

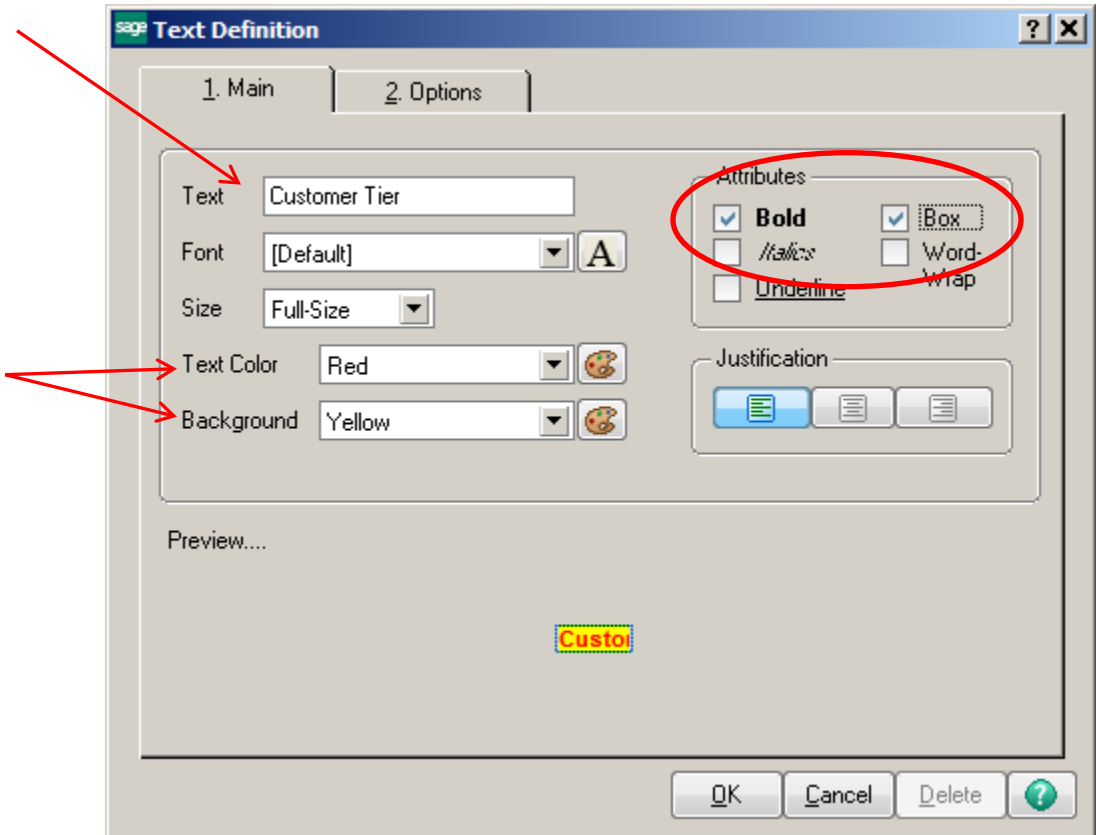
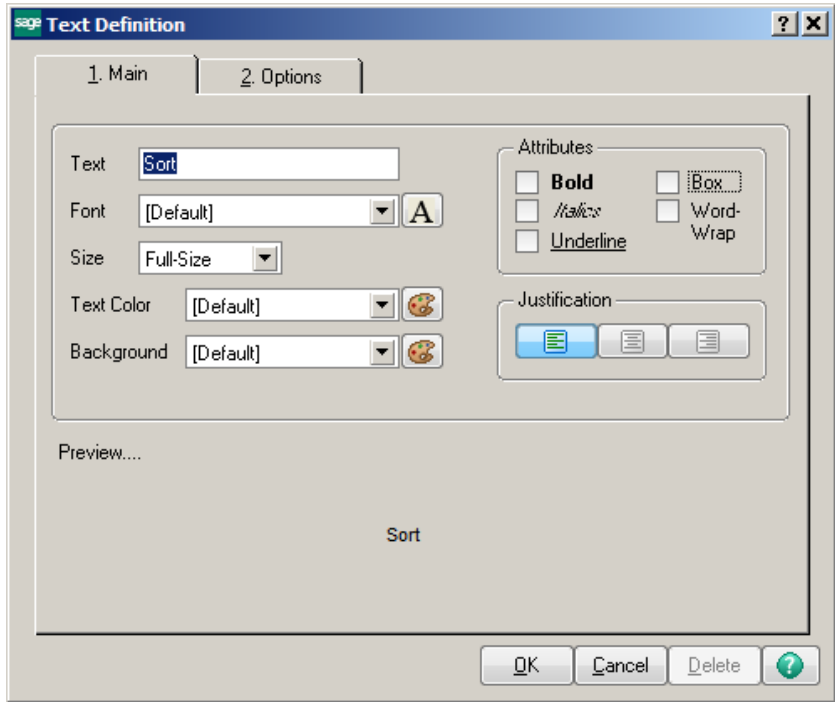
How to Modify Your Screen Using Custom Office

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

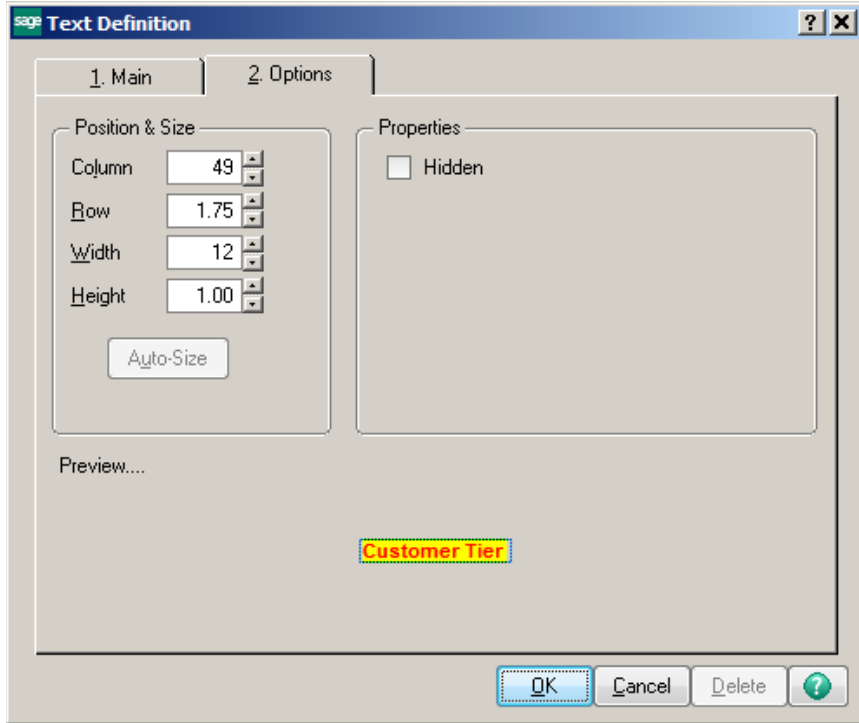
The Customizer Panel Selection box will appear. Create a New Customized Panel or choose to Modify an Already Customized Panel.

User	Company	Last Edit Date
sjd	ABC	2013/Nov/21 Thu 5:45pm

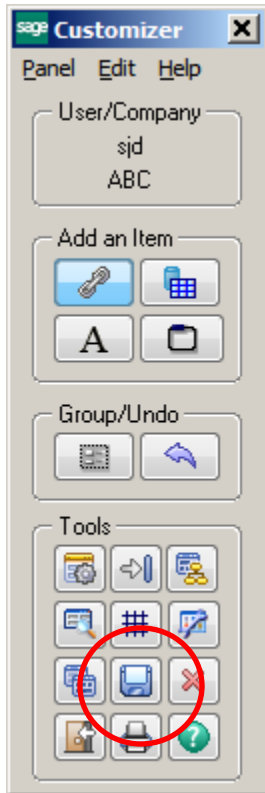
Right click on the field that you would like to Edit. On the Main tab, make your changes to the field, such as field name, font size, style, color, etc.



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.

The screenshot shows the Sage Customizer Panel for AR_CUSTOMER.M4L - PMAIN [Main Folder]. The interface is divided into several sections for field customization. The 'Credit Limit' field is highlighted with a red circle. Other fields include Address, ZIP Code, City, Country, Residential Addr, Salesperson, Telephone, Fax, Terms Code, Primary Contact, Ship Code, Primary Ship To, Tax Schedule No., Exemptions..., Credit Hold, Paperless..., E-mail Address, and URL Address. The bottom status bar shows 'Add Button (74 , 18.25) [1 x 1]', 'SJD', 'ABC', and '5/16/2014'.

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.

The screenshot shows the Sage Multi-Line Definition [CREDITLIMIT] dialog box. The 'Options' tab is selected, showing the following settings:

- Position & Size:
 - Column: 66
 - Row: 15.00
 - Width: 18
 - Height: 1.00
- Properties:
 - Tab Stop
 - Disabled
 - Hidden
 - Locked
 - Borderless
 - Fixed Font
 - Uppercase
 - Center Text
 - Right-Justify

At the bottom, there are buttons for 'OK', 'Cancel', 'Delete', and a help icon.

sage * Customer Maintenance (ABC) 5/16/2014

Customer No. 01-ABF
 Name American Business Futures
 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 Johnsonajfs.
 Ship Code: UPS BLUE
 Primary Ship To: 2, American Business Futur

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 screenshot shows the Sage Customer Maintenance window for customer ABC on 5/16/2014. The 'Invoices' tab is selected, displaying a list of invoices with columns for Invoice No., Invoice Type, Inv Date, Inv Due Date, Disc Date, Amount, Discount, Balance, and Customer PO No. Below the list is a summary table with columns for Balance, Current, 30 Days, 60 Days, 90 Days, and 120 Days.

Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Amount	Discount	Balance	Customer PO No.
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	
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

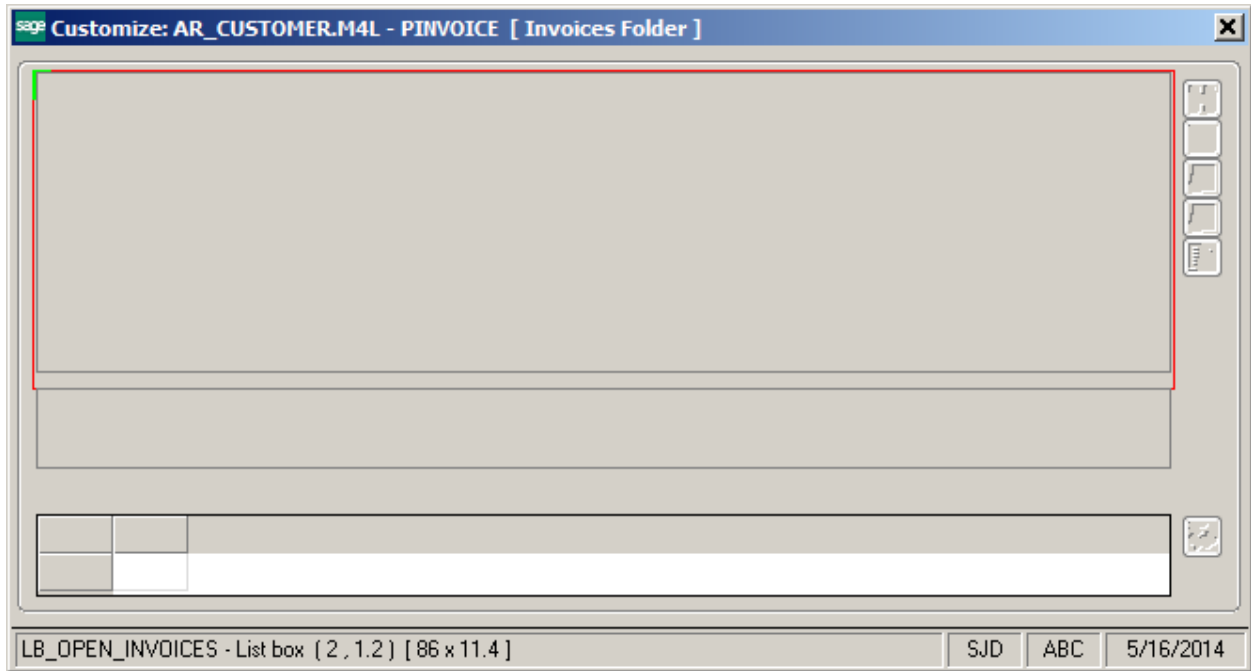
Balance	Current	30 Days	60 Days	90 Days	120 Days
7,179.71	1,447.35	0.00	0.00	0.00	5,732.36

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

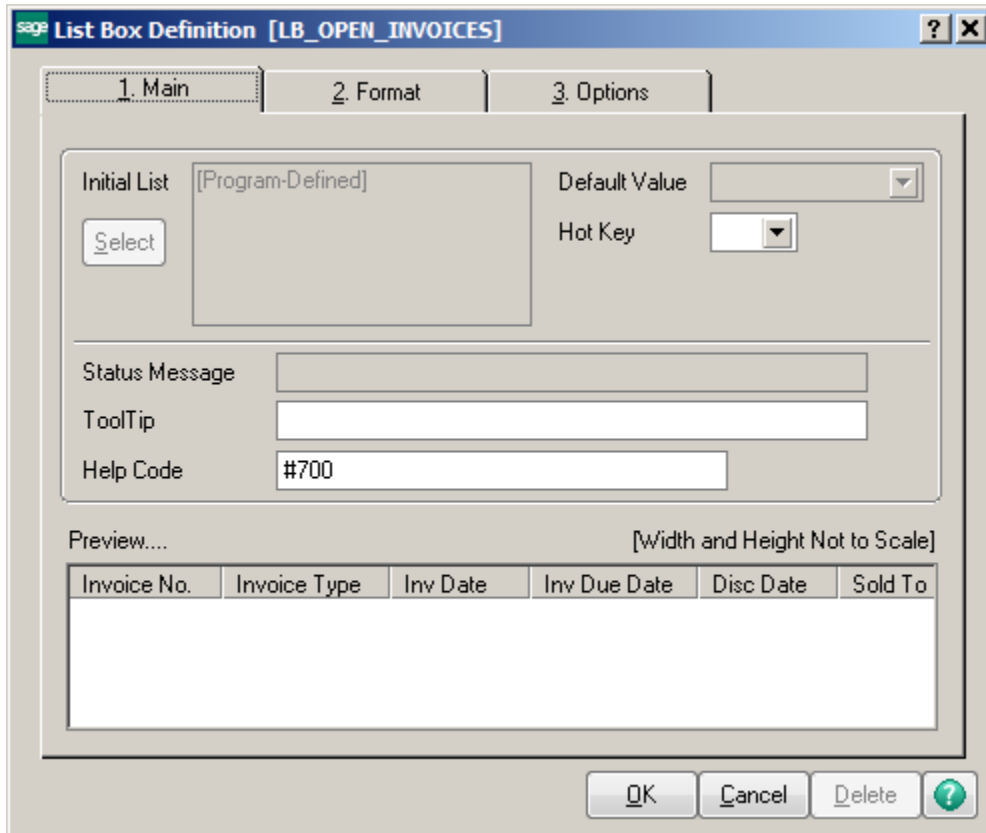
The screenshot shows the Sage Customizer Panel Selection dialog box. It displays the current configuration: Module: Accounts Receivable, Task: Customer Maintenance, and Panel: Customer Maintenance. There are two radio buttons: 'Create a New Customized Panel' (unselected) and 'Modify an Already Customized Panel' (selected). The 'Modify' option shows a table of existing panels.

User	Company	Last Edit Date
sjd	ABC	2014/May/16 Fri 9:50am

Right click in the Panel box.



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



Select the fields to edit.

sage List Box Definition [LB_OPEN_INVOICES] [?] [X]

1. Main | 2. Format | 3. Options

List Box Format

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"/>

Add

Reset

Preview... [Width and Height Not to Scale]

Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Sold To

OK Cancel Delete ?

sage List Box Definition [LB_OPEN_INVOICES] [?] [X]

1. Main | 2. Format | 3. Options

List Box Format

Column Title	Width	Position	Hide
Inv Due Date	12.00	Left	<input type="checkbox"/>
Disc Date	10.00	Left	<input checked="" type="checkbox"/>
Sold To	12.00	Left	<input type="checkbox"/>
Amount	12.00	Right	<input type="checkbox"/>
Discount	12.00	Right	<input checked="" type="checkbox"/>
Balance	12.00	Right	<input type="checkbox"/>

Add

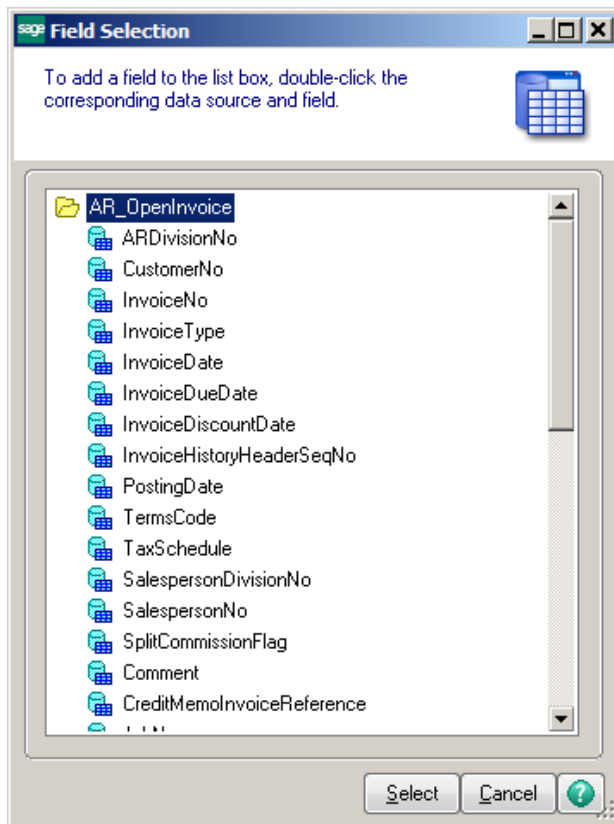
Reset

Preview... [Width and Height Not to Scale]

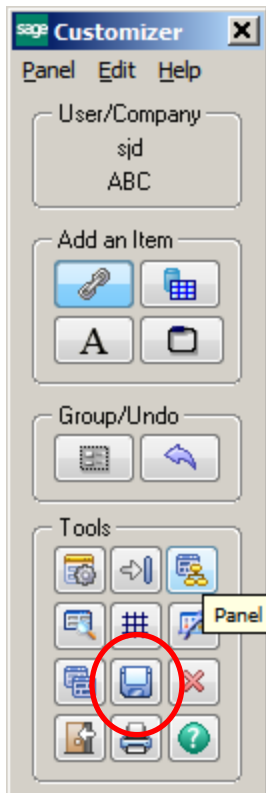
Invoice No.	Invoice Type	Inv Date	Inv Due Date	Sold To

OK Cancel Delete ?

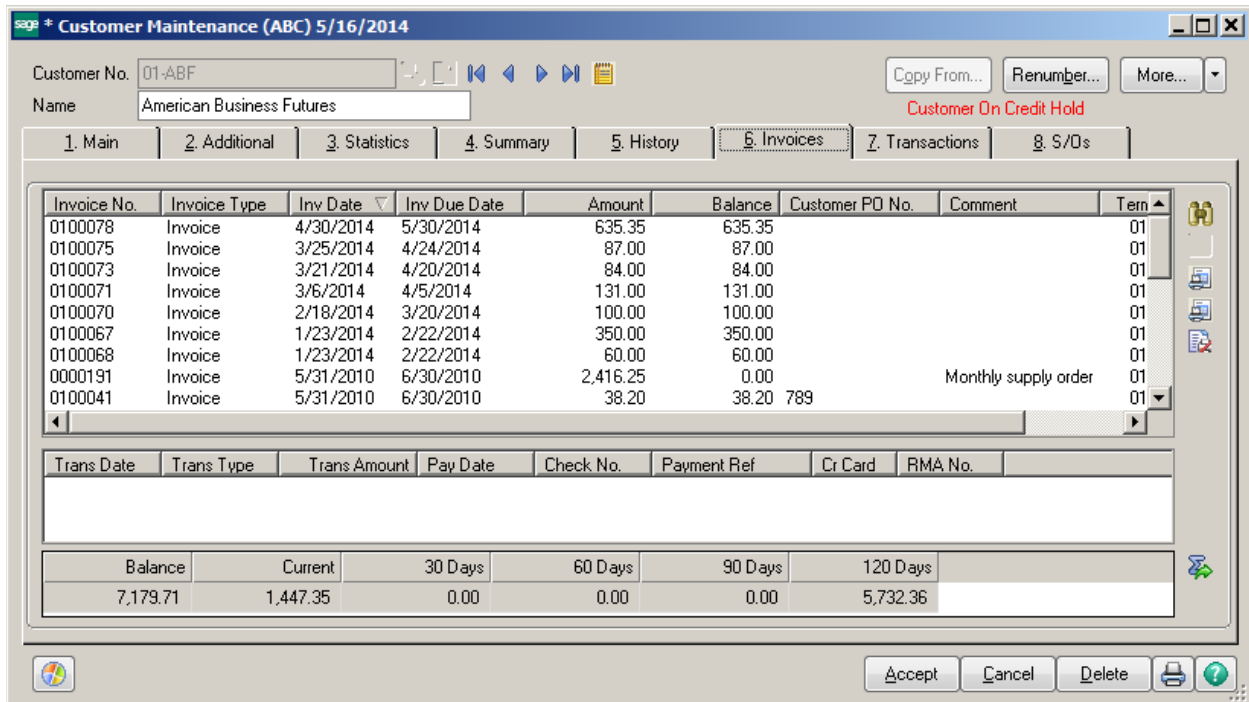
You can also click the Add button to select fields that are not currently on the screen. If you have created UDF fields, they will be on this list.



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.

Report Setting: STANDARD

Description: Accounts Payable Aged Invoice Report

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Sort Report By: Vendor Number

Options:

- Age Invoices as Of: 5/16/2014
- Age Invoices By: Invoice Date
- Aging Option to Print: All Invoices
- Invoices to Print: Open
- Exclude Future Dated Transactions:
- Print in Summary Format:

Select Field	Operand	Value
Vendor Number	All	
Vendor Name	All	
Sort Field	All	
State	All	
ZIP Code	All	
Phone Number	All	

HP LaserJet P2055d UPD PCL 6

Keep Window Open After: Print Preview

Buttons: Print, Preview, Setup

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.

Report Setting: AP AGING

Description: Accounts Payable Aged Invoice Report

Setting Options:

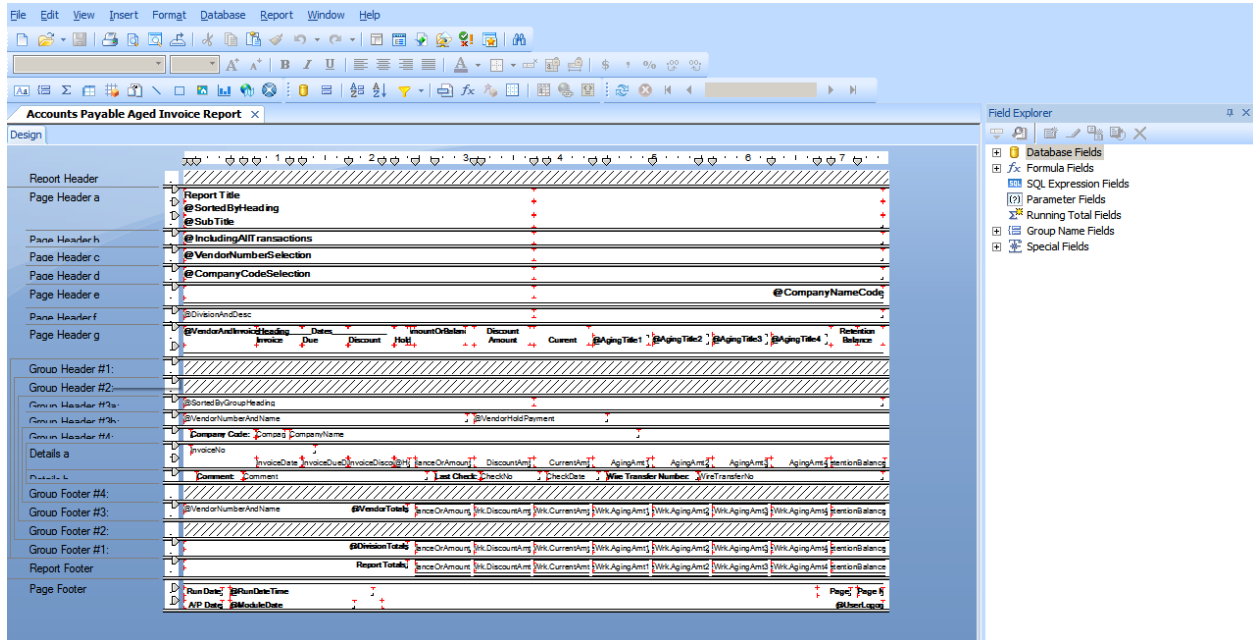
- Type: Public
- Default Report:

Office Merge Options:

- Always use this template:
- Template:

Buttons: OK, Cancel, ?

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.