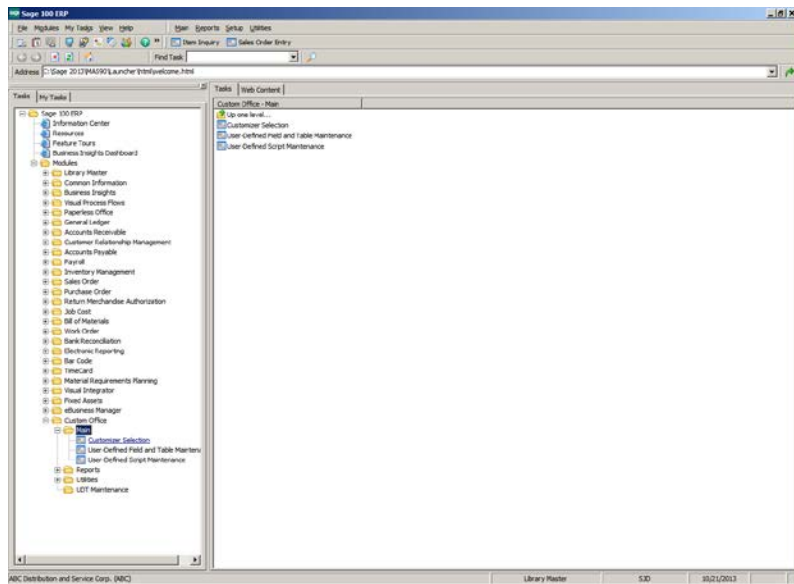
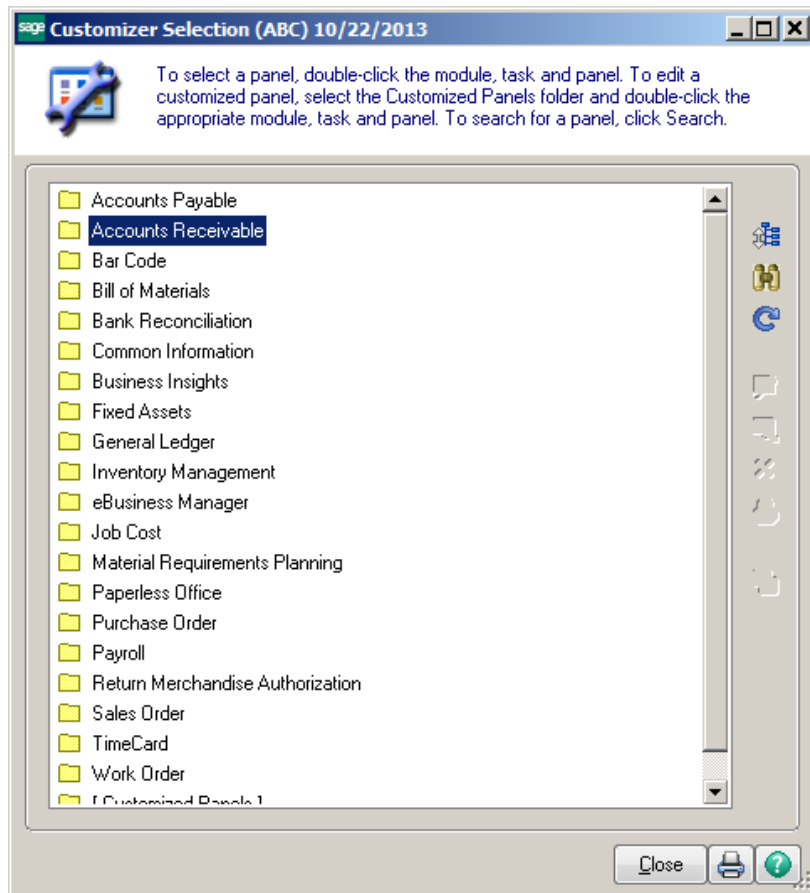


Custom Office – Customizing Your Screen

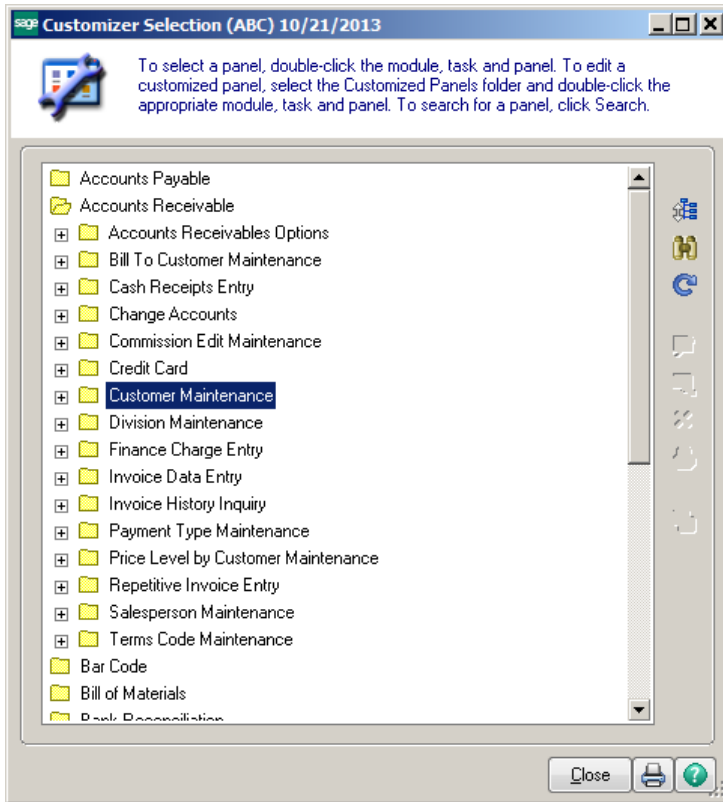
Modules\Custom Office\Main\Customizer Selection



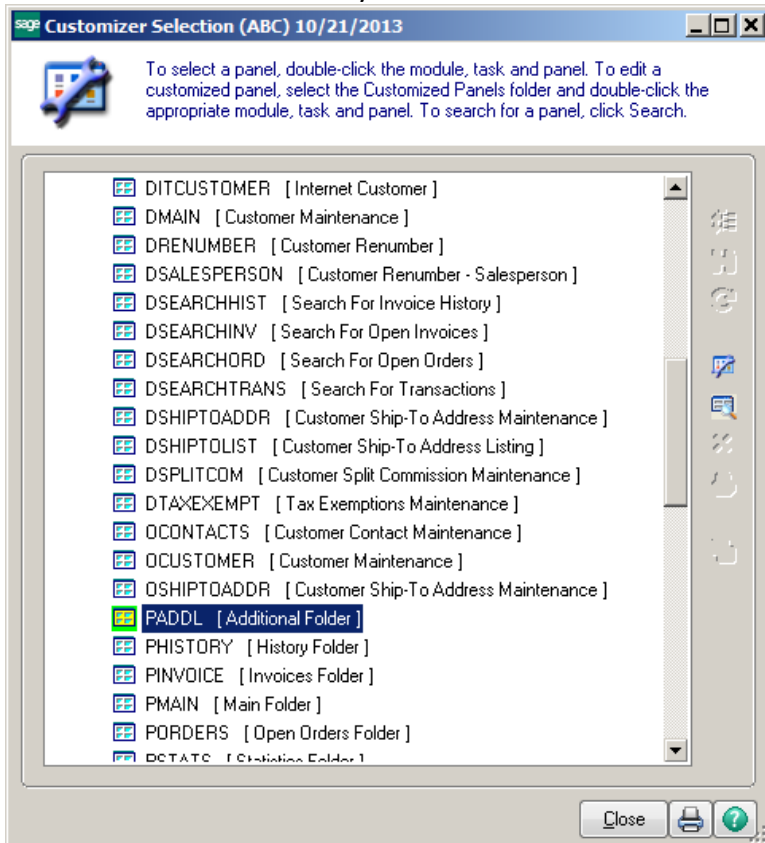
Select the module.



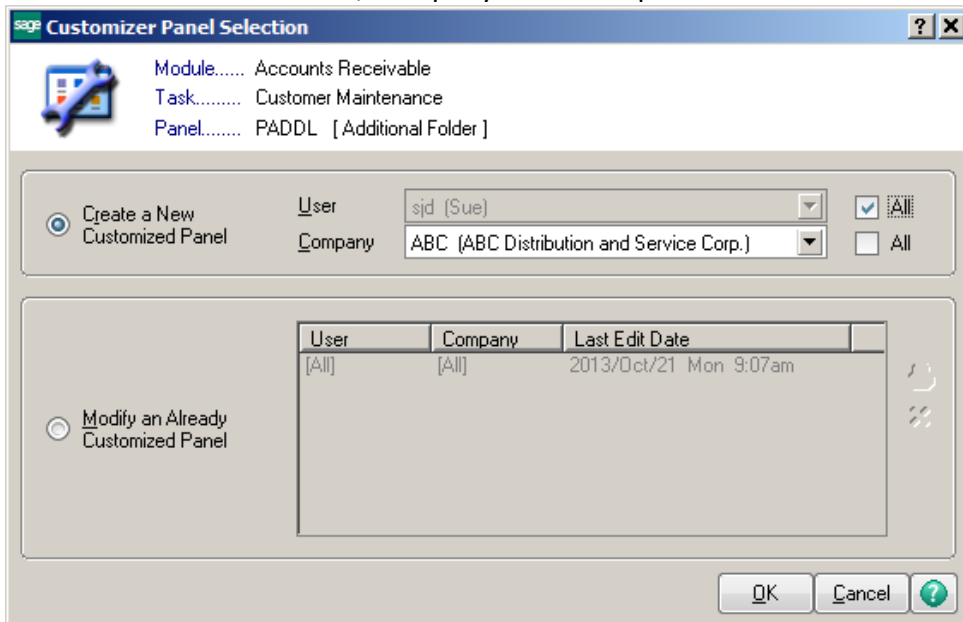
Select the Menu item.



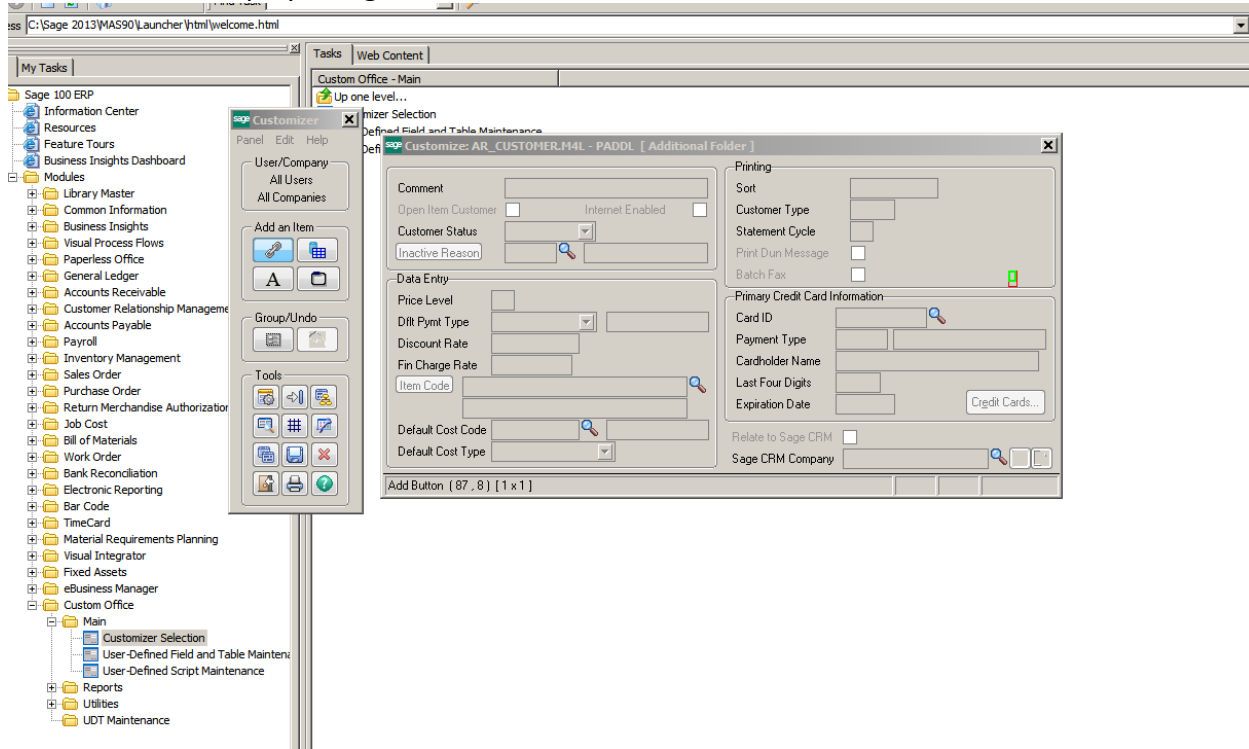
Double click on the Screen you would like to edit.



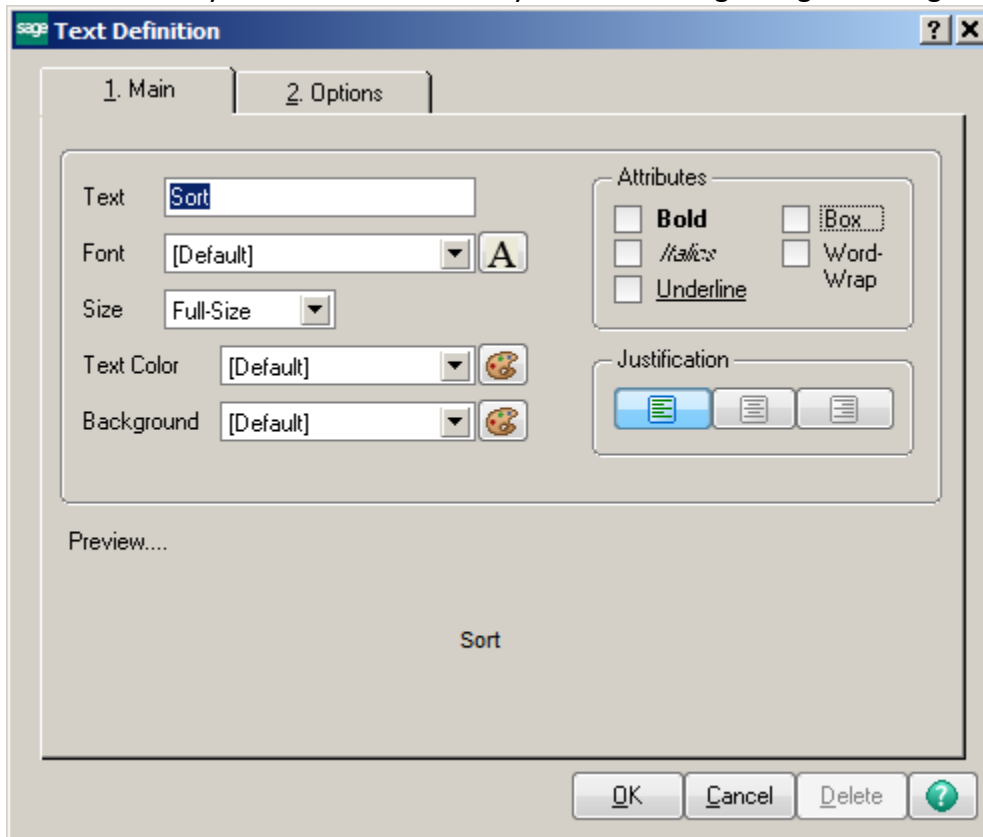
Select the User or All Users, Company or All Companies.



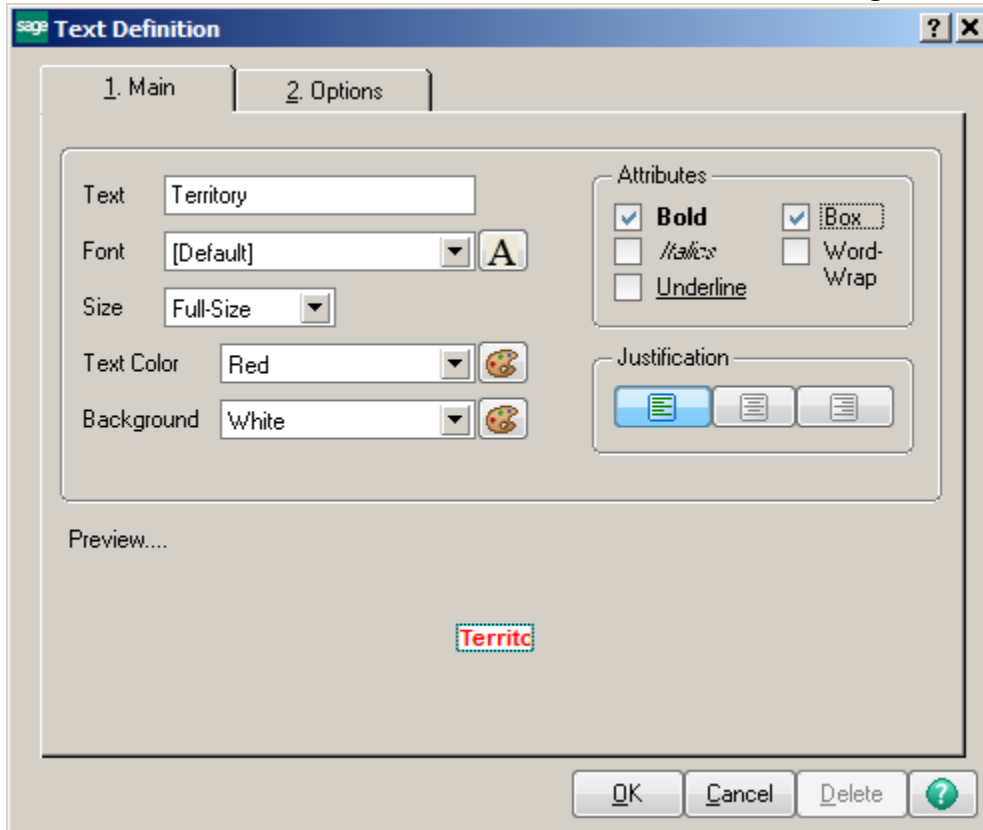
The screen will display along with the Custom Office Tool bar.



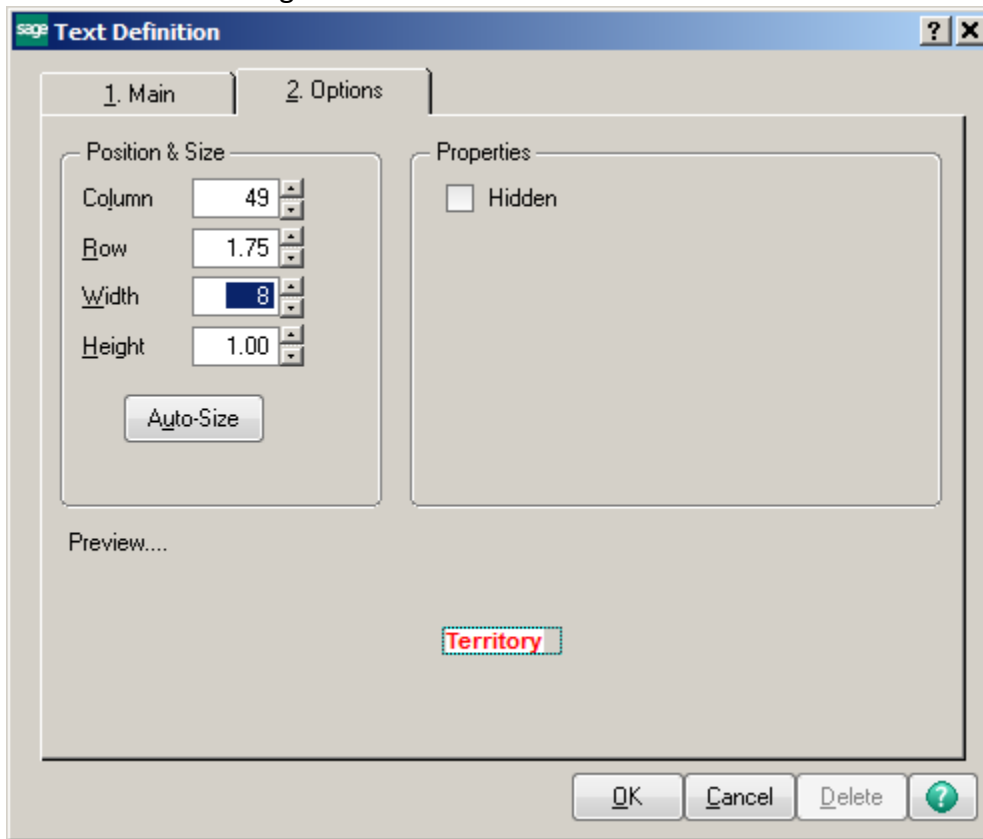
Select the field you would like to edit by Double clicking or Right clicking the field.



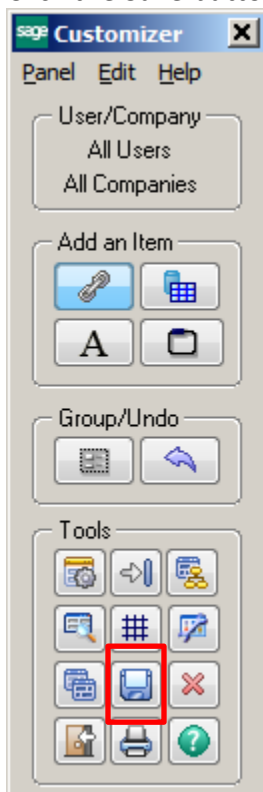
You can edit the field name, font and font size, text color and background color.



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.



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.

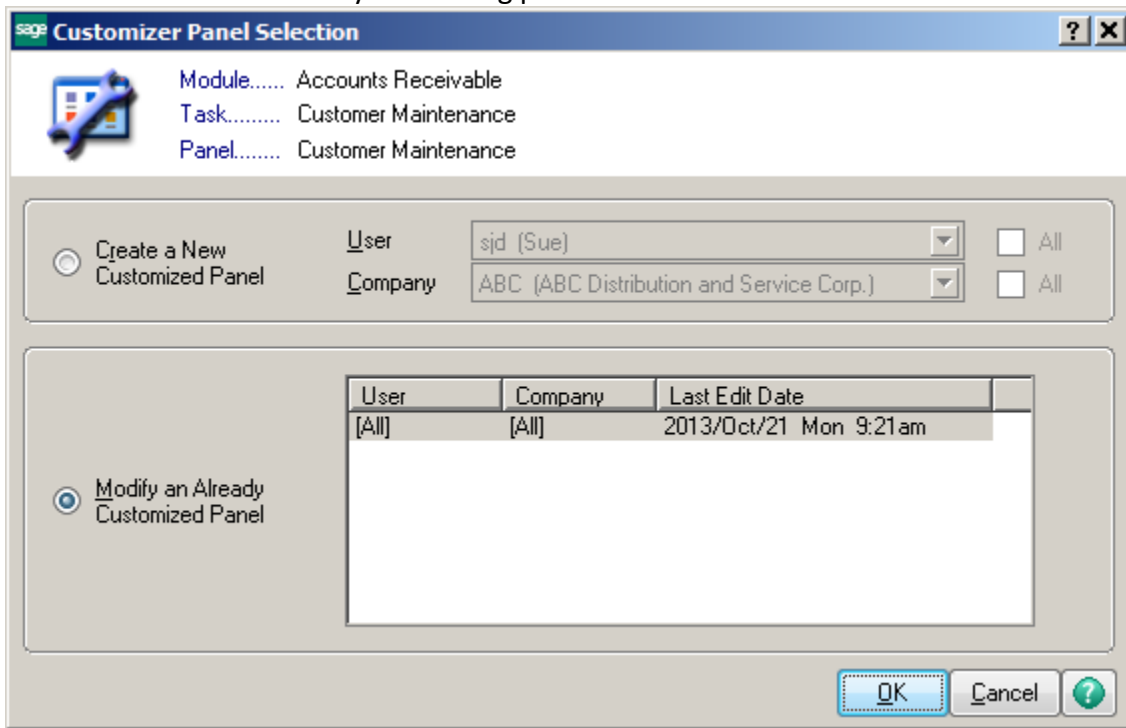
How to Customize the Columns on a Screen

Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Amount	Discount	Balance	Customer PO No.	Comment
0000191	Invoice	5/31/2010	6/30/2010		2,416.25	0.00	0.00		Monthly supply or
0100041	Invoice	5/31/2010	6/30/2010		38.20	0.00	38.20	789	
0100048	Invoice	5/30/2010	6/29/2010		130.00	0.00	130.00	789	
0000169	Invoice	5/29/2010	6/28/2010		2,416.25	0.00	0.00		Monthly supply or
0100011	Invoice	5/28/2010	6/27/2010		265.86	0.00	0.00		
0100012	Invoice	5/28/2010	6/27/2010		666.53	0.00	0.00		RUSH
0100009	Invoice	5/23/2010	6/22/2010		2,032.54	0.00	0.00		RUSH
0100042	Invoice	5/21/2010	6/20/2010		864.25	0.00	0.00		Ship same day.
0100033	Invoice	5/15/2010	6/14/2010		1,113.05	0.00	613.05	XX-890200	
0100034	Invoice	5/15/2010	6/14/2010		2,467.61	0.00	2,467.61	AJ-890123	
0100055	Credit Memo	5/10/2010			81.48	0.00	81.48	3456	
0000190	Invoice	4/30/2010	5/30/2010		85.00	0.00	85.00		

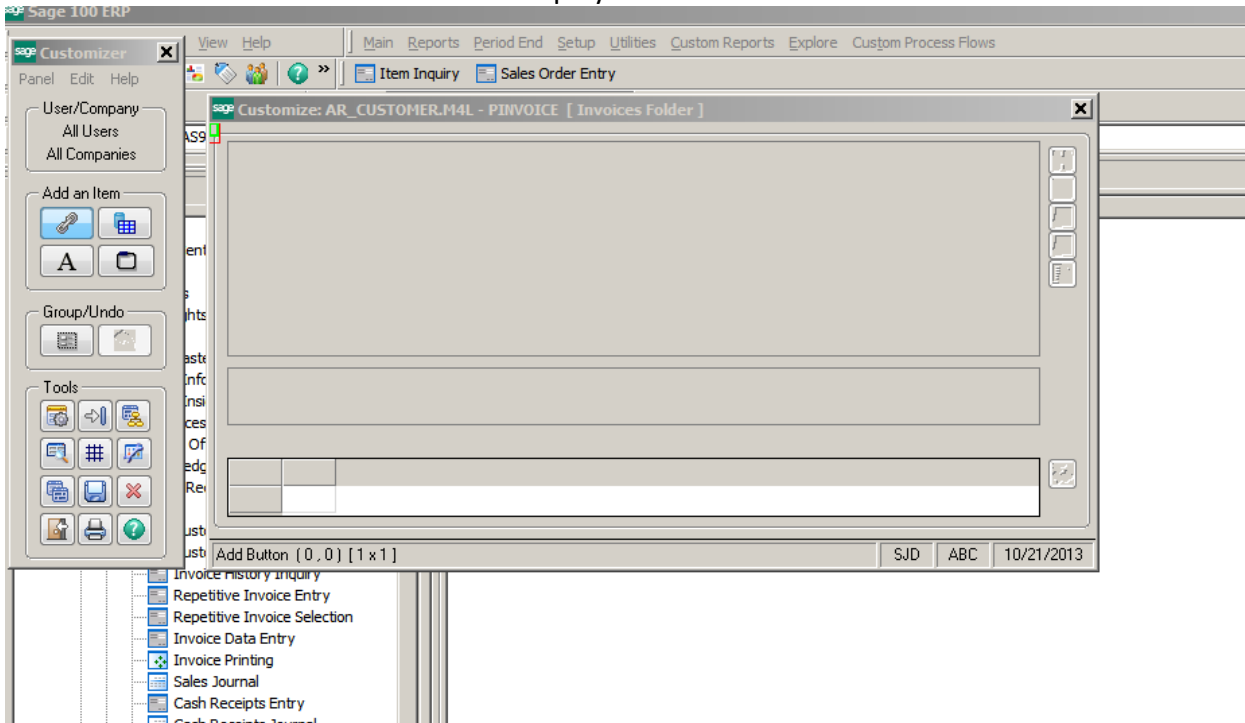
Trans Date	Trans Type	Trans Amount	Pay Date	Check No.	Payment Ref	Cr Card	RMA No.

Balance	Current	30 Days	60 Days	90 Days	120 Days
5,732.36	0.00	0.00	0.00	0.00	5,732.36

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



The Panel and Customizer Tool bar will display.



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

The screenshot shows the 'List Box Definition [LB_OPEN_INVOICES]' dialog box with the 'Main' tab selected. The 'Initial List' is set to '[Program-Defined]' and the 'Default Value' is empty. The 'Hot Key' is also empty. The 'Status Message', 'ToolTip', and 'Help Code' fields are empty, with the help code currently showing '#700'. The 'Preview...' section shows a table with columns: Invoice No., Invoice Type, Inv Date, Inv Due Date, Disc Date, and Sold To. The table is currently empty. At the bottom, there are buttons for 'OK', 'Cancel', 'Delete', and a help icon.

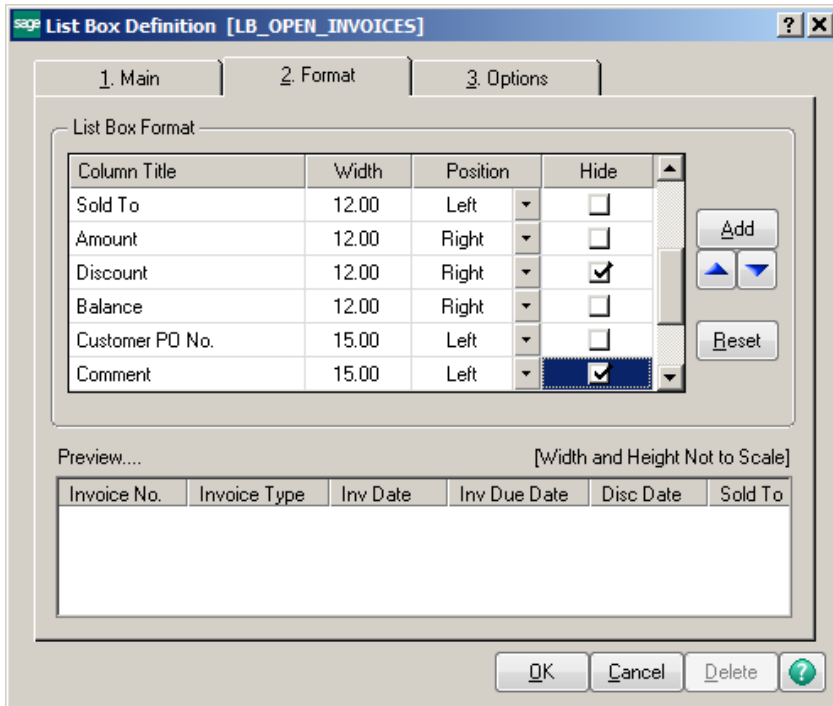
Click on Format Tab.

The screenshot shows the 'List Box Definition [LB_OPEN_INVOICES]' dialog box with the 'Format' tab selected. The 'List Box Format' section contains a table with columns: Column Title, Width, Position, and Hide. The 'Invoice No.' row is selected. To the right of the table are buttons for 'Add', 'Reset', and arrow keys. The 'Preview...' section shows the same table structure as in the Main tab, but it is empty. At the bottom, there are buttons for 'OK', 'Cancel', 'Delete', and a help icon.

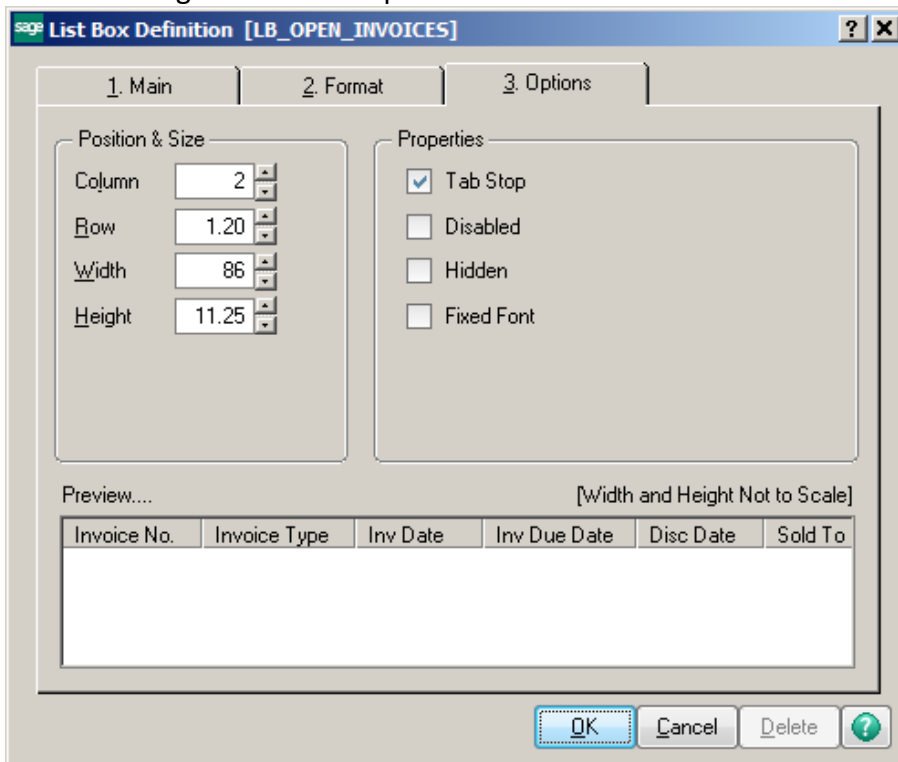
Column Title	Width	Position	Hide
Invoice No.	11.00	Left	<input type="checkbox"/>
Invoice Type	12.00	Left	<input type="checkbox"/>
Inv Date	10.00	Left	<input type="checkbox"/>
Inv Due Date	12.00	Left	<input type="checkbox"/>
Disc Date	10.00	Left	<input type="checkbox"/>
Sold To	12.00	Left	<input type="checkbox"/>

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

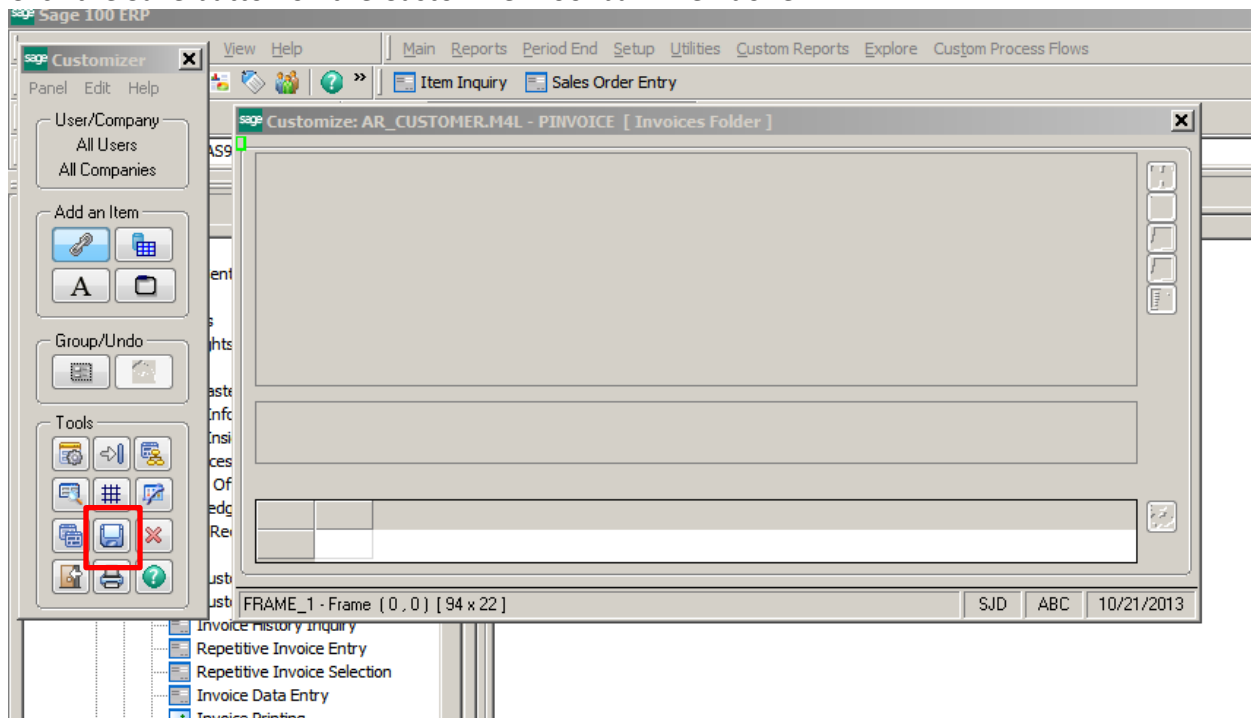
Note: Click the Add button to select additional fields that you would like to display. If you have added User Defined Fields (UDF's) they will be listed here.



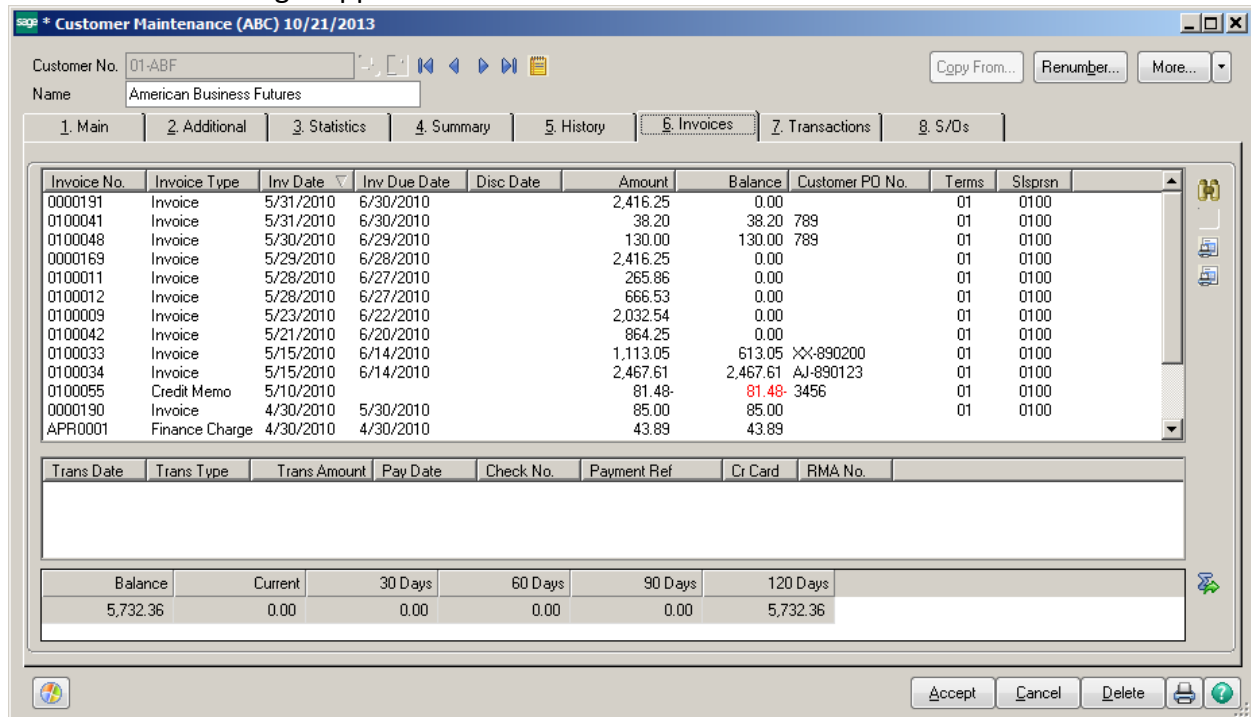
Click on Options Tab to see additional features for the field. You can hide fields or disable them from users entering data into that particular field.



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

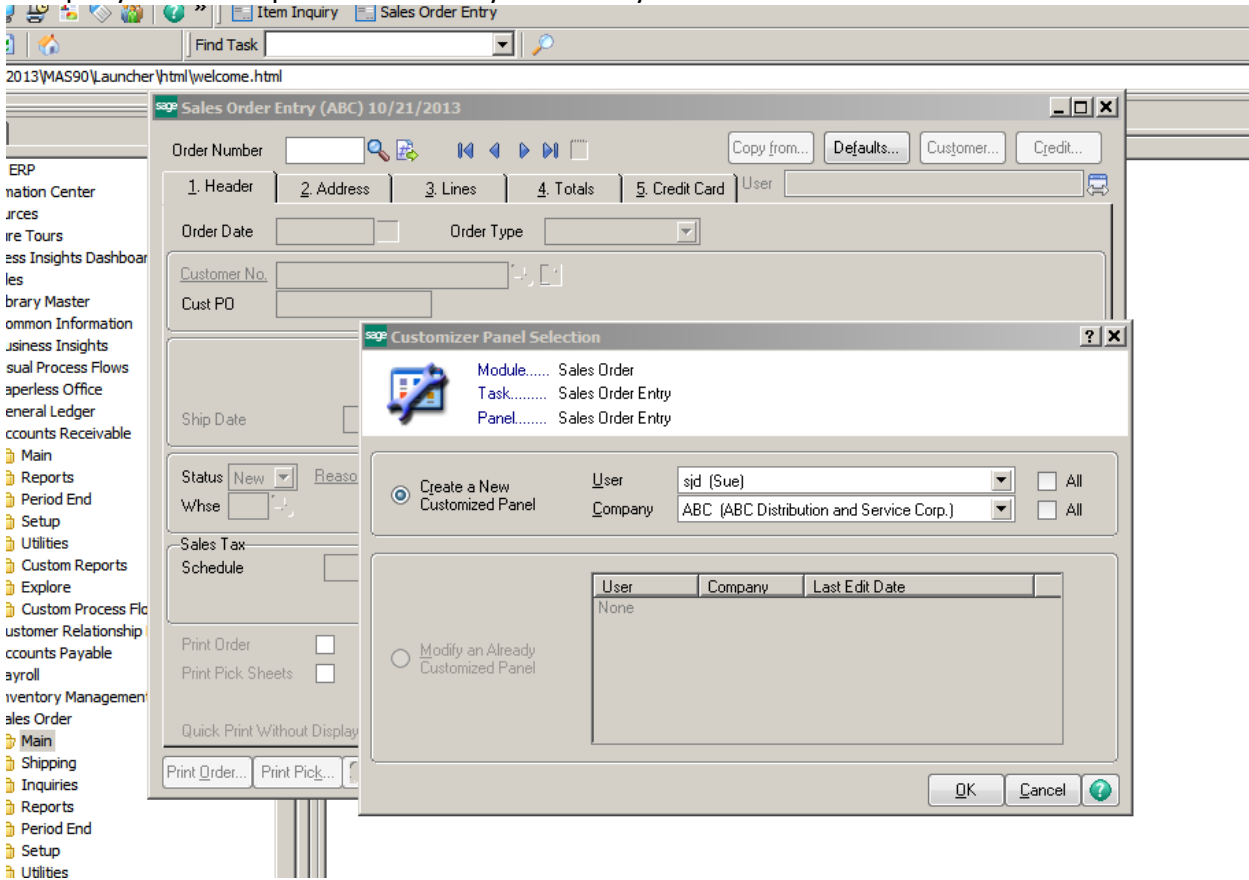


The fields will no longer appear.

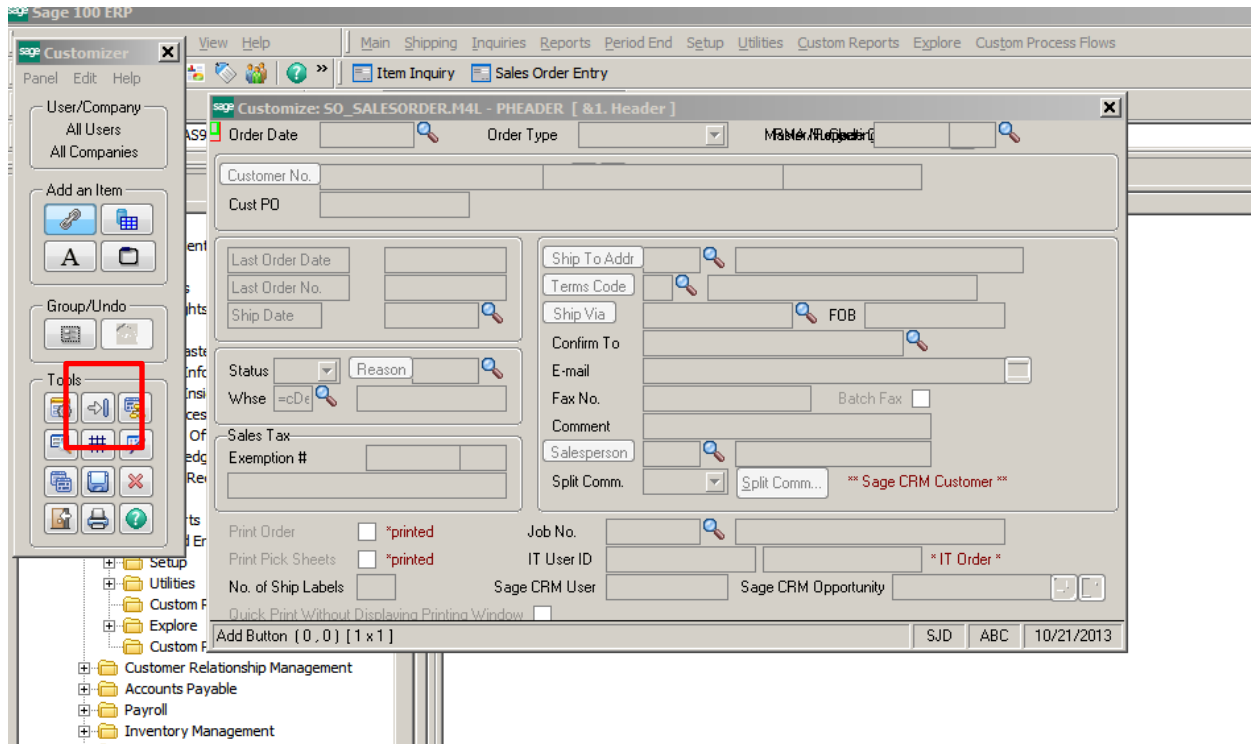


How to Customize Tab Stops

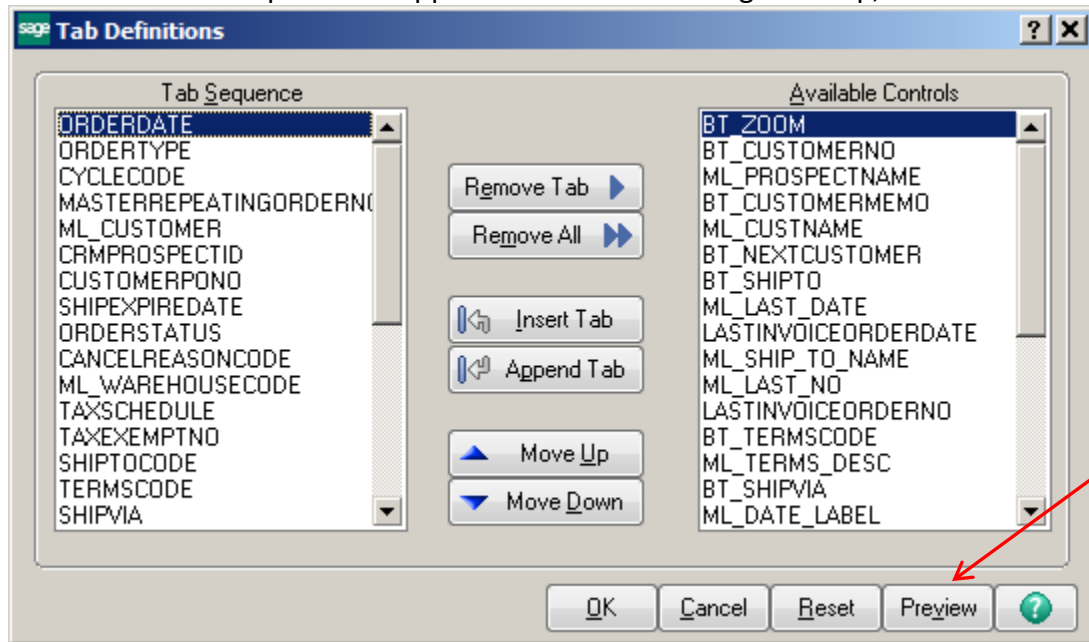
Right click on the screen, choose Panel Settings, then Customizer. Select the User or All Users, Company or All Companies OR Modify an Already Customized Panel.



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.

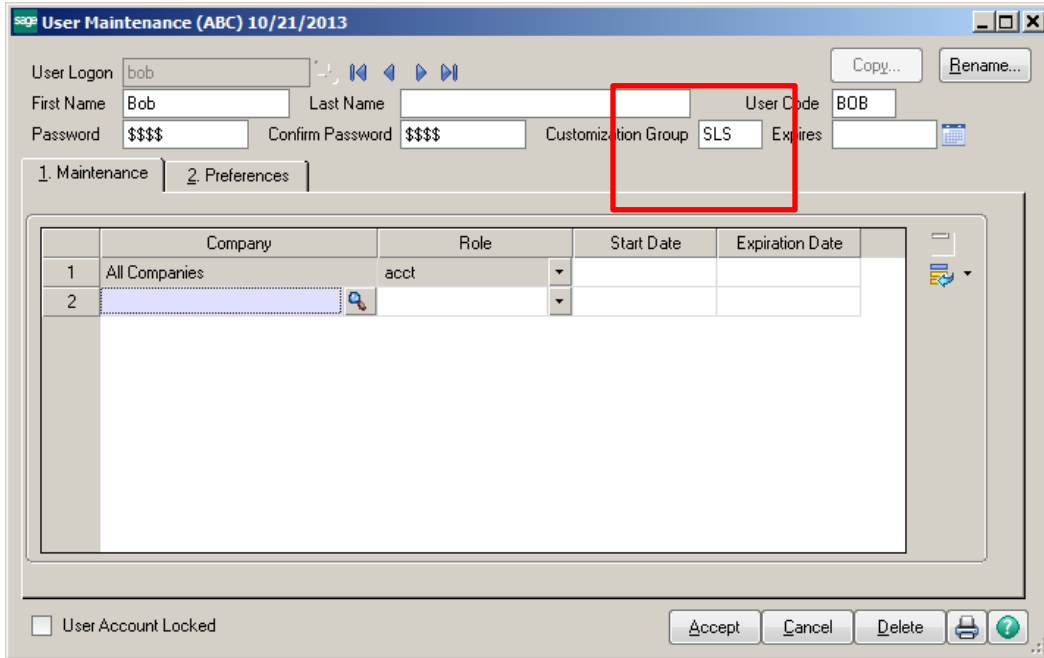


The Preview Screen will show the Tab sequence.

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.

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.



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.

