Modules\Custom Office\Main\Customizer Selection

Sage 100 TRP		
	rts Setup Utilites	
🖂 🕅 🐻 🖗 🖉 🖉 🍪 🕥 " 🖾 Dara Droj	ry 💽 Sales Order Entry	
COIR 2 7	2	
Address C: Sape 2017 MAS90's Aurober 'httmlyvelcome httml	21	e (*
		2017
Tasks My Tasks	Tasks Web Content	
	Custow Office - Man	
Constant State C	③ Que ne ni mi	
BC Distribution and Service Corp. (ABC)	Ubrary Master	530 39,21/2013

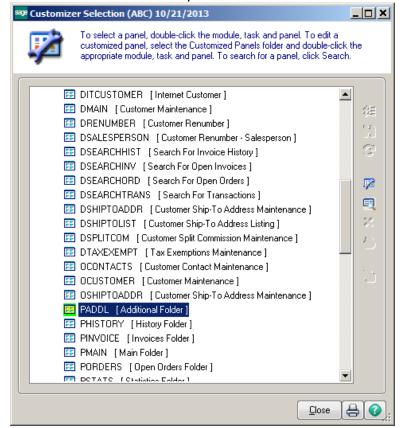
Select the module.

^{sage} Customizer Selection (ABC) 10/22/2013	
To select a panel, double-click the module, task and panel. T customized panel, select the Customized Panels folder and do appropriate module, task and panel. To search for a panel, cl	ouble-click the
Accounts Payable Accounts Receivable Bar Code	
Bill of Materials Bank Reconciliation	e e e e e e e e e e e e e e e e e e e
Business Insights Fixed Assets	모
General Ledger Inventory Management Business Manager	82
Job Cost Material Requirements Planning Paperless Office	
Purchase Order	
Return Merchandise Authorization Sales Order TimeCard	
Work Order	
	<u>C</u> lose 🖨 🕢

Select the Menu item.

See Customizer Selection (ABC) 10/21/2013	- II X
To select a panel, double-click the module, task and panel. To edit a customized panel, select the Customized Panels folder and double-click the appropriate module, task and panel. To search for a panel, click Search.	ne
 Accounts Payable Accounts Receivables Options Bill To Customer Maintenance Cash Receipts Entry Change Accounts Commission Edit Maintenance Credit Card Customer Maintenance Credit Card Division Maintenance Finance Charge Entry Invoice Data Entry Invoice History Inquiry Payment Type Maintenance Price Level by Customer Maintenance Repetitive Invoice Entry 	
 Bar Code Bill of Materials Bark Beconstitution 	
	•

Double click on the Screen you would like to edit.



Select the User or All Users, Company or All Companies.

🔓 Customizer P	anel Selectio	n				? X
Ta	isk Custa	unts Receivable omer Maintenand DL [Additional	ce .			
© Create a No Customized	599		d (Sue) 3C (ABC Distribu	tion and Service Co	orp.)	All
○ Modify an A Customized		User [All]	Company [All]	Last Edit Date 2013/Oct/21 Mor	n 9:07am	ا ک ۲ %
					<u>o</u> k <u>c</u>	ancel 🕜

The screen will display along with the Custom Office Tool bar.

		/*						
ss C:\Sage 2013\MAS90\Launcher\html								
	Tasks We	Content						
My Tasks	Custom Of							
Sage 100 ERP	Up one							
🔊 Information Contra		er Selection						
Resources	🕶 Customizer 🛛 🗶 🛄	fined Field and Table Maintenance						
Feature Tours		Se Customize: AR_CUSTOMER.M4L - PA	NDDL [Additional Folder]	×				
Business Insights Dashboard	- User/Company -		Printing					
🖻 🧰 Modules	All Users]				
🗄 🛅 Library Master	All Companies	Comment	Sort					
主 🧰 Common Information		Open Item Customer	net Enabled Customer Type					
🗈 🧰 Business Insights	Add an Item	Customer Status	Statement Cycle					
Usual Process Flows		Inactive Reason	Print Dun Message					
Paperless Office								
🗄 🛅 General Ledger	A 🗅	Data Entry	Batch Fax					
Accounts Receivable Gustomer Relationship Manageme		Price Level	Primary Credit Card Inform					
Customer Relationship Manageme Accounts Payable	- Group/Undo	Dflt Pymt Type	Card ID	Q				
Accounts Payable Payroll		Discount Bate	Payment Type					
E Inventory Management			Cardholder Name					
E G Sales Order	- Tools	Fin Charge Rate						
+ Purchase Order		[Item Code]	🔍 🛛 Last Four Digits					
E Return Merchandise Authorization	🗟 🔊 🗟		Expiration Date	Credit Cards				
	🔍 🗰 📝	Default Cost Code						
🗄 🛅 Bill of Materials			Relate to Sage CRM					
🗉 🛅 Work Order		Default Cost Type	Sage CRM Company					
Bank Reconciliation		Add Button (87,8) [1x1]						
Electronic Reporting								
🕀 🧰 Bar Code	<u> </u>							
TimeCard TimeCard Material Requirements Planning								
Material Requirements Planning Visual Integrator								
E Fixed Assets								
eBusiness Manager								
Custom Office								
🚊 🧰 Main								
Customizer Selection								
User-Defined Script Mainten	nance							
Reports								
🗄 🧰 Utilities								
UDT Maintenance								

Select the field you would like to edit by Double clicking or Right clicking the field.

^{age} Text Definition	1			? ×
<u>1</u> . Main	<u>2</u> . Options			
Text Sort Font [Def Size Full- Text Color Background	-	▼ A ▼ 63 ▼ 63	Attributes Bold Bow Voi Vialice Underline Ustification	rd-
Preview		Sort		
			<u>D</u> K <u>Cancel</u> Dela	ete 🕜

You can edit the field name, font and font size, text color and background color.

<u>1</u> . Main	<u>2</u> . Options]		
Text Territ Font [Defa Size Full-S Text Color Background Preview	ault]	 ▲ A ▲ 66 ▲ 66 ▲ 66 		
		Territc		
			<u> </u>	lete 🛛

You may need to increase the Width of the field. Click on the Options tab to increase the width. Click OK when done editing the field.

⁸⁹⁹ Text Definition		? X
<u>1</u> . Main <u>2</u> . Options]	
Position & Size Column 49 × Bow 1.75 × Width 8 × Height 1.00 ×	Properties	
A <u>u</u> to-Size Preview	Territory	
	<u><u>D</u>K<u>Cancel</u>elete</u>	0

Click the Save button on the Tools panel to save the changes to the screen.



The changes will now appear on the panel. Note: Once a panel has been customized an * will appear in the upper left hand corner.

^{sage *} Customer Maintenance (ABC) 10/21/2013	
Customer No. 01-ABF 2. [1] 14 4 Name American Business Futures	Copy From Renumber More 🔹
<u>1</u> . Main <u>2</u> . Additional <u>3</u> . Statistics <u>4</u> . Summary	<u>5</u> . History <u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . S/Os
Comment Call Ed for credit approval.	Printing Territory AMER
Open Item Customer Internet Enabled Customer Status Active Inactive Reason Internet Enabled	Customer Type A2 Statement Cycle M Print Dun Message
Data Entry Price Level 1	Primary Credit Card Information
Dflt Pymt Type NONE Discount Rate .000 %	Card ID Second S
Fin Charge Rate 1.500% Item Code WIDGET	Cardholder Name Last Four Digits Expiration Date Credit Cards
8" x 10" Widgets	
	Accept Cancel Delete 😝 📀

How to Customize the Columns on a Screen

tomerNo.	01-ABF American Busines	ss Futures	<u>] -, [</u> 4 4 	d di 🧰				Copy From	Renum <u>b</u> er	
<u>1</u> . Main	2. Additiona	al <u>3</u> . Statis	tics <u>4</u> . Sum	mary <u>5</u> . His	story <u>6. Invo</u>	ices <u>7</u> . Tra	ansactions	<u>8</u> . S/Os	K	
nvoice No. 000191 100041 100048 000169 100012 10009 100042 100093 100034 100035	Invoice Type Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Credit Memo	5/31/2010 5/31/2010 5/30/2010 5/29/2010 5/28/2010 5/28/2010 5/23/2010 5/15/2010 5/15/2010 5/15/2010 5/10/2010	Inv Due Date 6/30/2010 6/30/2010 6/30/2010 6/29/2010 6/27/2010 6/27/2010 6/27/2010 6/20/2010 6/20/2010 6/20/2010 6/20/2010 6/20/2010 6/20/2010 6/14/2010	Disc Date	Amount 2,416.25 38.20 130.00 2,416.25 265.86 666.53 2,032.54 864.25 1,113.05 2,467.61 81.48-	Discount 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	2,467.61 <mark>81.48</mark>	789 789 ≫<890200 AJ-890123 - 3456	Comment Monthly supply on Monthly supply on RUSH RUSH Ship same day.	
000190	Invoice	4/30/2010	5/30/2010 unt Pay Date	Check No.	85.00 Payment Ref	0.00	85.00			
	lance 12.36	Current 0.00	30 Days 0.00	60 Days 0.00	90 Days 0.00	120 D 5,732.				\$

Right click on screen, choose Panel Settings, Customizer. Chose User or Company to do the customization for or modify an existing panel.

⁸⁰⁹ Customizer Panel Sele	ction			<u>?</u> ×
1 Task	Accounts Receir Customer Mainte Customer Mainte	nance		
Create a New Customized Panel	<u>U</u> ser <u>C</u> ompany	sid (Sue) ABC (ABC Distri	bution and Service Corp.)	_ AI _ AI
Modify an Already Customized Panel	User [All]	[All]	Last Edit Date 2013/Oct/21 Mon 9:21am	
				Cancel 🕡

The Panel and Customizer Tool bar will display.

	<u>V</u> iew <u>H</u> elp	Main Reports	Period End Setur	Utilities Custom R	eports Explore Cu	ustom Process Flows	S	
Panel Edit Help	I View Help S 🖏 🐼 »]							
User/Company	See Customize: AR						×	
All Users	NS9 🚽							
All Companies								
Add an Item								
	EII .							
A	ent							
	6						<u> </u>	
Group/Undo	ihts							
	aste							
- Tools	infc							
🗟 🖓 🕵	insi ces							
	Of							
	edg Rei							
	usti							
	usti Add Button (0,0) Invoice nistory inquiry	[1x1]				SJD ABC	10/21/2013	
	Repetitive Invoice Entry							
	Repetitive Invoice Selection Invoice Data Entry							
	Invoice Printing							
	Sales Journal Cash Receipts Entry							
	Cash Receipts Entry Cash Deceipts Journal							

Right click on the panel. The List Box Definition box will display.

List Box Definitior	ILB_OPEN_	INVOICES]			?
<u>1</u> . Main	<u>2</u> . For	mat)	<u>3</u> . Options]	
Initial List (Progr	am-Defined]		Default Value Hot Key		•
Status Message ToolTip					
Help Code	#700		Dufidth	and Height No	t to Scale)
	плоісе Туре	Inv Date	Inv Due Date	Disc Date	Sold To
				Connect	
			<u> </u>	<u>C</u> ancel	Delete 🕜

Click on Format Tab.

EN_INVOICES	5]			<u>?</u> ×					
. Format	<u>3</u> . Optior	ns)							
- List Box Format									
Width	Position	Hide							
11.00	Left 🔹								
12.00	Left 🔹		Add						
10.00	Left 🔹								
12.00	Left 🔹								
10.00	Left 🔹		<u>R</u> eset						
12.00	Left 🔹		-						
Preview [Width and Height Not to Scale]									
e Inv Date	Inv Due [Date Disc	Date Sold T	0					
			i cel <u>D</u> elete	0					
	Format Width 11.00 12.00 10.00 12.00 10.00 12.00	Format <u>3. Option</u> Width Position 11.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • 12.00 Left •	Format <u>3</u> . Options Width Position Hide 11.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • 12.00 Left • (Width and H re Inv Date Inv Due Date Disc	Format 3. Options Width Position Hide 11.00 Left 12.00 Left 12.00 Left 12.00 Left 12.00 Left 12.00 Left I2.00 Left Width and Height Not to Scal I2.00 Left I2.00 Left Width and Height Not to Scal					

Select the fields you would like to hide. You can rearrange the fields by choosing the up or down arrows. Click Ok when done.

Note: Click the Add button to select additional fields that you would like to display. If you have added User Defined Fields (UDF's) they will be listed here.

Column Title		Width	Position	n	Hide			
Sold To		12.00	Left	•				
Amount		12.00	Right	-			Add	
Discount		12.00	Right	•	4		▲ 🔻	
Balance		12.00	Right	-				
Customer PO	No.	15.00	Left	-			<u>R</u> eset	
Comment		15.00	Left	-	⊻	.		
Preview [Width and Height Not to Scale]								
Invoice No.	Invoice Type	Inv Date	Inv D	ue Date	e Disc E)ate	Sold T	

Click on Options Tab to see additional features for the field. You can hide fields or disable them from users entering data into that particular field.

1. Main 2. Format 3. Options Position & Size Properties Column 2 * Bow 1.20 * Width 86 * Height 11.25 * Preview Width and Height Not to Scale	Position & Size Properties Column 2 ★ Bow 1.20 ★ Width 86 ★ Height 11.25 ★ Fixed Font	List Box Defini	tion [LB_OPEN_	INVOICES]			?
Column 2 Bow 1.20 Width 86 Height 11.25 Fixed Font	Column 2 * Bow 1.20 * Width 86 * Height 11.25 * Preview [Width and Height Not to Scale]	<u>1</u> . Main	<u>2</u> . For	mat	<u>3</u> . Options)	
Preview [Width and Height Not to Scale]							
	Invoice No. Invoice Type Inv Date Inv Due Date Disc Date Sold To	Preview			[Width	and Height No	ot to Scale]
Invoice No. Invoice Type Inv Date Inv Due Date Disc Date Sold To		Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Sold To

Click the Save button on the Customizer Tool bar when done.

Saye 100 LKr																	
😔 Customizer 🗙	īL⊻	iew	<u>H</u> elp		Ma	in <u>R</u> epo	rts	Period End	<u>S</u> etup	<u>U</u> tilities	Custom Reports	Explore	Custo	om Proce	ess Flows		
Panel Edit Help	6	$\langle \rangle$	1	?		ltem Inqu	iiry	📃 Sales C	order En	try							
User/Company		sage	Custom	ize: /	AR_CUS	TOMER	.M4	L - PINVOI	E [Inv	voices Fo	older]						×
All Users All Companies	AS9	Γ															<u> </u>
																- IP	91
Add an Item																	╡╟═╴
																F	
A	ent																31
	5															E	
Group/Undo	hts																
	aste																
- Tools	Info																
	ces																
E # 🗭	Of																
	Re															2	9
	Ι.	L															
	ust ust	_	AME 1-	Frame	e (0 , 0)[94×2	21							SJD	ABC	10/21/20	013
	Invoi	ce ni	story inc	ury			T										
			Invoice Invoice				L										
I III III III III III III III III III	Invoi	ce Da	ata Entry														
i I I I	Invoi	re Dr	inting														

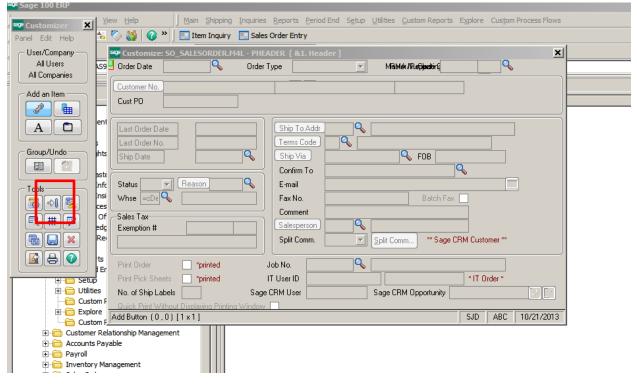
The fields will no longer appear.

* Customer M	1aintenance (A	BC) 10/21/2	013							
ustomer No. 01	1-ABF] R. 🖸 🚺 🗸	🕨 🌬 🛗 👘				Copy From	m Renum <u>b</u> er	More
ame Ar	merican Business	Futures								
<u>1</u> . Main	2. Additional	<u>3</u> . Statis	tics <u>4</u> . Sur	nmary <u>5</u> . F	listory	iices <u>7</u> .	Transactions	<u>8</u> . S/Os	1	
Invoice No.	Invoice Type	Inv Date ⊽	Inv Due Date	Disc Date	Amount	Balance	Customer PO N	o. Terms	Sispran	▲
0000191	Invoice	5/31/2010	6/30/2010	,,	2,416.25	0.00		01	0100	- 10
0100041	Invoice	5/31/2010	6/30/2010		38.20	38.20	789	01	0100	
0100048	Invoice	5/30/2010	6/29/2010		130.00	130.00		01	0100	
0000169	Invoice	5/29/2010	6/28/2010		2,416.25	0.00		01	0100	
0100011	Invoice	5/28/2010	6/27/2010		265.86	0.00		01	0100	- E
0100012	Invoice	5/28/2010	6/27/2010		666.53	0.00		01	0100	
0100009	Invoice	5/23/2010	6/22/2010		2,032.54	0.00		01	0100	
0100042	Invoice	5/21/2010	6/20/2010		864.25	0.00		01	0100	
0100033	Invoice	5/15/2010	6/14/2010		1,113.05	613.05	XX-890200	01	0100	
0100034	Invoice	5/15/2010	6/14/2010		2,467.61		AJ-890123	01	0100	
0100055	Credit Merno	5/10/2010			81.48-	81.48-	3456	01	0100	
0000190	Invoice	4/30/2010	5/30/2010		85.00	85.00		01	0100	
APR0001	Finance Charge	4/30/2010	4/30/2010		43.89	43.89				-
Trans Date	Trans Type	Trans Amo	unt PayDate	Check No.	Payment Ref	Cr Card	RMA No.			
Bala	ince	Current	30 Days	60 Days	90 Days	120) Days			 ¥
5,732	2.36	0.00	0.00	0.00	0.00	5,7	32.36			
<u>></u>								Accept	<u>Cancel</u> Delete	-80

How to Customize Tab Stops

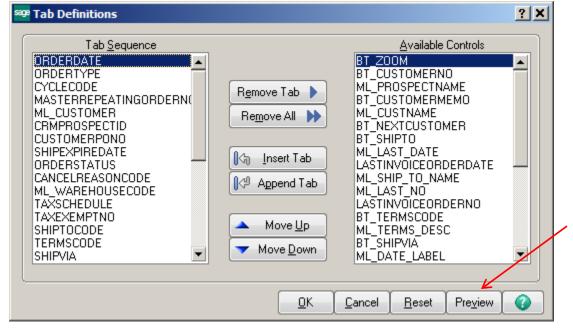
Right click on the screen, choose Panel Settings, then Customizer. Select the User or All Users, Company or All Companies OR Modify an Already Customized Panel.

s 🕿 💿 🔊 🚳 I		Sales Order Entry
1 🏠	Find Task	
2013 MAS90 Launcher	\html\welcome.html	
	🤓 Sales Order Entry (ABC) 1	10/21/2013
	Order Number	🔍 🛃 🚺 🖉 🕨 🕅 🎬 Copy from 🛛 Defaults 🔤 Customer 🤅 Credit
ERP	1. Header 2. Address	3. Lines 4. Totals 5. Credit Card User
nation Center	<u>1</u> . Header <u>2</u> . Address	3. Lines 4. Totals 5. Credit Card
irces ire Tours	Order Date	Order Type
ess Insights Dashboar		
les	Customer No.	· · · · · · · · · · · · · · · · · · ·
brary Master	Cust PO	
ommon Information		
usiness Insights		🖤 Customizer Panel Selection 🔋 🗙
sual Process Flows		Module Sales Order
aperless Office		Task Sales Order Entry
eneral Ledger	Ship Date	Panel Sales Order Entry
ccounts Receivable	L	
Main Reports	Status New 💌 Reaso	
Period End		© Create a New ∐ser sid (Sue)
Setup	Whse	Customized Panel Company ABC (ABC Distribution and Service Corp.) 🔽 🗌 All
Utilities	-Sales Tax	
Custom Reports	Schedule	
Explore		User Company Last Edit Date
Custom Process Flo		None
ustomer Relationship	Print Order	
ccounts Payable		O Modify an Already Customized Panel
ayroll	Print Pick Sheets	
iventory Management ales Order		
D Main	Quick Print Without Display	
h Shipping		
1 Inquiries	Print Order Print Pick	
Reports		
👌 Period End		
👌 Setup		
h Utilities		



Click on the Tab Definitions button on the Customizer Tool bar.

The Tab Definitions panel will appear. To see the existing Tab stop, click the Preview button.



The Preview Screen will show the Tab sequence.

🕺 * &1. Header
Order Date 🚺 🔍 Order Type 💈 💌 Makkér/Refijise 🚳 🔍
Existence file 5 Cust PO 7
Last Order Date Last Order No. Ship Date Ship Date Statu® Rease Whstill = CDE Sales Tax Exemption # Image: Split Comm. Split Comm. Split Comm.
22 Print Order *printed Job No. 23 22 Print Pick Sheets *printed IT User ID *IT Order *
No. of Ship Label 27 Sage CRM User Sage CRM Opportunity Sage CRM Opportunity

Highlight the field you would like to remove, then click the Remove Tab button. You can also edit the sequence by using the Move Up and Move Down buttons. Click OK when done, then click the Save button on the Customizer Tool Bar.

^{sage} Tab Definitions			? X
Tab Sequence ORDERDATE ORDERTYPE ORDERTYPE CYCLECODE MASTERREPEATINGORDERNI ML_CUSTOMER CRMPROSPECTID CUSTOMERPONO SHIPEXPIREDATE ORDERSTATUS CANCELREASONCODE ML_WAREHOUSECODE TAXSCHEDULE TAXEXEMPTNO SHIPTOCODE TERMSCODE SHIPVIA	Remove Tab Remove All Remove All Carl Insert Tab Carl Append Tab	<u>Available Controls</u> BT_CUSTOMERNO ML_PROSPECTNAME BT_CUSTOMERMEMO ML_CUSTNAME BT_NEXTCUSTOMER BT_SHIPTO ML_LAST_DATE LASTINVOICEORDERDATE ML_SHIP_TO_NAME ML_LAST_NO LASTINVOICEORDERNO BT_TERMSCODE ML_TERMS_DESC BT_SHIPVIA ML_DATE_LABEL	
		<u>Cancel R</u> eset Pre <u>v</u> iew	

Bonus Round!

If you would like your customizations only for a specific Group of Users, you can assign your Users to a Customization Group in User Maintenance.

^{sege} User M	aintenance (ABC) 10/21/2013				
User Log(on bob 🔍 🔍			C	opy <u>R</u> ename
First Nam	e Bob Last Na	me		UserCode BOB	3
Password	I \$\$\$\$ Confirm Passv	vord \$\$\$\$ Ci	ustomization Group SL	S Ex <mark>p</mark> ires	
<u>1</u> . Mainte	enance <u>2</u> . Preferences				
	· · ·				
	Company	Role	Start Date	Expiration Date	
1	All Companies	acct	•		👼 🕶 🔰
2	<u> </u>		•		
User 🗌	Account Locked		Acce	ept <u>C</u> ancel	Delete

When you go to Customize your panel you will now see the Group in the drop down list for Users. Any Group that you choose will have that specific customization. This is a great feature for Managers vs regular users.

^{sege} Customizer Panel Selec	tion			? X
	ales Order ales Order Entry HEADER [&1.			
 Create a New Customized Panel 	<u>U</u> ser <u>C</u> ompany	sjd (Sue) bob (Bob) sjd (Sue) Group 'SLS'		All All
○ Modify an Already Customized Panel	User [All]	[All]	Last Edit Date 2013/Oct/21 Mon 10:04am	
			<u>_</u> K	<u>C</u> ancel