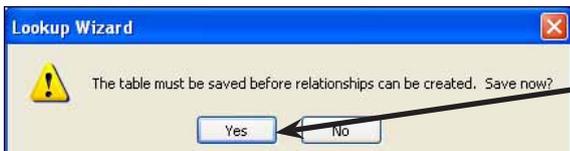
8 Reduce the width of the columns double clicking on the borders at the right of the column headings, then click on NEXT.
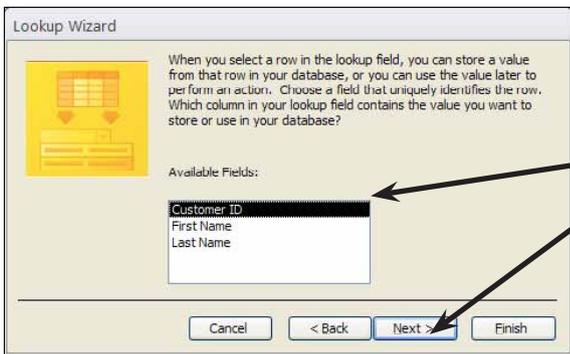
9 In the AVAILABLE FIELDS screen leave CUSTOMER ID selected. This is the value we want inserted from the popup menu, then click on NEXT.
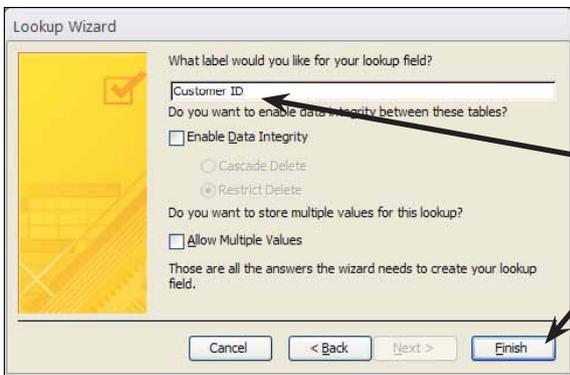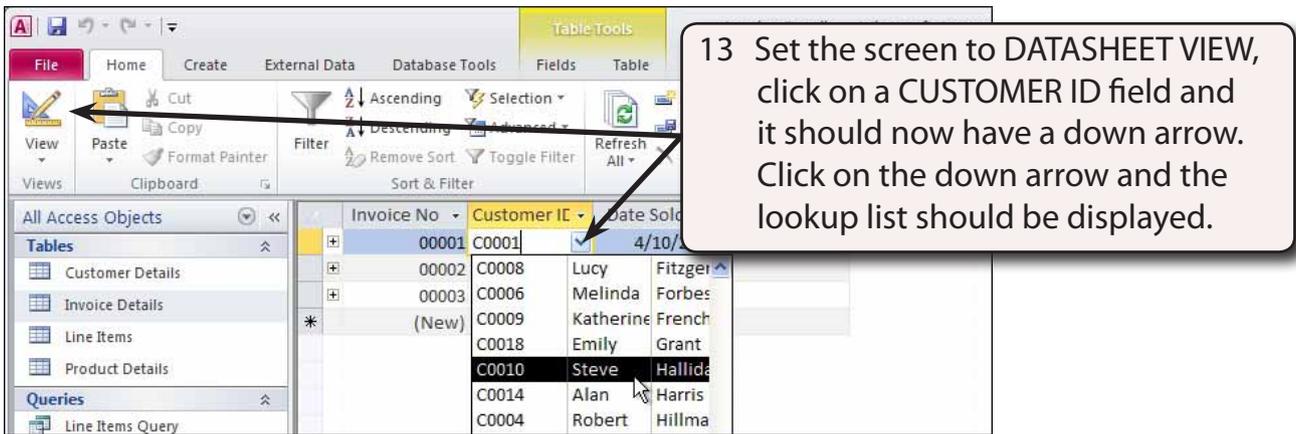

10 Leave the label set to:

Customer ID

and click on the FINISH button.

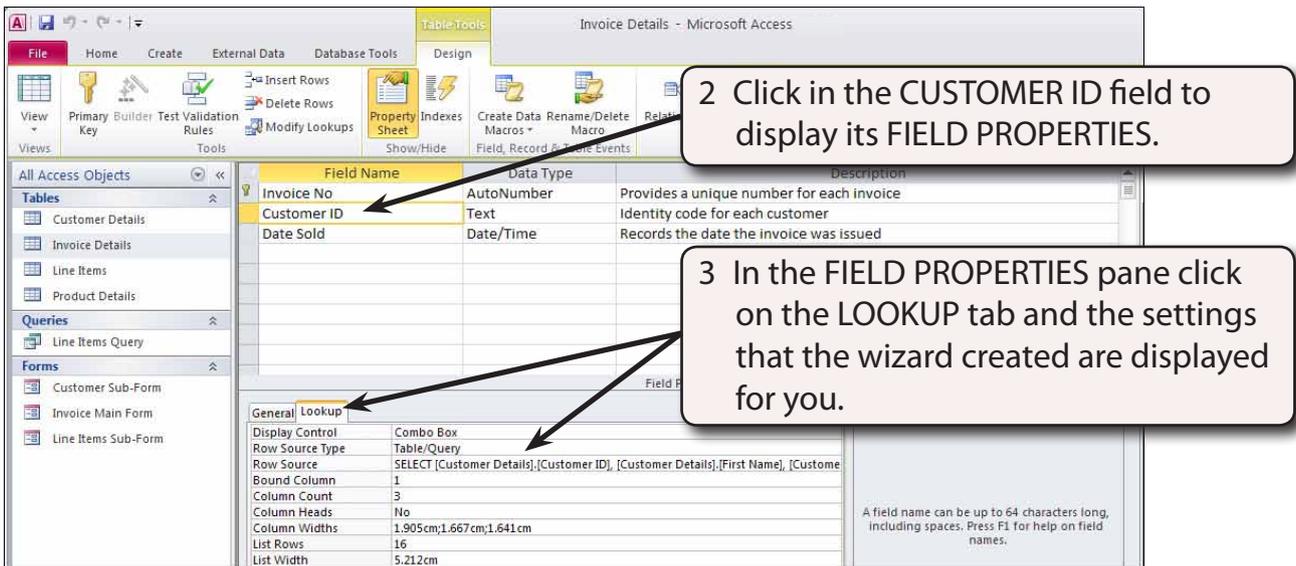11 You will now be required to save the table - click on YES.

12 If a warning box appears - select YES. This may occur if some of the column widths are too small.

13 Set the screen to DATASHEET VIEW, click on a CUSTOMER ID field and it should now have a down arrow. Click on the down arrow and the lookup list should be displayed.

14   Leave C0001 selected for now by clicking outside the drop down menu.

C   Looking at the Customer Lookup Settings

1   Set the INVOICE DETAILS table back to DESIGN VIEW.

2 Click in the CUSTOMER ID field to display its FIELD PROPERTIES.

3 In the FIELD PROPERTIES pane click on the LOOKUP tab and the settings that the wizard created are displayed for you.

4   Once you understand what the wizard is doing you can enter the values manually. This saves the need to delete a relationship before setting a popup list.

5   Close the table.