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.

^{sage} * Customer Maintenance (ABC) 5/16/2014	
Customer No. 01-ABF	Copy From Renumber More Customer On Credit Hold
1. Main 2. Additional 3. Statistics 4. Summ	
Comment Call Ed for credit approval. Open Item Customer Internet Enabled Customer Status Active Inactive Reason Internet Enabled Data Entry Inactive Reason Data Entry Internet Enabled Price Level 1 Dift Pymt Type NONE Discount Rate .000 % Fin Charge Rate 1.500% Item Code WIDGET 8" x 10" Widgets	Printing Sort AMER Customer Type A2 Statement Cycle M Print Dun Message Batch Fax Primary Credit Card Information Card ID Payment Type Cardholder Name Last Four Digits Expiration Date Credit Cards
<u> </u>	

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

🔓 Customizer Panel Sele	ction				? ×
	Accounts Receir Customer Mainte Customer Mainte	nance			
Create a New Customized Panel	<u>U</u> ser <u>C</u> ompany	sid (Sue) ABC (ABC Distrib	ution and Service	Corp.)	All All
 Modify an Already Customized Panel 	User sid	Company ABC	Last Edit Date 2013/Nov/21	Thu 5:45pm	
				<u>0</u> K (Cancel 🕜

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.

^{sage} Text Definition	<u>? X</u>
<u>1</u> . Main <u>2</u> . Options	
Text Sort Font [Default] A Size Full-Size Text Color [Default] Background [Default]	Justification
Preview Sort	
	<u>DK</u> <u>Cancel</u> elete

 ^P Text Definition	<u>? ×</u>
<u>1</u> . Main <u>2</u> . Options	
Text Customer Tier Font [Default] • A Size Full-Size • Text Color Red • 66 Background Yellow • 66	Attributes Bold Box <i>Kalica</i> Word- Underline Justification
Preview	
	<u>OK</u> <u>Cancel</u> elete

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.

🔓 Text Definition		<u>? ×</u>
<u>1</u> . Main <u>2</u> . Options]	
Position & Size Column 49 × Bow 1.75 × Width 12 × Height 1.00 ×	Properties	
Preview	Customer Tier	
	<u><u>D</u>elete</u>	

Click the Save button on the Customizer Toolbar.

🔓 Customizer 🛛 🗙
<u>P</u> anel <u>E</u> dit <u>H</u> elp
- User/Company
sjd
ABC
- Add an Item
Group/Undo
- Tools
🛛 🐻 🖓 🕵 🗌

^{sege} Customize: A	R_CUSTOMER.M4L - PMAIN [Main Folder]	×
Address		erms Code Q 'rimary Contact Q Ship Code Q
ZIP Code	P	Primary Ship To
City	State	
Country		ax Schedule No.
Residential Addr		Exemptions
Salesperson	Split Comm	
Telephone	Ext C	Credit Hold
Fax		edit Limit
E-mail Address		Paperless
URL Address		
Add Button (74,1	18.25) [1 x 1]	SJD ABC 5/16/2014

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.

999 Multi-Line Definition	CREDITLIMIT]	? ×
<u>1</u> . Main	Data Validation 3. Options	
Position & Size Column 66 Bow 15.00 Width 18 Height 1.00	Properties Image: Tab Stop Image: Disabled Image: Disabled Image: Disabled Image: Hidden Image: Locked Image: Borderless	
Preview		
	<u>D</u> K <u>Cancel</u> el	ete 🕜

⁸³⁹⁸ * Customer M	aintenance (ABC) 5/16/2014			×
Customer No. 01 Name Am	ABF		Copy From Renumber More	•
<u>1</u> . Main	2. Additional 3. Statistics 4. Summary	5. History	<u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . S/Os	
Address ZIP Code City Country Residential Addr <u>Salesperson</u> Telephone Fax	2131 N. 14th Street Suite 100 Accounting Department 53205-1204 Milwaukee State WI USA United States of America 0100 Jim Kentley [414) 555-4787 Ext 219	Terms Code Primary Contact Ship Code Primary Ship To Tax Schedule Credit Hold	01 Net 30 Days ARTIE JOHN Artie Johnsonajfls- UPS BLUE American Business Future WI MILMIL American Business Future WI MILMIL Exemptions	
E-mail Address URL Address	sdeters@connerash.com this is a test		aliszer	
()			Accept Cancel Delete)

	1-ABF	F .		Þ ÞI 📋			Copy From	Renum <u>b</u> er	More
ame A	merican Business	Futures					Customer On I	Credit Hold	
<u>1</u> . Main	2. Additional	<u>3</u> . Statist	ics <u>4</u> . Sumi	mary <u>5</u> . Hi	istory <u>6</u> . Invo	ices <u>7</u> . T	ransactions	<u>8</u> . S/Os	
Invoice No.	Invoice Type	Inv Date ⊽	Inv Due Date	Disc Date	Amount	Discount	Balance	Customer PO N	lo. 🔺 🕅
0100078	Invoice	4/30/2014	5/30/2014		635.35	0.00	635.35		
0100075	Invoice	3/25/2014	4/24/2014		87.00	0.00	87.00		
0100073	Invoice	3/21/2014	4/20/2014		84.00	0.00	84.00		5
0100071	Invoice	3/6/2014	4/5/2014		131.00	0.00	131.00		
0100070	Invoice	2/18/2014	3/20/2014		100.00	0.00	100.00		
0100067	Invoice	1/23/2014	2/22/2014		350.00	0.00	350.00		
0100068	Invoice	1/23/2014	2/22/2014		60.00	0.00	60.00		
0000191	Invoice	5/31/2010	6/30/2010		2,416.25	0.00	0.00		
0100041	Invoice	5/31/2010	6/30/2010		38.20	0.00	38.20	789	_
•									•
Trans Date	Trans Type	Trans Amou	unt Pay Date	Check No.	Payment Ref	Cr Card	RMA No.		
Bala	ance	Current	30 Diays	60 Diays	90 Diays	1201	Days		
7,179	9.71 1,4	447.35	0.00	0.00	0.00	5,73	2.36		

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.

Selection Selection Selection	ion	? ×
Task Cus	counts Receivable stomer Maintenance stomer Maintenance	
Create a New Customized Panel	User sjd (Sue) Company ABC (ABC Distribution and Service Corp.)] All] All
Modify an Already Customized Panel	User Company Last Edit Date sid ABC 2014/May/16 Fri 9:50am	
	<u> </u>	el 🕜

Right click in the Panel box.

⁸⁹⁹ Customize: AR_CUSTOMER.M4L - PINVOICE [Invoices Folder]			×
LB_OPEN_INVOICES - List box (2, 1.2) [86 x 11.4]	SJD	ABC	5/16/2014

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

List Box Definit	tion [LB_OP	EN_INVOICES	1		?
<u>1</u> . Main	2	Format	<u>3</u> . Options	1	
Initial List [P	rogram-Define	d]	Default Value Hot Key		_
Status Messag ToolTip	je				
Help Code	#700				
Preview			[Width	and Height N	ot to Scale]
Invoice No.	Invoice Typ	e Inv Date	Inv Due Date	Disc Date	Sold To
			<u>_</u> K	<u>C</u> ancel	<u>D</u> elete

Select the fields to edit.

ist Box Definiti	on [LB_OPEN	_INVOICES]				3	2
<u>1</u> . Main	<u>2</u> . Fo	ormat	<u>3</u> . Opt	ions				
– List Box Format								1
Column Title		Width	Position		Hide			
Invoice No.		11.00	Left	-				
Invoice Type		12.00	Left	-			Add	
Inv Date		10.00	Left	-			▲ 🔻	
Inv Due Date		12.00	Left	-				
Disc Date		10.00	Left	-			<u>R</u> eset	
Sold To		12.00	Left	-		Ē		
								ļ
Preview				[Wid	th and He	eight No	ot to Scale]	
Invoice No.	Invoice Type	Inv Date	Inv Du	e Date	Disc I	Date	Sold To	
				<u>0</u> K	<u>C</u> ano	el [Delete	0

st Box Definit	ion [LB_OPEN	_INVOICES	1		
<u>1</u> . Main <u>2</u> . F		Format <u>3</u> . Options			
List Box Forma	ıt				
Column Title		Width	Position	Hide	_
Inv Due Date		12.00	Left 🝷		
Disc Date		10.00	Left 🝷	4	Add
Sold To		12.00	Left 🝷		
Amount		12.00	Right 💌		-
Discount		12.00	Right 💌	⊻	<u>R</u> eset
Balance		12.00	Right 🝷		_
Preview			[M	/idth and H	eight Not to Scal
	Invoice Type	Inv Date	Inv Due Da	ate Sold	T_

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.

^{sage} Field Selection	
To add a field to the list box, double-click the corresponding data source and field.	
AR_OpenInvoice ARDivisionNo ADivisionNo LastomerNo InvoiceNo InvoiceType InvoiceDate InvoiceDueDate InvoiceHistoryHeaderSeqNo PostingDate TermsCode TaxSchedule SalespersonDivisionNo SalespersonDivisionNo SplitCommissionFlag Comment CreditMemoInvoiceReference	
	Cancel 🕢

Click the Save button from the Customizer Toolbar when done.

Panel Edit Help
User/Company sjd ABC
Add an Item
Group/Undo
- Tools
Panel

The screen will now have the changes that you made.

ame	01-ABF American Busine	oo Futuroo		Þ ÞI 📋		C <u>o</u> py F		More
ane	American Busine	ssrutures					omer On Credit Hold	
<u>1</u> . Main	2. Addition	al <u>3</u> . Stati	stics <u>4</u> . Sumr	mary <u>5</u> . Hist	ory <u>6</u> . Inv	oices <u>7</u> . Transa	ctions <u>8</u> . S/Os	
Invoice No	. Invoice Type	Inv Date	7 Inv Due Date	Amount	Balance	Customer PO No.	Comment	
0100078	Invoice	4/30/2014	5/30/2014	635.35	635.35			01
0100075	Invoice	3/25/2014	4/24/2014	87.00	87.00			01
0100073	Invoice	3/21/2014	4/20/2014	84.00	84.00			01
0100071	Invoice	3/6/2014	4/5/2014	131.00	131.00			
0100070	Invoice	2/18/2014	3/20/2014	100.00	100.00			01 🧔
0100067	Invoice	1/23/2014	2/22/2014	350.00	350.00			01
0100068	Invoice	1/23/2014	2/22/2014	60.00	60.00			01
0000191	Invoice	5/31/2010	6/30/2010	2,416.25	0.00		Monthly supply order	01
0100041	Invoice	5/31/2010	6/30/2010	38.20	38.20	789		01 🚽
•								
Trans Date	Trans Type	Trans Am	ount Pay Date	Check No.	Payment Ref	Cr Card RMA	No	
			bank 1 dy D'die	Check No.	T dynoric rroi		110.	
		Current	30 Days	60 Days	90 Days	120 Days		 ¥
E	lalance			0.00	0.00	5,732,36		
		Current	30 Days		· · · ·			

	ole Ageo	l Invoice Re	eport (ABC) 5/16/2014		>
Report Setting Description	STAND Accourt)ARD hts Payable Ag	ged Invoice	Report		S <u>a</u> ve 💌
Setting Options — Type Default Report	Public	Y		port Settings ole Punch	Number of Co Collated	pies 1×
Sort Report By	Vendor N	lumber	-			
Options Age Invoices as O Age Invoices By Aging Option to Pr Invoices to Print	rint	5/16/2014 Invoice Date All Invoices Open 💌			 Future Dated Tran Summary Format	sactions 🔽
Selections Select Field		Operar	1	Value		
Vendor Number		All	-iu +	value		
		All	-			
Vendor Name		0				
Vendor Name Sort Field		All	•			
			•			
Sort Field		All				

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.

🔓 Save As Repo	t Setting ? 🗙
Report Setting	AP AGING
Description	Accounts Payable Aged Invoice Report
-Setting Options-	
Туре	Public 💌
Default Report	
L	
Office Merge Opt	ions
Always use this t	
Template	L
` <u> </u>	
	<u> </u>

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

	▼ A* A* B I U ⋿ ⋿ ≡ ≡ <u>A</u> + ⊞ + ⊯ ፼ ፼ \$ * % ⊗ ⊗	
ι 🗄 Σ 📻 🚻 🐴	ヽ ロ 四 🖬 🌒 🛇 🗄 📴 台 🌱 - 白 🏡 🏷 🔟 🎚 🌭 🗎 : 🕮 🛇 H 🤞 🔛	
Accounts Payable Age	d Invoice Report ×	Field Explorer 4
sign		〒 A1 ビ / Ha Db ×
	ᅟᅟᅟᅟ ㆍ ㅎ ㅎ ㅎ ㆍ 1 ㅎ ㅎ ㆍ - ㅎ ㅎ ² ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ ㅎ	 Database Fields
Report Header		
Page Header a	Report Title	SQL Expression Fields
	© @SontedByHeading	∑ [™] Running Total Fields
Page Header b	VeSubTite	🕀 🔚 Group Name Fields
Page Header b Page Header c	e incloanguit ransaceons	🖭 🐨 Special Fields
Page Headeric Page Headerid	CompanyCodeSelection	
	CompanyNameCode CompanyNameCode	
Page Header e		
Pane Headerf	2 BOwielonAndDesc	
Page Header g	Performanter in the second secon	
Group Header #1:		
Group Header #2:		
Gmun Haadar #?a-	Constructive Construction Construction	
Gmun Haadar #9h-	VendorNumberAndName PevendorHoldPayment	
Gmun Haarlar #A	Dampany Cade: Dompany Name	
Details a	InvaceNo	
Duralla L	Domment Domment Domment Det Deck Deck Deck Deck Deck Deck Deck Deck	
Group Footer #4:		
Group Footer #3:	V SvendarNumberAndName BV andar Tatal ScienceOrAmoury SkiClascourtAmy SVK AgingAmits SvK AgingAm	
Group Footer #2:	BOhisisenTatal and Discourding With Aging Ams 2 States and a States and Ams 2 States and Am	
Group Footer #1:	Report Total Jance Cr.Amourg Brk.DiscoursAm 2014.CurrentAms 2014.Aging.Ams 2014.Aging	
Group Footer #2: Group Footer #1: Report Footer Page Footer	Report Table Jacobio Discoursive With Aging Amt	

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.