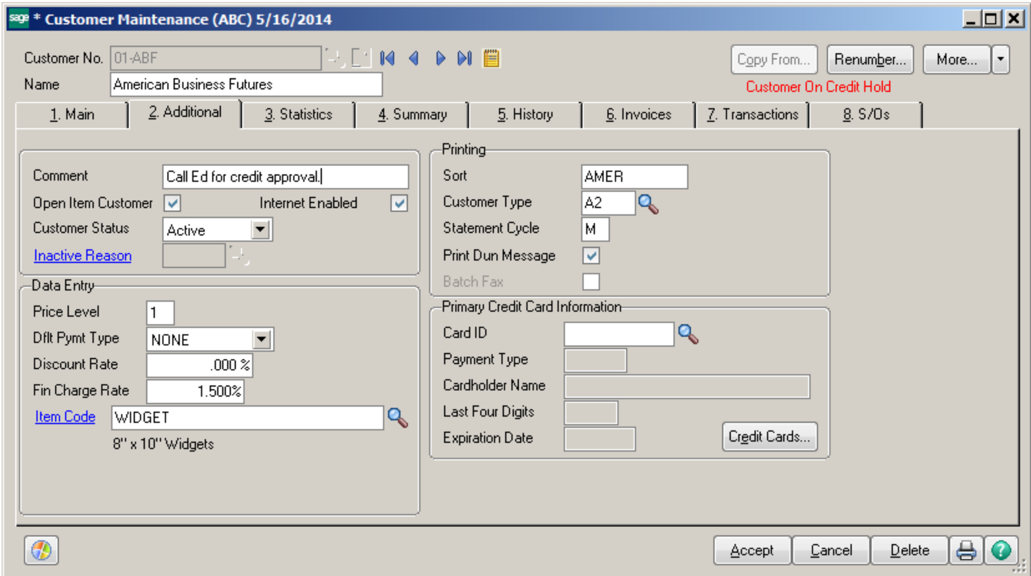
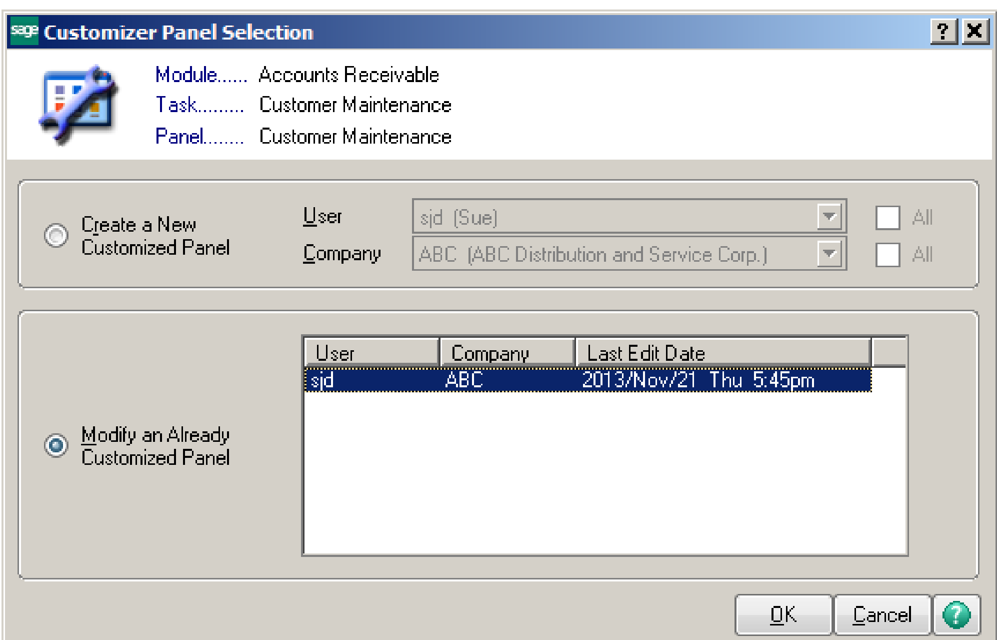
How to Modify Your Screen Using Custom Office

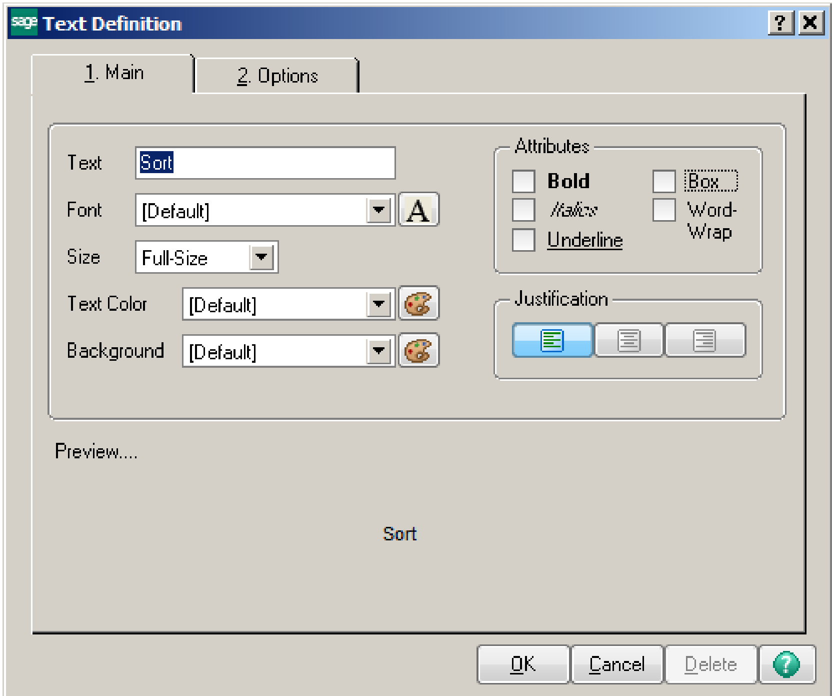
Open Screen to edit. Right click in gray area of screen; choose Panel Settings from the pop-up. Then click Customizer.

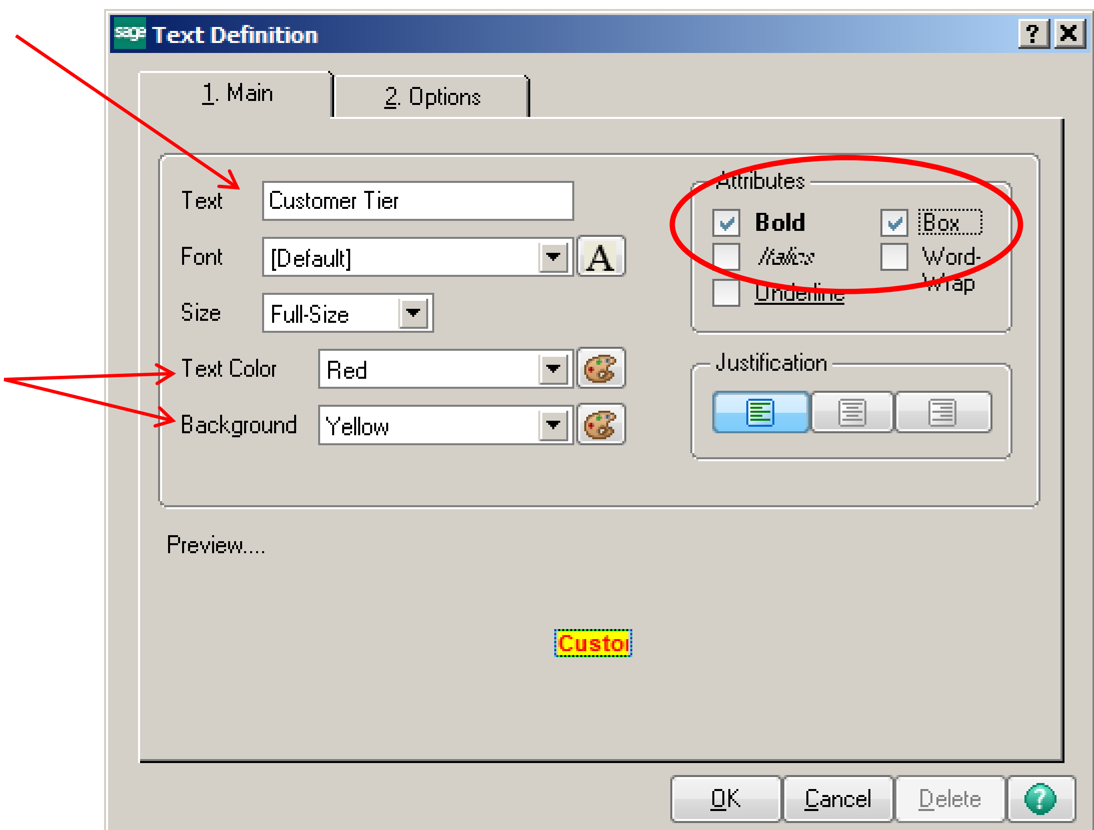


The Customizer Panel Selection box will appear. Create a New Customized Panel or choose to Modify an Already Customized Panel.

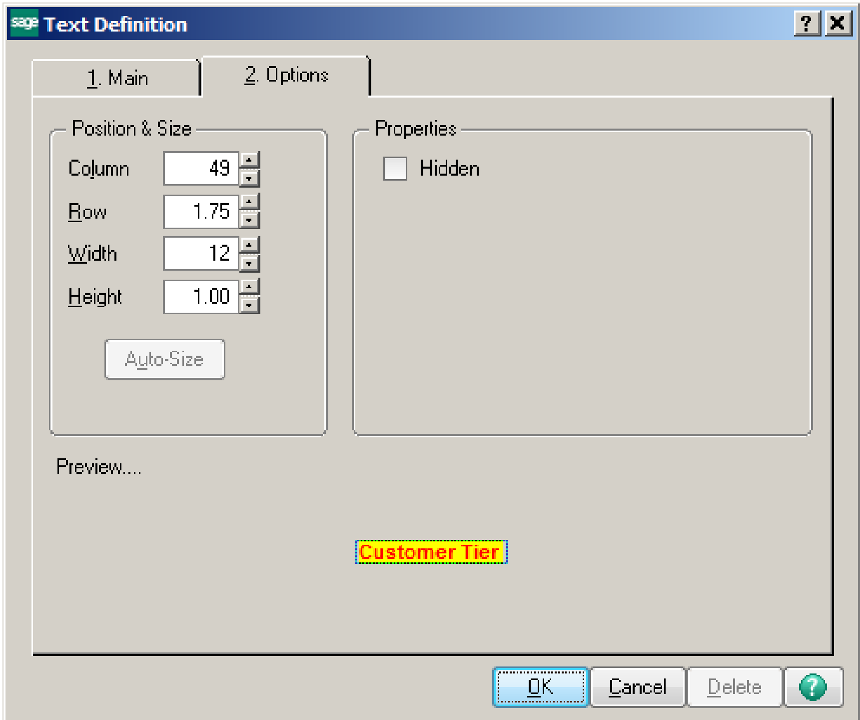


Right click on the field that you would like to Edit. On the Main tab, make your changes to the field, such as field name, font size, style, color, etc.

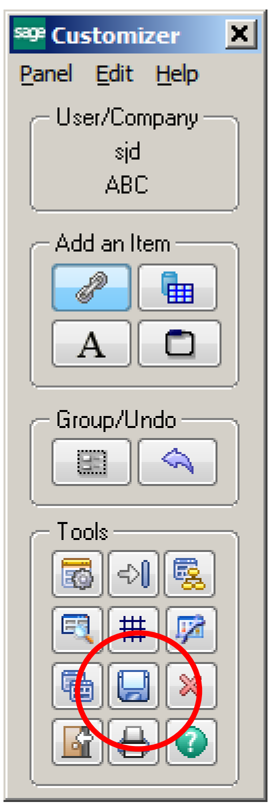




On the Options tab, adjust position and width of the field. Review the Properties of the field to see if there are any other requirements that you would like to change. Click Ok, then done.

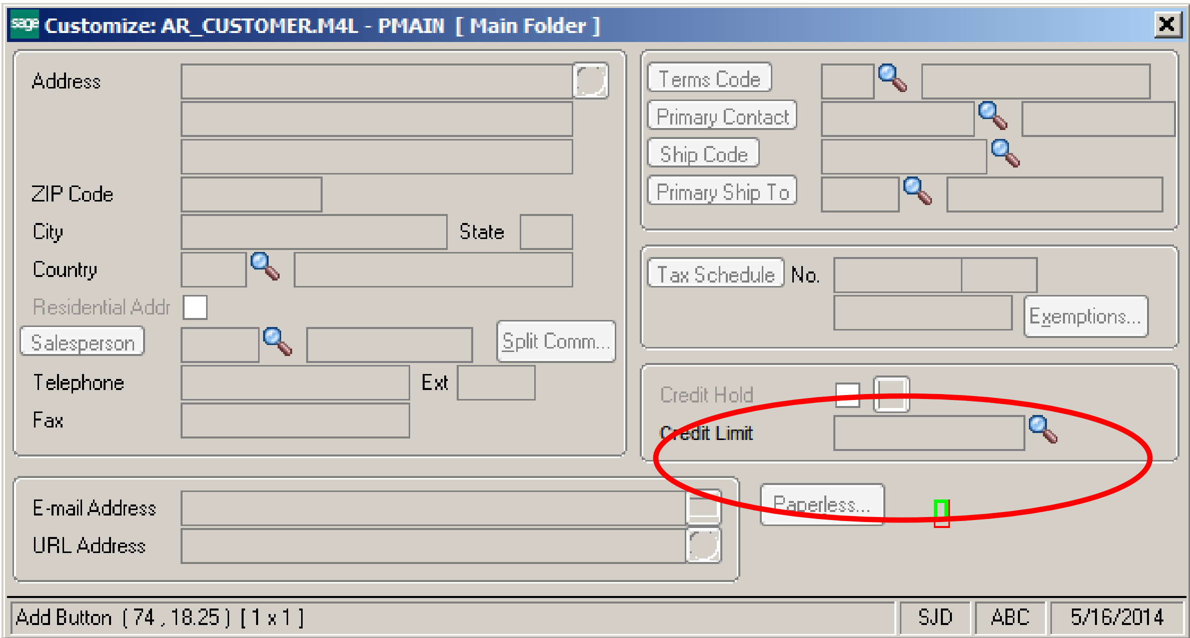


Click the Save button on the Customizer Toolbar.

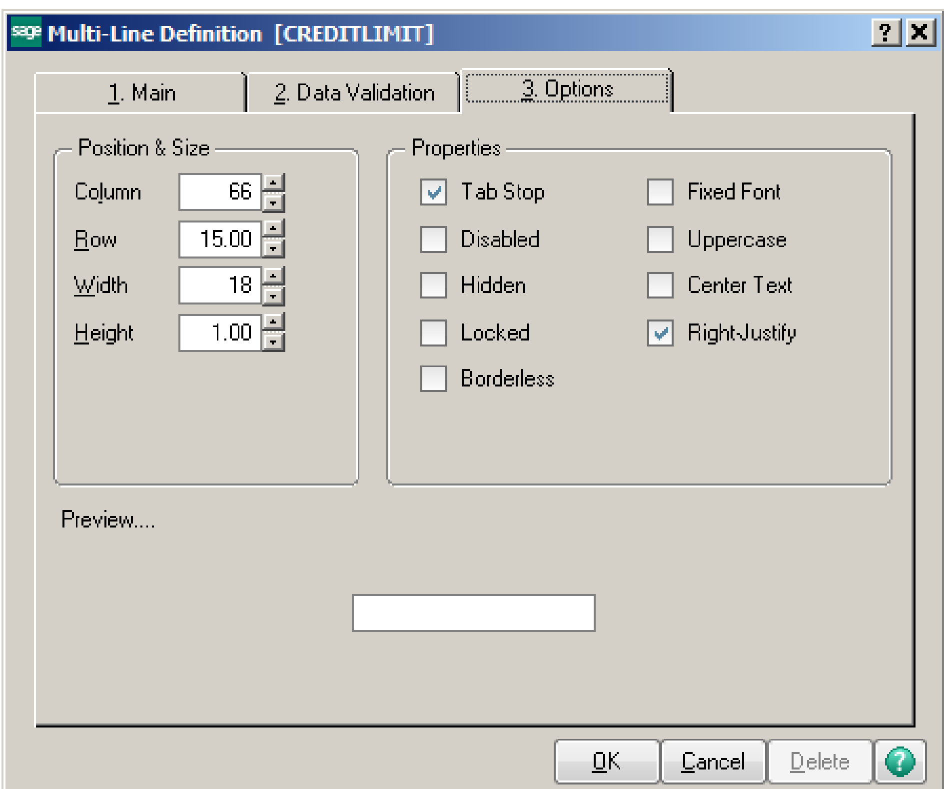


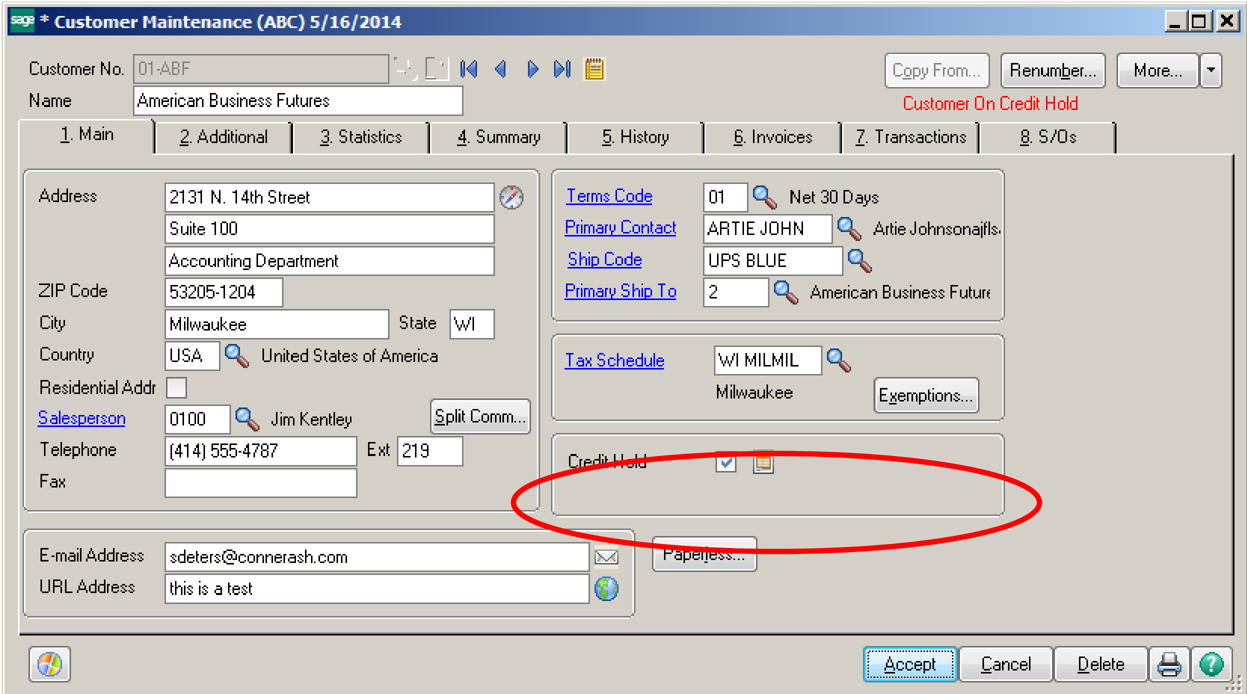
How to Hide a Field

Open the Customizer Panel that you would like to Edit.



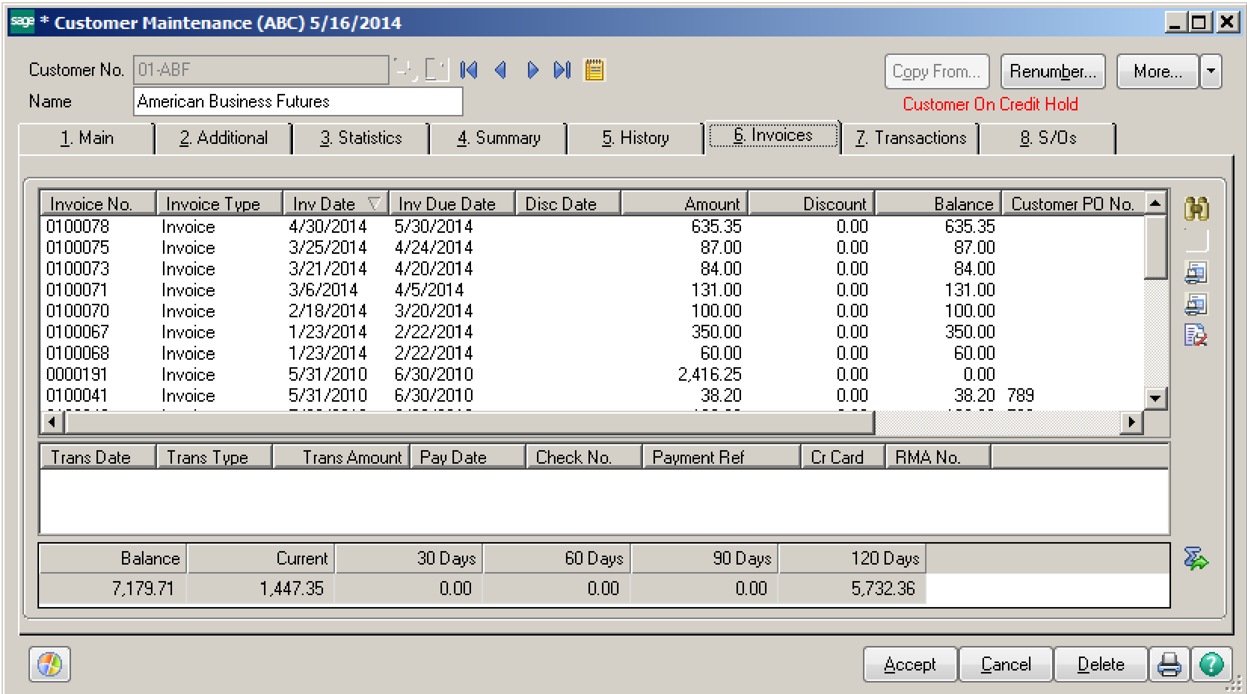
Right click on the field you would like to Hide. Then click on the Options tab. Select the Hidden button. Repeat for any other fields that you want to Hide. Click the Save button from the Customizer Tool bar when done.



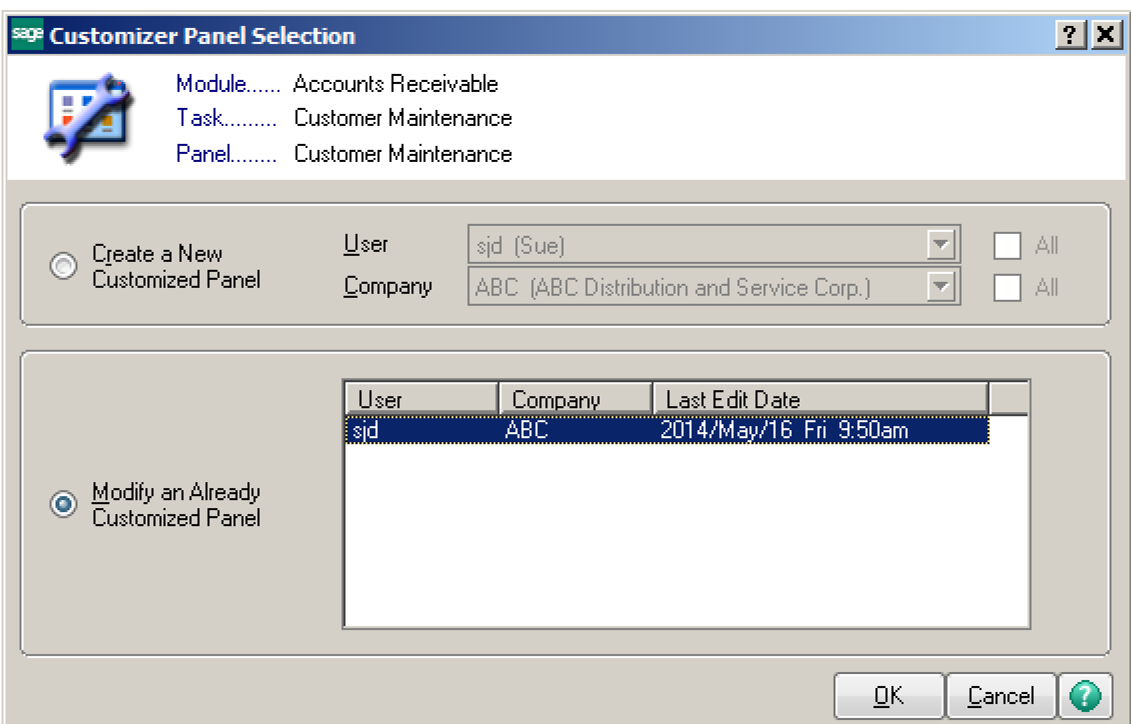

* Customer Maintenance (ABC) 5/16/2014
Customer No. 01-ABF
Name American Business Futures
Copy From...
Renumber...
More...
Customer On Credit Hold
1. Main
2. Additional
3. Statistics
4. Summary
5. History
6. Invoices
7. Transactions
8. S/Os
Address 2131 N. 14th Street
Suite 100
Accounting Department
ZIP Code 53205-1204
City Milwaukee
State WI
Country USA United States of America
Residential Addr
Salesperson 0100 Jim Kentley
Split Comm...
Telephone (414) 555-4787
Ext 219
Fax
Terms Code 01 Net 30 Days
Primary Contact ARTIE JOHN Artie Johnsonajfls
Ship Code UPS BLUE
Primary Ship To 2 American Business Future
Tax Schedule WI MILMIL
Milwaukee
Exemptions...
Credit Hold
E-mail Address sdeters@connerash.com
URL Address this is a test
Paperless...
Accept
Cancel
Delete

How to Edit Columns on Screen

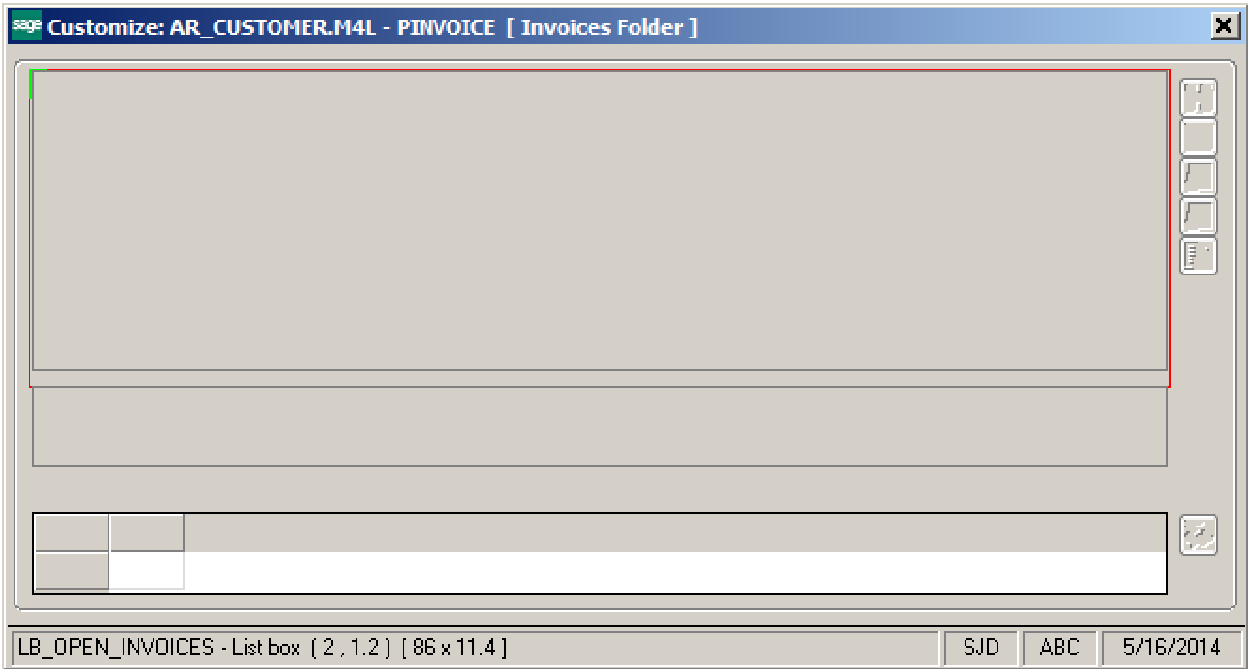
Select the screen to edit. Right click in gray area and select Panel Settings, then Customizer.



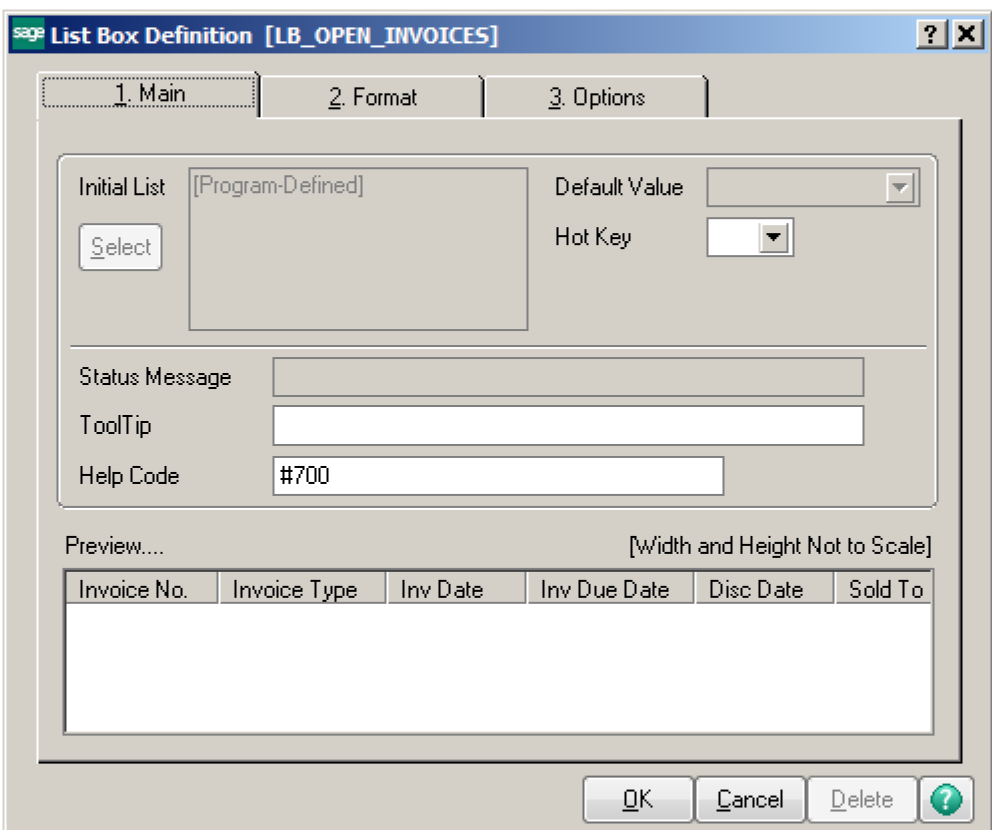
The Customizer Panel Selection box will appear. Create a New Customized Panel or choose to Modify an Already Customized Panel.



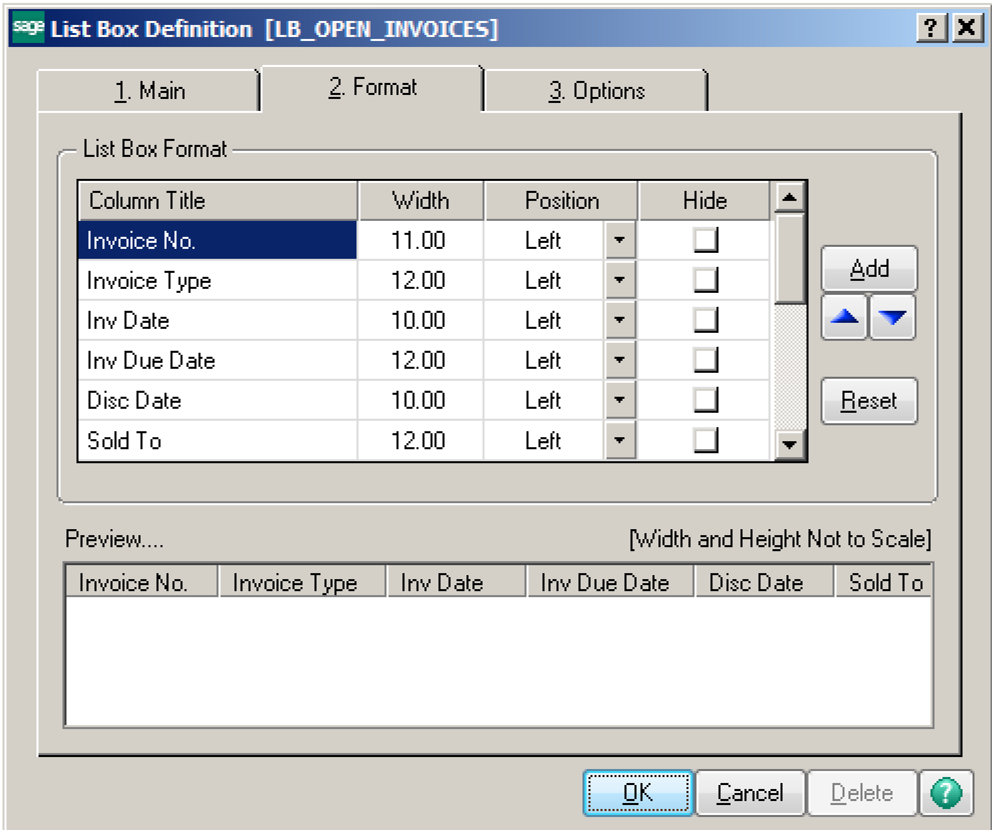
Right click in the Panel box.

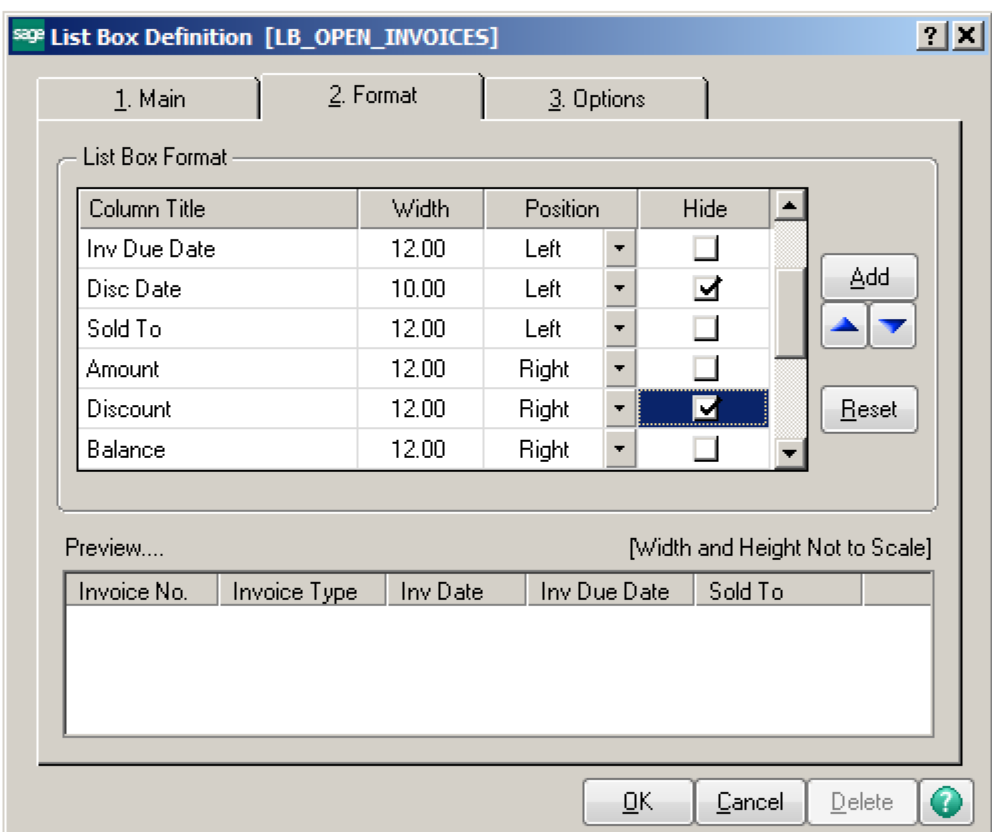


The List Box Definition box will appear. Click on the 2.Format tab.

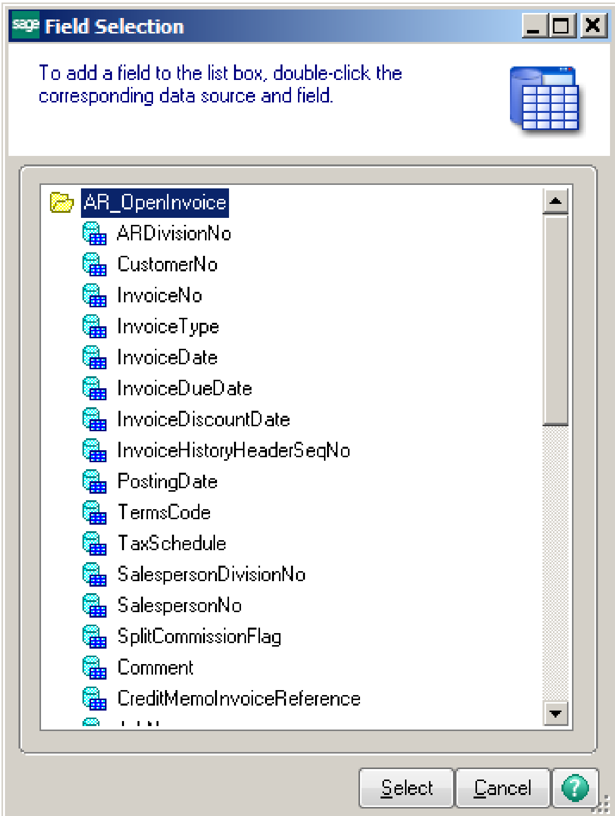


Select the fields to edit.



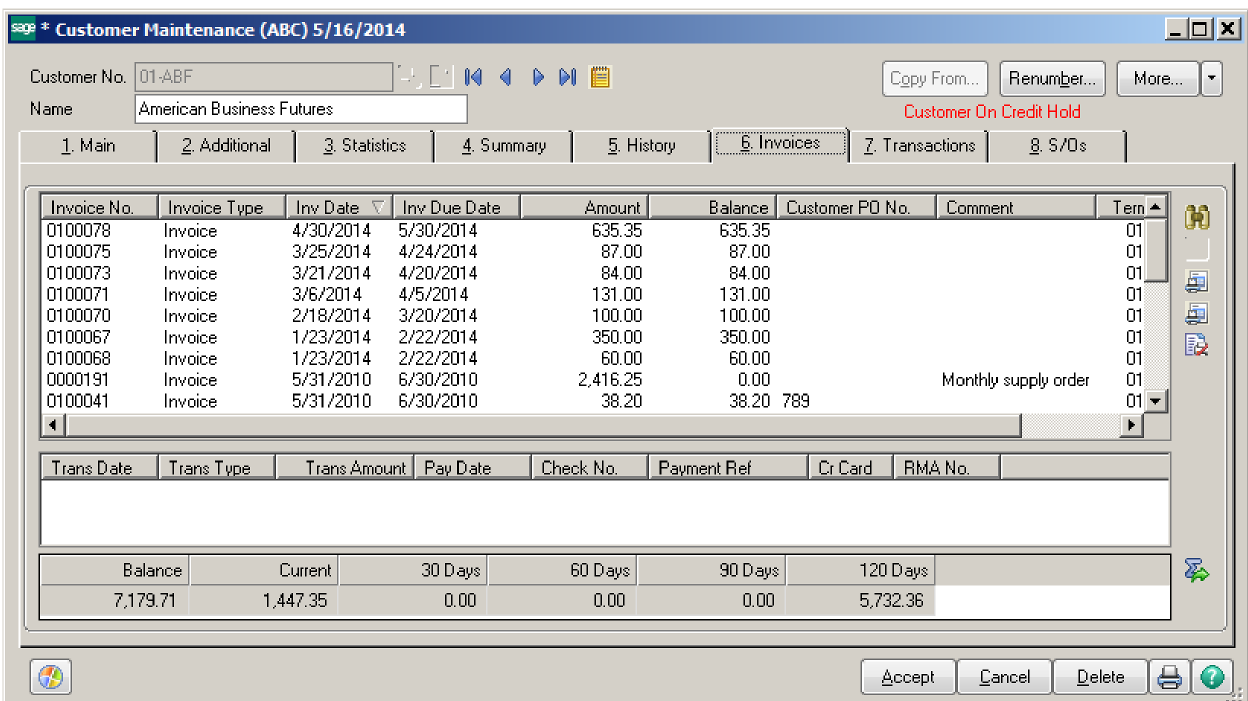


You can also click the Add button to select fields that are not currently on the screen. If you have created UDF fields, they will be on this list.



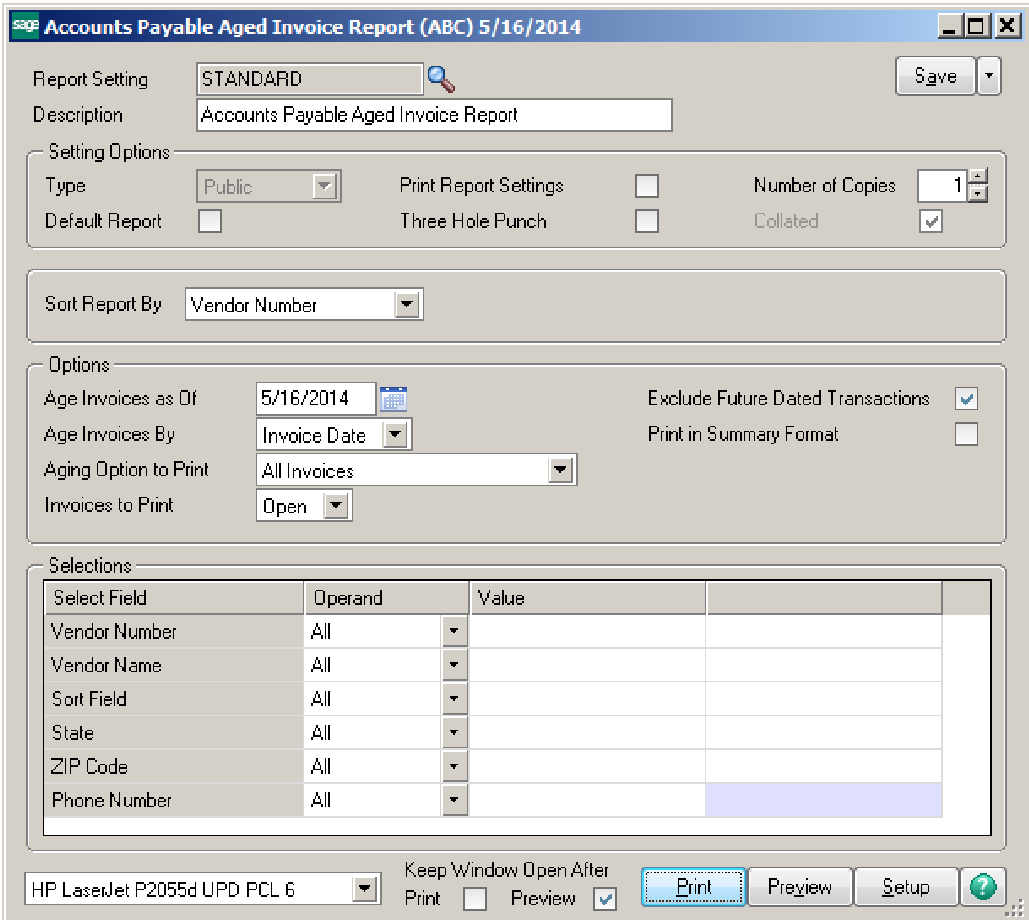
Click the Save button from the Customizer Toolbar when done.

The screen will now have the changes that you made.

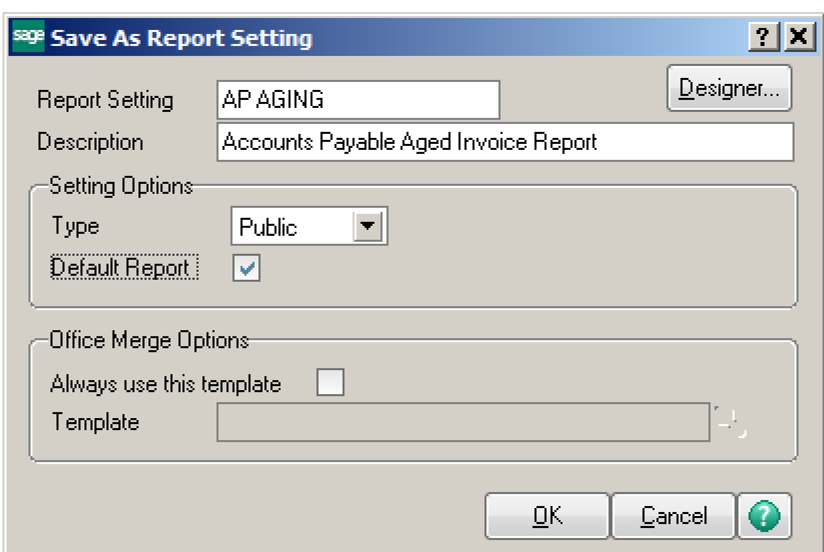


How to Edit an Existing Report Using Crystal

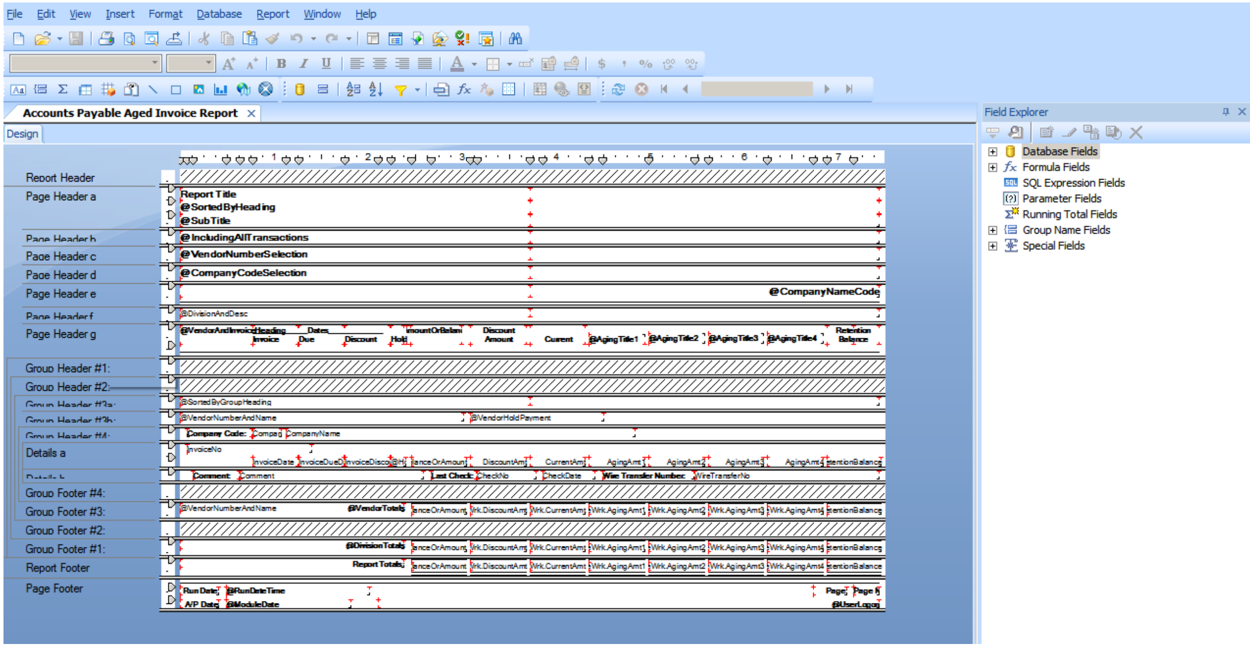
Select the report that you would like to Edit.



Click on the down arrow next to the Save button. Choose Save As. At the Report Setting field enter a new report name. Click on the Default Report button if you would like this to be your default report.



Click the down arrow next to the Save button again and choose Designer. This will open your custom report up in Crystal.



Select the fields you would like to edit and make your changes.

Notes: Remove Invoice Discount, Hold Payment, and Discount Amount. Remove Discount Amount from Footers. Move other footer fields over, align bottoms. Then move the Invoice Date and Invoice Due Date over. Highlight all fields in Details A and move up. Then move bar up. Save.

The report can now be run with your changes.