

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.

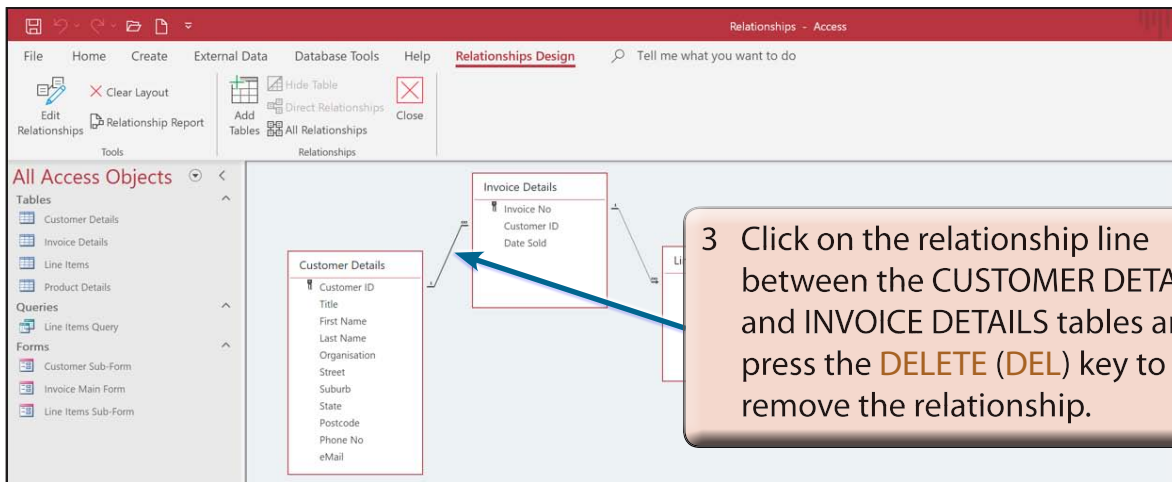
- 1 If your invoice system from the previous chapter worked well, load Microsoft Access and open the file from your STORAGE folder.
- 2 If you would prefer to use a fresh fully operational file:
 - (A) Load Microsoft Access and select OPEN in the START window or close the current file and select OPEN in the FILE tab.
 - (B) BROWSE to the CHAPTER 15 folder of the ACCESS 2022 SUPPORT FILES and open the CHAPTER 13 COPY file as an OPEN READ-ONLY file.
 - (C) Click on the SAVE AS button 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.

Setting Lookup Values

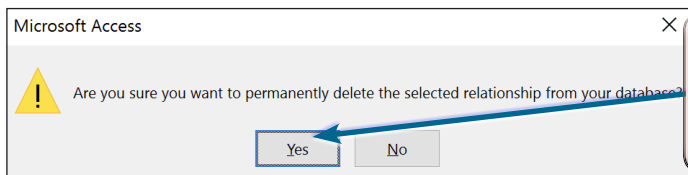
It is difficult to remember customer or product codes. We can set both of these to be lookup values. In order to use the lookup wizard any the relationships involving the fields that will be altered will need to be temporary deleted.

A Deleting the Customer and Product Relationships

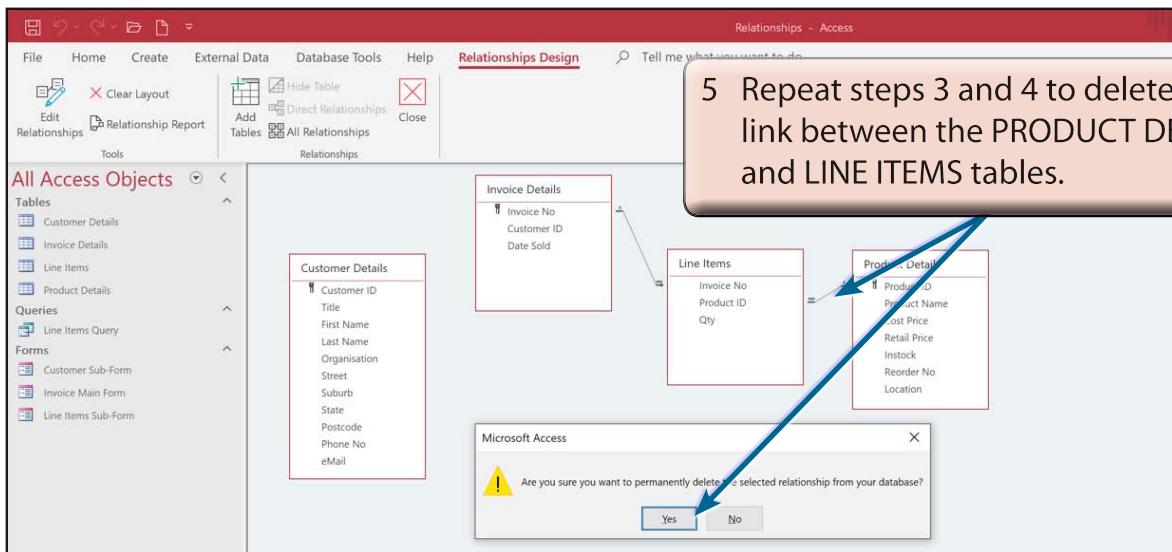
- 1 Close any tables or forms that may be open.
- 2 Open the DATABASE TOOLS tab in the RIBBON and click on the RELATIONSHIPS icon to open the RELATIONSHIPS window.



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.

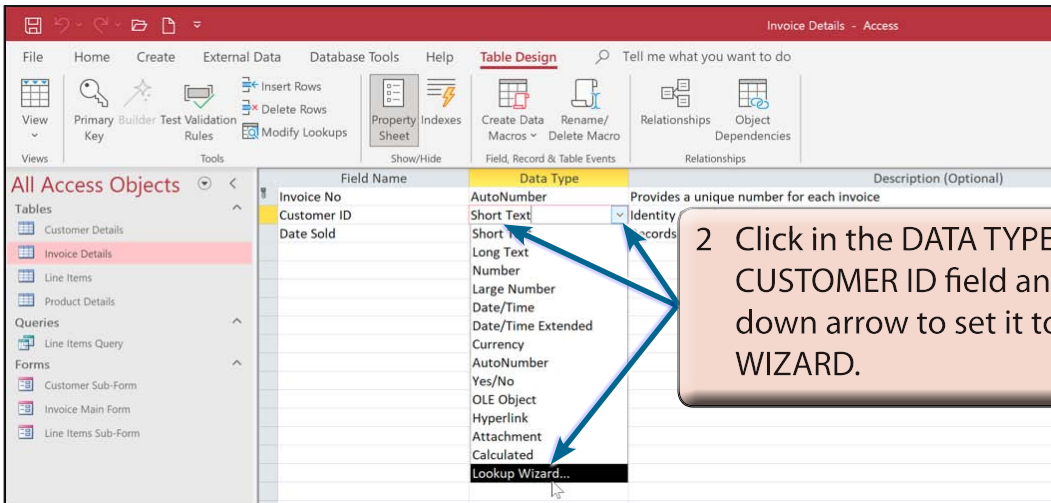


5 Repeat steps 3 and 4 to delete the link between the PRODUCT DETAILS and LINE ITEMS tables.

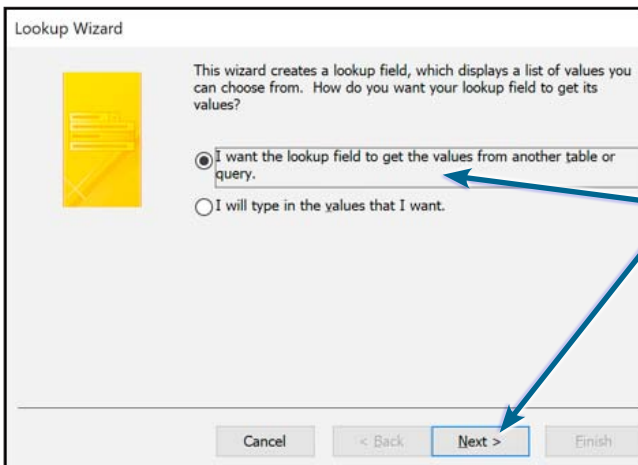
6 Click on the **CLOSE** icon in the **RIBBON** to close the RELATIONSHIPS window.

B Setting the Customer Lookup Values

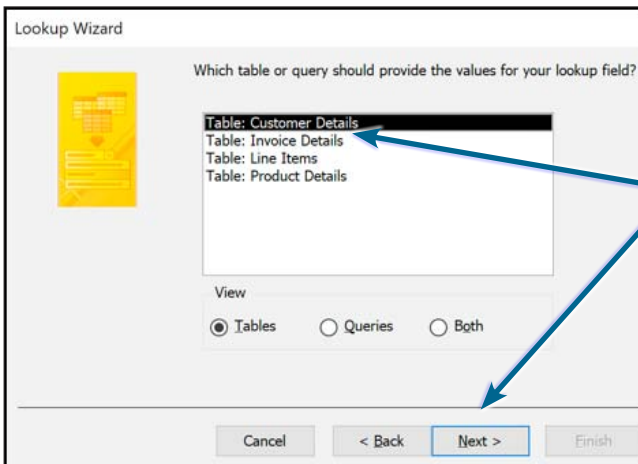
- 1 Open the INVOICE DETAILS table, MAXIMIZE it and set its view to DESIGN VIEW.



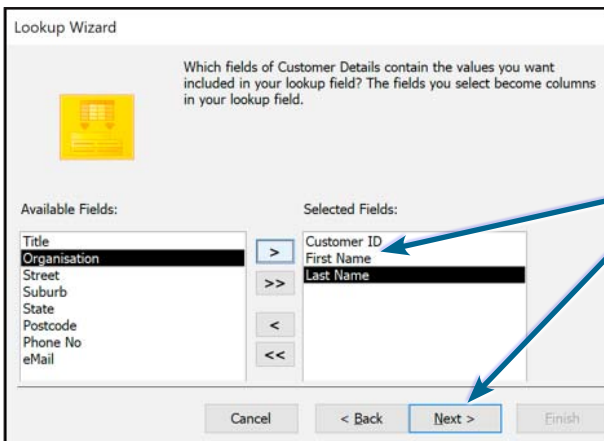
2 Click in the DATA TYPE cell for the CUSTOMER ID field and use its down arrow to set it to the LOOKUP WIZARD.



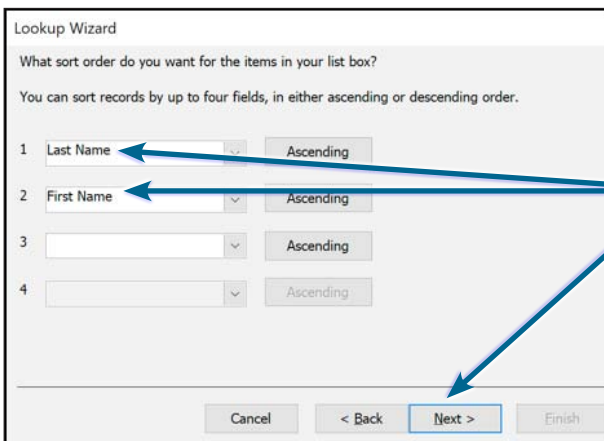
3 In the LOOKUP WIZARD dialogue box, leave the first option (lookup values from another table or query) selected and click on NEXT.



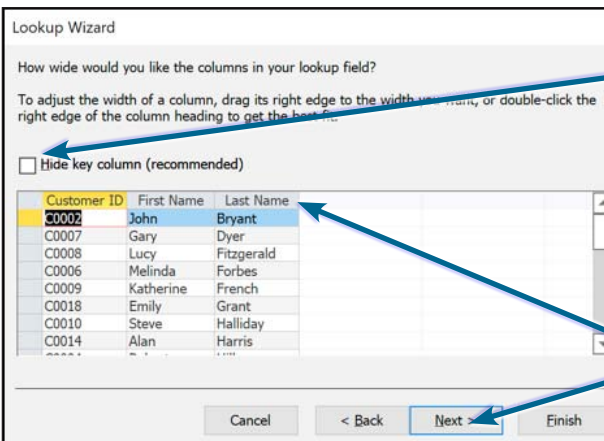
4 Leave the CUSTOMER DETAILS table selected and click on NEXT.



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

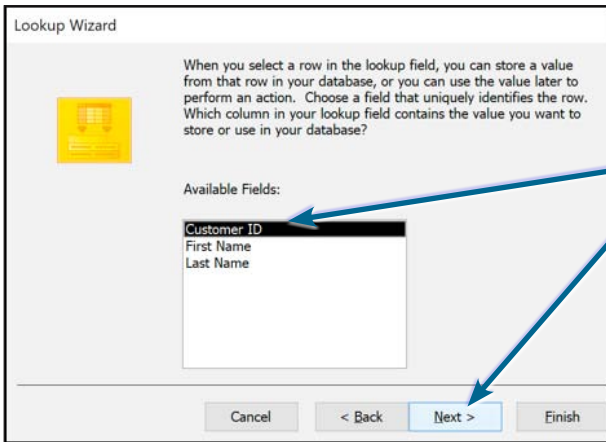


6 You will be asked about the SORT ORDER of the list. Set the first box to LAST NAME and the second box to FIRST NAME (both fields should be set to ASCENDING order), then click on NEXT.

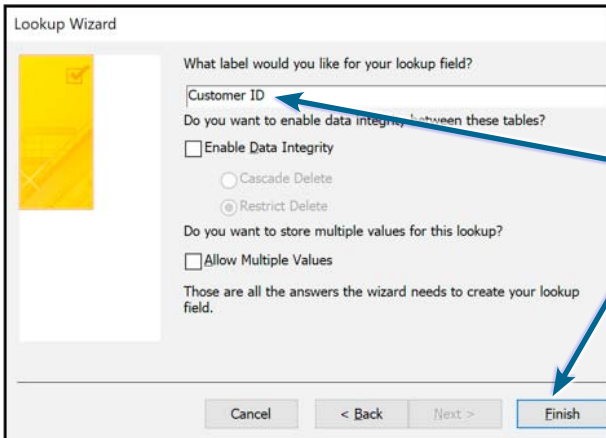


7 Normally the CUSTOMER ID field is hidden but, in this case, it will be easier with it seen, so uncheck the HIDE KEY COLUMN check box to display it.

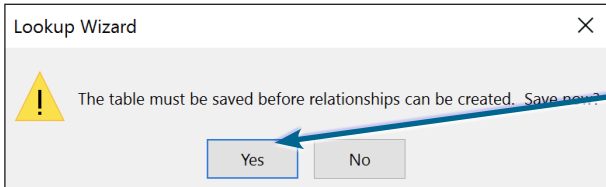
8 Adjust the width of the columns by dragging the borders at the right of the column headings so that the data is displayed neatly, then click on NEXT.



9 In the AVAILABLE FIELDS section leave CUSTOMER ID selected. This is the value that will be 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.

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