



How to Modify the Check Layout

StockTrack automatically installs a check layout that is designed to fit the **Deluxe Business Forms** multi-purpose LaserJet check, **Product Number 81013**. This check layout is set up to fit in **standard #10 single window commercial envelopes** if you mail the bottom skirt with the check, or **Deluxe Product Number 91500 or 91508** if you mail the smaller top skirt with the check.

If you use these checks, you will not need to modify the check definition. If you want to use a different check layout or add a signature, follow the directions below.

You will need to have either Administrator rights or rights to Maintain | Define Check.

The check layout (used for Cash Dividends and Cash in Lieu of fractional shares) can be customized.

Select Maintain from the menu bar. Click on **Define Check**.

This window provides three choices for defining a check layout.

- I.** The First choice, **“Modify Check defined for this company”** allows you to take the existing check definition and move the “fields” or add signatures.
- II.** The Second choice, **“Start with default StockTrack template”** allows you to define a completely new template for this company. StockTrack will select the original Default Template that came with the system initially when it was installed. It allows you to start fresh, prior to any changes and modifications that may have been made to the company's current check form.
- III.** The Third choice, **“Restore previous version of Check”** allows you to revert to the version of the check prior to making your last set of changes. Each time you press the **“Continue”** button for the first two Check Definition choices, StockTrack backs-up the current version of the check you are modifying. Press the **“Alignment Test”** button to view and evaluate your changes. If you choose to “Undo” your last set of saved modifications, you may select this option to restore the last back-up version. After selecting the **“Restore previous version of Check”** option, **press the “CONTINUE” button for the restore to take effect.**

NOTE: The Restore Feature will “Undo” the last set of changes made prior to saving. Be sure to **View** your modifications with the **“Alignment Test”** button each time to check your changes. Once you press **Continue** when Modifying, StockTrack will overwrite your last backed-up copy with the current version of the check form.

TO MODIFY A CHECK:

- 1) Select one of the first two options:
 - a) **Modify Check defined for this company** (allows you to change the current check layout), or
 - b) **Start with default StockTrack template** (allows you to start with the StockTrack default layout, rather than make changes to the check layout you are currently using.)

- 2) Click on the **“Continue”** button. The Report Designer check definition window will appear. At this time, StockTrack makes a back-up of the currently saved version of the check form.
- 3) Using the mouse, drag the fields around to place them where they should appear on the check. (You may also click on the fields and move them with the arrow keys on your keyboard.)
- 4) Use the Report Controls tool bar to add additional text, lines, shapes, and even picture files to your check. Click on the appropriate control and then click on the area of the check that you want it to appear.
- 5) Select Edit/Undo to undo your last change.

6) **TO SAVE CHANGES:**

In the **Report Designer Window** (not the main StockTrack window), **Click on either of the two corner icons:**

- a) Click the **“X” box in the right corner** of the Report Designer window title bar, or
- b) Click the **left icon** (a Book) next to the words “Report Designer” and then Select **“Close”** from the menu.

You will be asked if you want to save your changes.

- c) Click **“Yes”** if you want to save your changes.

While Modifying, you may also hit **Esc** to get back to the Define Check Format Window. **Esc** may also be pressed to abandon the operation **Without Saving** any further changes.

- 7) Press the **“Alignment Test”** button to see how the check will look.

Clicking on the page will reduce the size of the image so that you can view the entire check in the window. Click the page again to return to original size view. (Or Click the Zoom% drop-down list box in the Print Preview Toolbar to adjust the percent size of your view.)

- 8) You may **Print the Check** by clicking on the **Printer Icon** in the Print Preview toolbar.
- 9) If you need to “undo” the current modifications, select **“Restore previous version of Check”** and click **“CONTINUE”**. StockTrack will restore the last backed-up copy prior to saving.

PRINT SIGNATURE ON CHECK

1) **Create a Signature File as follows:**

- a) Scan a signature into a file.
- b) Crop the signature area to 2.5 inches wide by .75 inches high.
- c) Save the file in BMP format with the name CKFILE.BMP
- d) Copy the signature file CKFILE.BMP into the directory of the company that is to use this signature on checks. The Company Directory folders are located in the main directory folder from which you are running StockTrack. (e.g., st_SAMP is the sample company.)

2) **Test Signature Alignment on Check:**

- a) In StockTrack select the “Define Check” option from the Maintain menu.
- b) Click “Alignment Test” to view and/or print an alignment sample of the current check.
- c) If the signature is not in the correct spot, select “Modify check defined for this company” on the same screen.
- d) Press Continue and move the signature object as appropriate. (The signature object is the gray box on the check form with lines drawn from corner to corner forming an "X".) Try another Alignment Test.

3) **Instructions for Defining a New Check:**

- a) In StockTrack, select the “Define Check” option from the Maintain menu.
- b) Pick “Start with default StockTrack template”.
- c) Press Continue and move objects as appropriate.
- d) Use the Alignment Test to check the positions and “Modify check defined for this company” to adjust the layout.

4) **To Remove the signatures from checks:** Remove the **CKFILE.BMP** from the company directory.