

Customize Layout

Account | Billing | Stock | POS | Payroll



ISV/Software Solutions

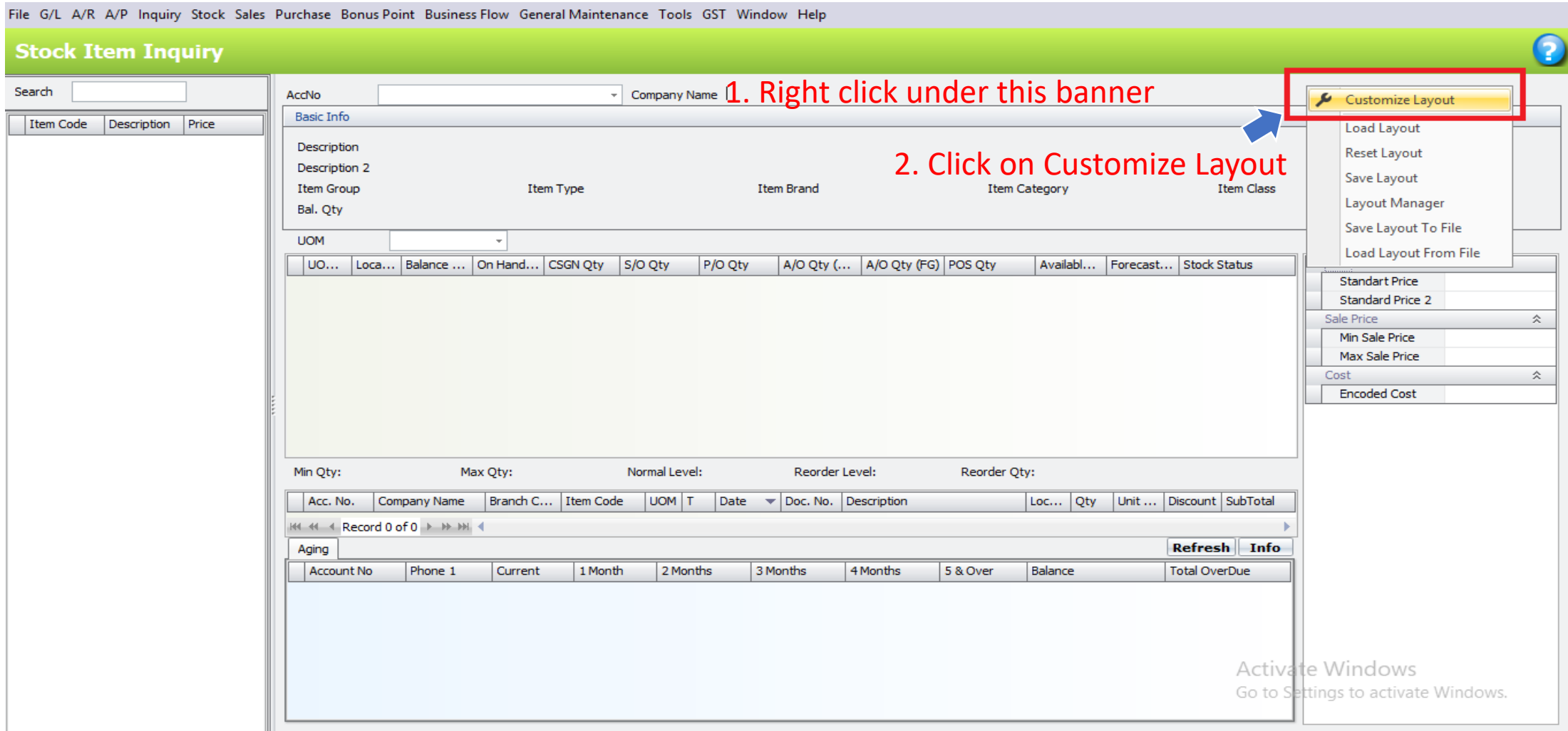


Introduction

- Allow interface layout to be custom-made for users
- More convenience and flexible for users to design and show the layout based on their own requirements.
- Customize layout can be done in Stock Inquiry, Stock, Sales and Purchase Transactions
- Layout can be set from Column Chooser.

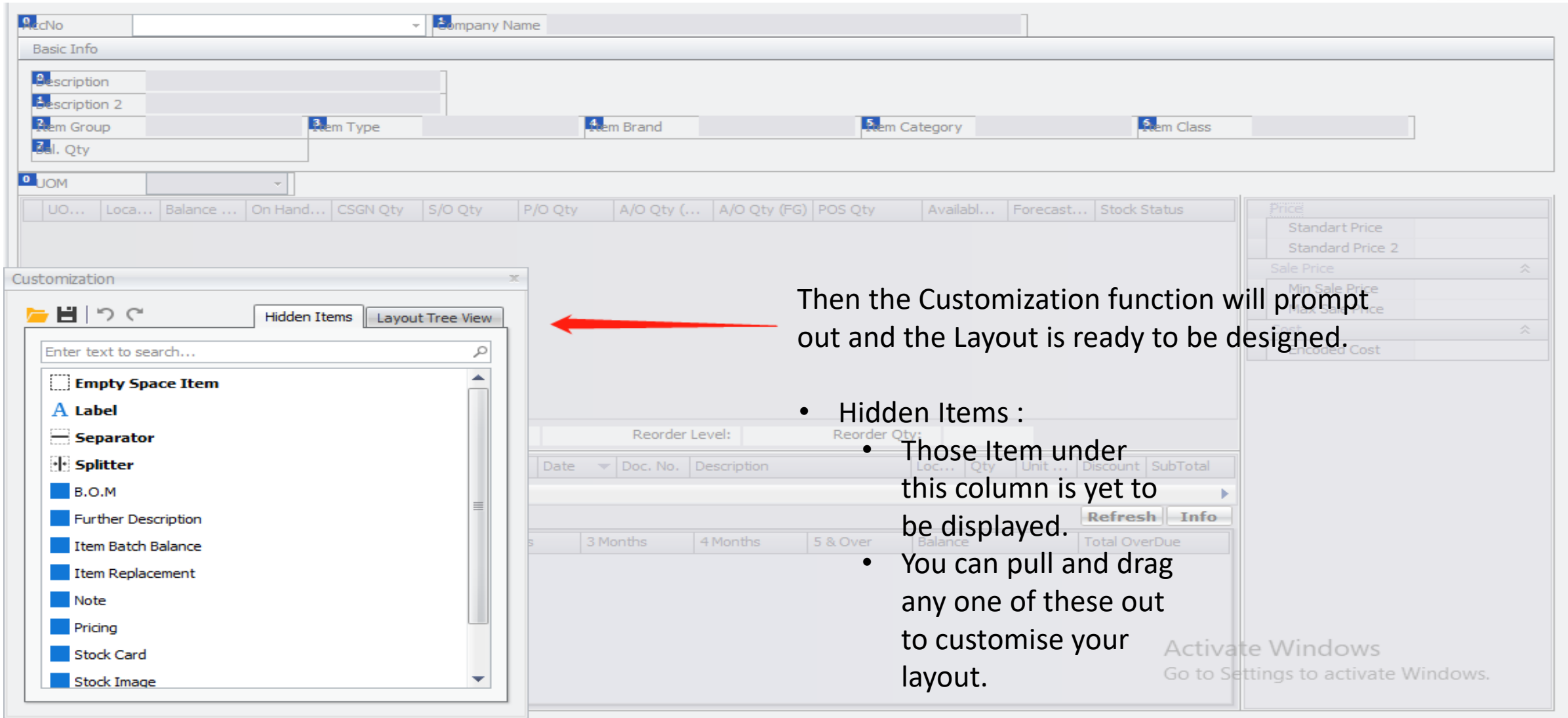
Stock Item

- Layout can be customized under Stock Item Inquiry, Stock Item Maintenance, Stock Take, Stock Adjustment, Stock Issue, Stock Receive, Stock Write-off, Stock UOM Conversion, Stock Update Cost, and Stock Transfer.



The screenshot displays the 'Stock Item Inquiry' application window. The title bar includes menu options: File, G/L, A/R, A/P, Inquiry, Stock, Sales, Purchase, Bonus Point, Business Flow, General Maintenance, Tools, GST, Window, Help. The main window has a green header with the title 'Stock Item Inquiry' and a help icon. Below the header, there is a search bar and a 'Company Name' dropdown. A red box highlights the 'Customize Layout' button in the top right corner, with a red arrow pointing to it and the text '1. Right click under this banner'. A blue arrow points to the 'Customize Layout' menu item in the dropdown, with the text '2. Click on Customize Layout'. The dropdown menu includes options: Load Layout, Reset Layout, Save Layout, Layout Manager, Save Layout To File, and Load Layout From File. The main area contains a 'Basic Info' section with fields for Description, Description 2, Item Group, Item Type, Item Brand, Item Category, Item Class, and Bal. Qty. Below this is a 'UOM' dropdown and a table with columns: UO..., Loca..., Balance..., On Hand..., CSGN Qty, S/O Qty, P/O Qty, A/O Qty (...), A/O Qty (FG), POS Qty, Availabl..., Forecast..., and Stock Status. At the bottom, there are fields for Min Qty, Max Qty, Normal Level, Reorder Level, and Reorder Qty, followed by a table with columns: Acc. No., Company Name, Branch C..., Item Code, UOM, T, Date, Doc. No., Description, Loc..., Qty, Unit..., Discount, and SubTotal. The table shows 'Record 0 of 0'. There are also 'Aging' and 'Refresh' buttons, and a table with columns: Account No., Phone 1, Current, 1 Month, 2 Months, 3 Months, 4 Months, 5 & Over, Balance, and Total OverDue. A watermark 'Activate Windows Go to Settings to activate Windows.' is visible in the bottom right corner.

Stock Item Inquiry



The screenshot displays the 'Stock Item Inquiry' application interface. At the top, there are input fields for 'RecNo' and 'Company Name'. Below this is a 'Basic Info' section with fields for 'Description', 'Description 2', 'Item Group', 'Item Type', 'Item Brand', 'Item Category', 'Item Class', and 'Bal. Qty'. A 'UOM' dropdown is also present. The main area features a grid with columns for 'UO...', 'Loca...', 'Balance ...', 'On Hand...', 'CSGN Qty', 'S/O Qty', 'P/O Qty', 'A/O Qty (...)', 'A/O Qty (FG)', 'POS Qty', 'Availabl...', 'Forecast...', and 'Stock Status'. A 'Customization' window is open in the foreground, showing a 'Hidden Items' tab and a 'Layout Tree View' with a search bar and a list of items: 'Empty Space Item', 'Label', 'Separator', 'Splitter', 'B.O.M', 'Further Description', 'Item Batch Balance', 'Item Replacement', 'Note', 'Pricing', 'Stock Card', and 'Stock Image'. A red arrow points from the 'Customization' window to the 'Hidden Items' column in the main grid. To the right of the grid, there is a 'Price' section with fields for 'Standart Price', 'Standard Price 2', 'Sale Price', 'Min Sale Price', 'Max Sale Price', 'Cost', and 'Encoded Cost'. At the bottom right, there is a watermark: 'Activate Windows Go to Settings to activate Windows.'

Then the Customization function will prompt out and the Layout is ready to be designed.

- Hidden Items :
 - Those Item under this column is yet to be displayed.
 - You can pull and drag any one of these out to customise your layout.

Stock Item Inquiry : Design Layout



Stock Item Inquiry

Search

Item Code	Description	Price

AccNo UOM Company Name

Basic Info

Description

Description 2

Item Group Item Type Item Brand

Item Category Item Class Bal. Qty

Sub-Item Code	Description	Qty	Overhead Cost
BOM			

Date :

Item Code	CSGN Cost	Location	Batch No.	UOM	Costing Method	B/F Qty	B/F Cost	Average B/F ...	Balance Qty	Balance Cost	Average Balanc...	On Hand Qty	On Hand Cost

Record 0 of 0

UO...	Loc...	Balanc...	On Ha...	CSGN Qty	S/O Qty	P/O Qty	A/O Qty ...	A/O Qty ...	POS Qty	Availab...	Forma...	Stock Status

Price

Standart Price

Standard Price 2

Sale Price ⌵

Min Sale Price

Max Sale Price

Cost ⌵

Encoded Cost

Min Qty: Max Qty: Normal Level: Reorder Level: Reorder Qty:

Acc. No.	Company Name	Branch ...	Item Code	U...	T	Date	Doc. ...	Description	Lo...	Qty	Unit...	Disco...	SubTotal

Record 0 of 0

Aging Refresh Info

Account No	Phone 1	Current	1 Month	2 Months	3 Months	4 Months	5 & Over	Balance	Total OverDue

2. Splitter is a flexible line which can be used to adjust the spacing of Stock Card along with the Stock Level.

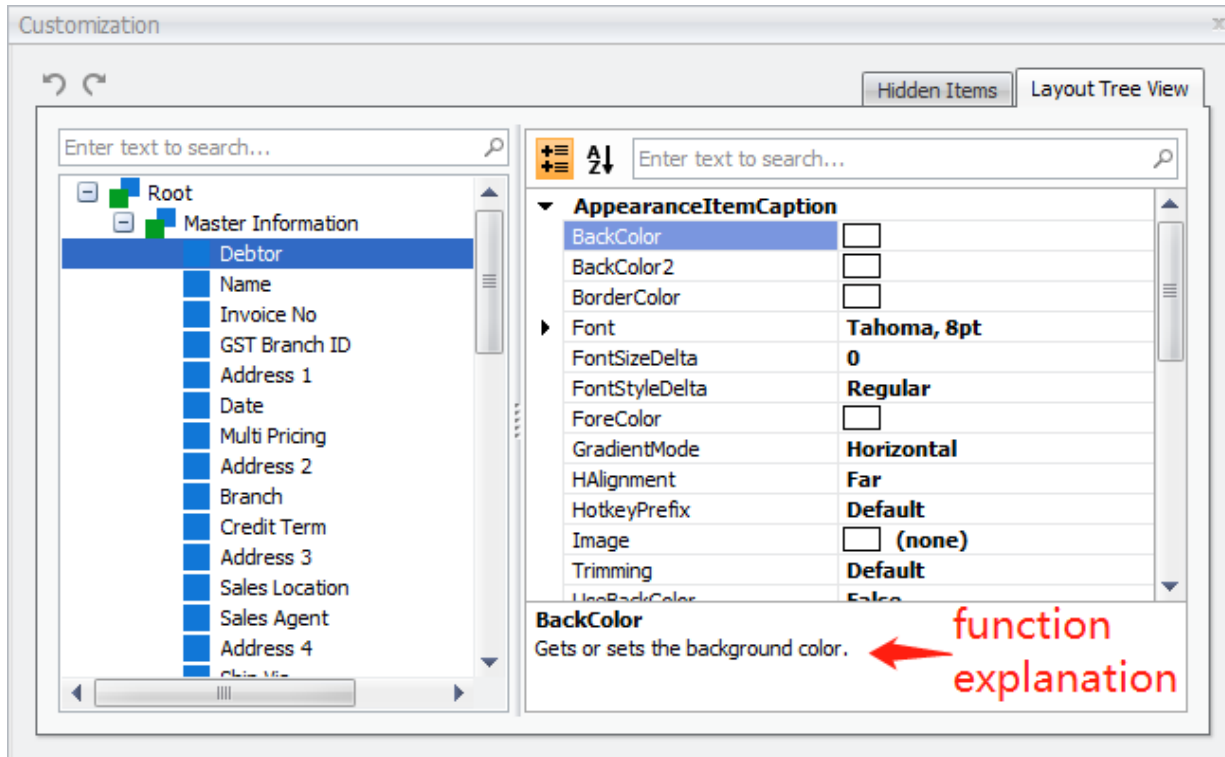
3. Empty Space Item is used for neatly purpose. Can also drag out BOM beside it and make adjustment.

4. Separator is a fixed line to separate the basic info and stock card.

1. User can drag out stock card from hidden item to make themselves more convenient to inquiry.

Sales & Purchase Transactions

- The way of layout design for Sales and Purchase transactions are the same as Stock Inquiry.
- There are more functions (with explanation) for customization in the layout tree view such as Appearance Item Caption, Control Option, Options Flow Layout Item, and also Text.
- These functions allow user to edit their displayed column based on their will.



Sales Invoice: Design Layout

Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Set GST Date Group Total Discount Item Package Change Unit Price Item Search Show Instant Info Copy from other Invoice Copy to a new Invoice Copy Invoice Transfer Document

Debtor

1	Name	Invoice No	<<New>>	6	Multi Pricing
4	Address	5	Date 27/08/2018	9	Credit Term
7		8	Branch	12	Sales Agent
10		11	Sales Location HQ	15	Shipping Info
13		14	Ship Via		

Customization

Hidden Items Layout Tree View

Enter text to search...

- Root
 - Master Information
 - Debtor**
 - Name
 - Invoice No
 - GST Branch ID
 - Address 1
 - Date
 - Multi Pricing
 - Address 2
 - Branch
 - Credit Term
 - Address 3
 - Sales Location
 - Sales Agent
 - Address 4
 - Ship Via

Enter text to search...

AppearanceItemCaption

- BackColor **LightSkyBlue**
- BackColor2 **255, 192, 192**
- BorderColor
- Font **Tahoma, 8pt**
- FontSizeDelta **0**
- FontStyleDelta **Regular**
- ForeColor **Black**
- GradientMode **Horizontal**
- HAlignment **Far**
- HotkeyPrefix **Show**
- Image **(none)**
- Trimming **Default**
- UseBackColor

TextSize
Gets or sets the size of the text region.

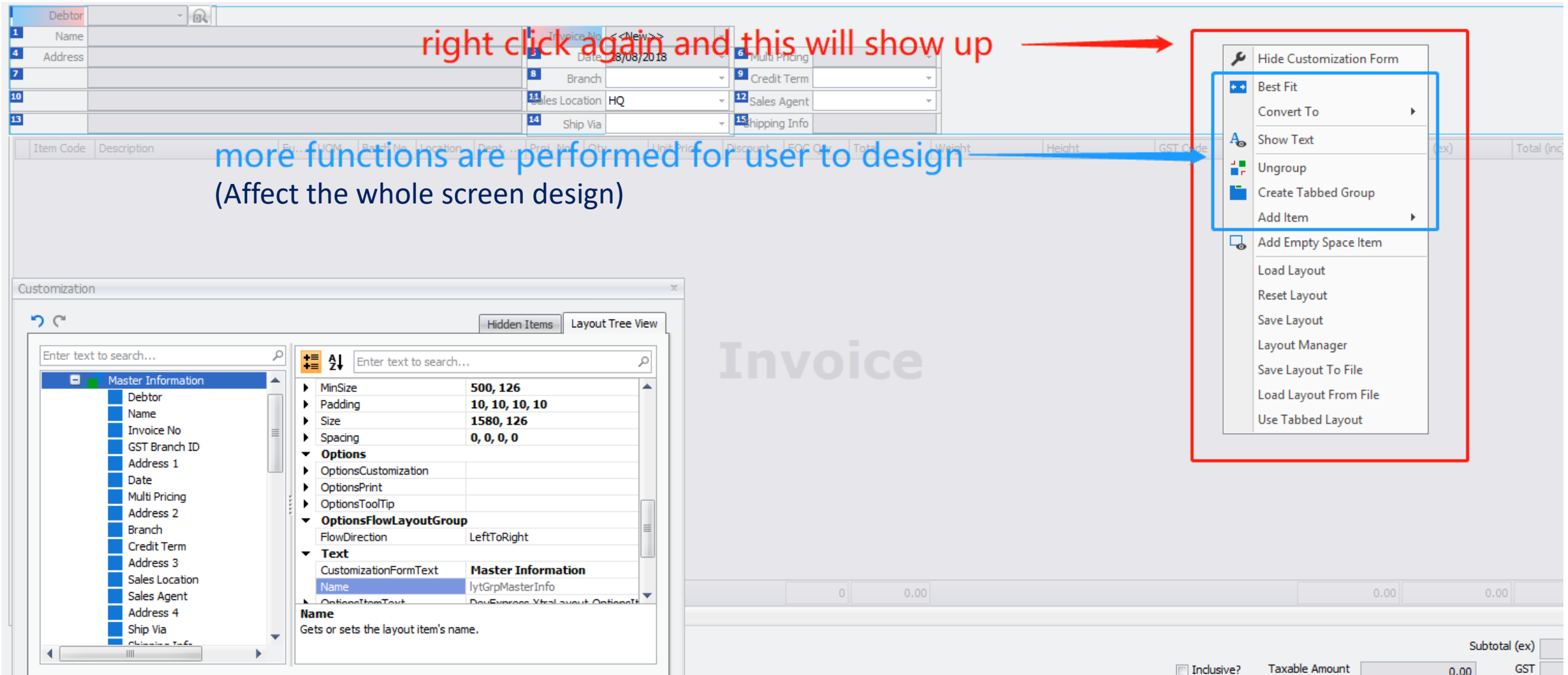
For example user can choose to design their own favourite colour to display, or change the front size they want.

		Subtotal (ex)	0.00
taxable Amount	0.00	GST	0.00
Local Total	0.00	Total	0.00

Save Save & Preview Save & Print Cancel

Sales Invoice: Design Layout

Other than customization function for detail items, user can also right click again for the whole layout design.



The screenshot displays the 'Sales Invoice' design layout interface. A right-click context menu is open over the 'Master Information' section, listing various design actions. A red arrow points from the text 'right click again and this will show up' to the context menu. A blue arrow points from the text 'more functions are performed for user to design (Affect the whole screen design)' to the 'Best Fit' option in the menu. The 'Customization' panel is visible in the bottom-left corner, showing a tree view of the layout items and their properties.

right click again and this will show up

more functions are performed for user to design
(Affect the whole screen design)

Invoice

Customization

- Hide Customization Form
- Best Fit
- Convert To
- Show Text
- Ungroup
- Create Tabbed Group
- Add Item
- Add Empty Space Item
- Load Layout
- Reset Layout
- Save Layout
- Layout Manager
- Save Layout To File
- Load Layout From File
- Use Tabbed Layout

Property	Value
MinSize	500, 126
Padding	10, 10, 10, 10
Size	1580, 126
Spacing	0, 0, 0, 0
Options	
OptionsCustomization	
OptionsPrint	
OptionsToolTip	
OptionsFlowLayoutGroup	
FlowDirection	LeftToRight
Text	
CustomizationFormText	Master Information
Name	lytGrpMasterInfo

Sales Invoice: Design Layout



2. Right click on the Item 1 to rename it to BILLING ADDRESS.

1. Drag out the Delivery Address to the empty space.

3. Click on Add Tab function if user wish to add some field (e.g Attention & Delivery Contact, Delivery Phone) into another column.

4. Finally it showed as below.

Customize layout can be flexible based on user requirement.

BILLING ADDRESS EXTRA INFO

Attention

Contact

Phone

Sales Invoice: Design Layout



Home Edit

Save as Draft Save as Template Save as Recurrence Save

Editing

Set GST Date Group Total Discount Item Package Change Unit Price Item Search Show Instant Info

Copy from other Invoice Copy to a new Invoice Copy Invoice Transfer Document

In Ver 2, the transaction layout is displayed in this regular layout (without tabbed).

Debtor Name Address

Invoice No <<New>> Date 28/08/2018 Branch Sales Location HQ Ship Via

Multi Pricing Credit Term Sales Agent Shipping Info

Ite...	Description	...	U...	Ba...	Lo...	D...	Pr...	Qty	Unit ...	Dis...	FO...	Total	Weight	Height	GST ...	GST ...	GST	Total (ex)	Total (inc)		
<h1>Invoice</h1>																					
								0				0	0.00						0.00	0.00	0.00

Record 0 of 0

Subtotal (ex) 0.00 GST 0.00 Total 0.00

Inclusive? Taxable Amount 0.00 Local Total 0.00


Currency MYR Rate 1.0000000

Proceed New Invoice Save Save & Preview Save & Print Cancel

Sales Invoice: Design Layout

- Customize Layout
- Load Layout
- Reset Layout
- Save Layout
- Layout Manager
- Save Layout To File
- Load Layout From File
- Use Tabbed Layout**

- For those users who already get used to previous AutoCount Accounting Version (e.g V1.8 & 1.9), they can choose the 'Use Tabbed Layout' function.
- Right click on the transaction layout, click on Use Tabbed Layout.

Debtor 

Name

Address

Invoice No <<New>>

Date 28/08/2018

Branch

Sales Location HQ

Credit Term

Sales Agent

Ship No

Shipping Info

Tabbed Layout

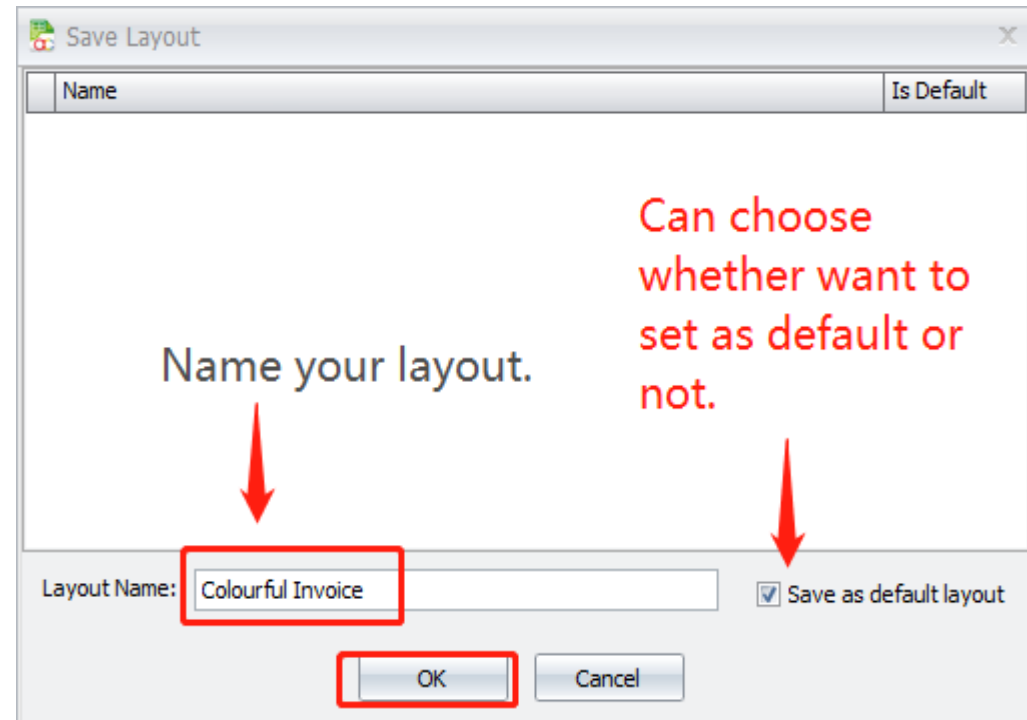
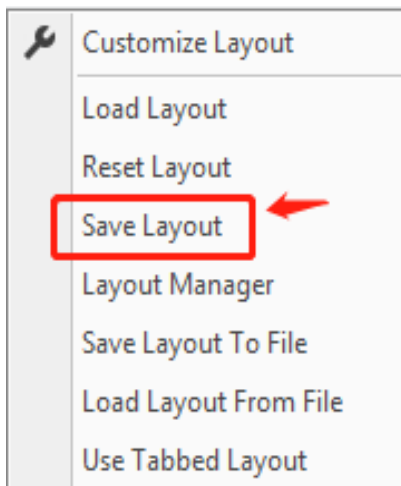
Item Code	Description	Fu...	UOM	Batch No.	Location	Dept. ...	Proj. No.	Qty	Unit Price	Discount	FOC Qty	Total	Weight	Height	GST Code	GST Rate	GST	Total (ex)	Total (inc)
Invoice																			

0 0 0.00 0.00 0.00 0.00

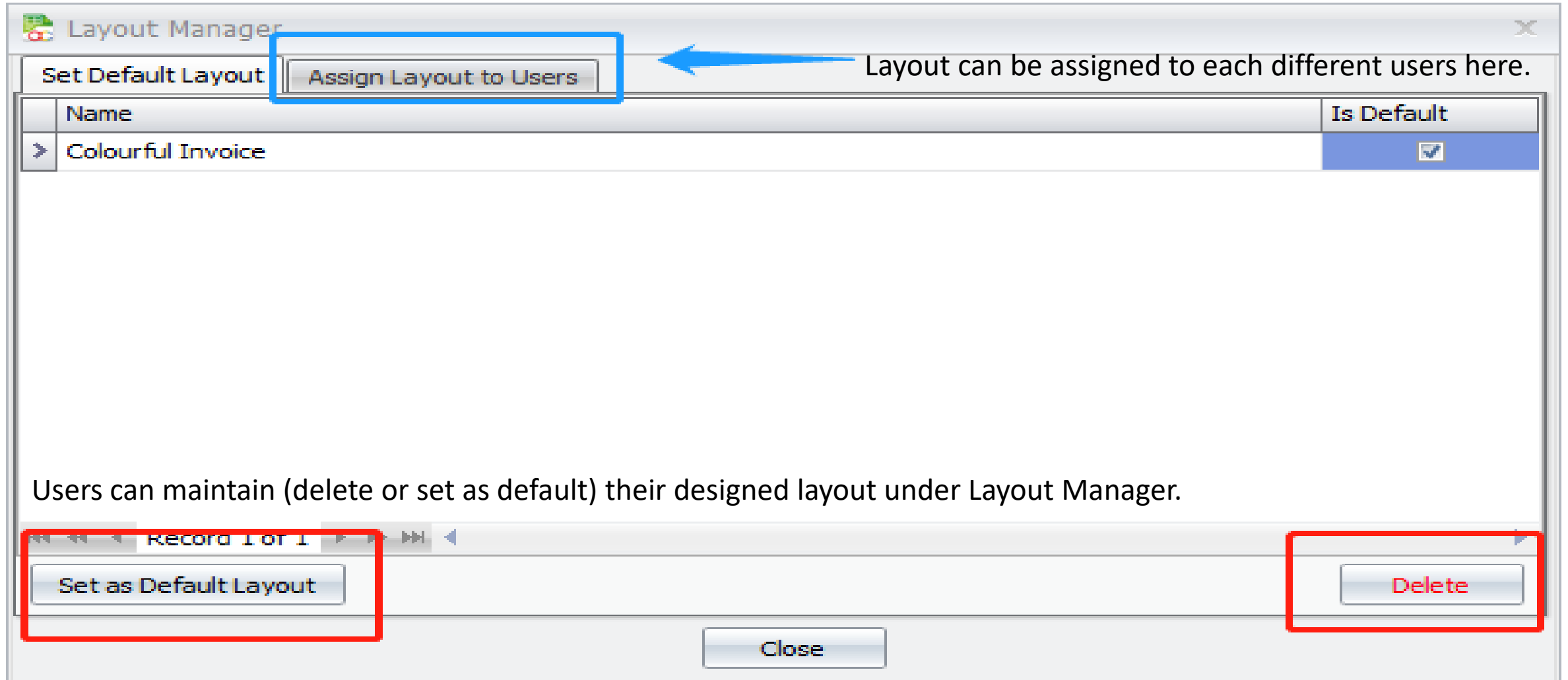
Record 0 of 0

Sales Invoice: Design Layout

- The function for Load, Reset, Save Layout and Layout Manager in v2 is same as v1.8 & v1.9.
- Click on Save Layout to name and save the current designed layout, users can choose to set it to be default layout also.
- If users want to use back system default layout, they can click on Reset Layout.
- The layout saved before will be stored in the database. Users can design as many as they wanted and click on the Load Layout to load any layouts that were saved before.



Sales Invoice: Design Layout



Layout Manager

Set Default Layout | **Assign Layout to Users**

Layout can be assigned to each different users here.

Name	Is Default
> Colourful Invoice	<input checked="" type="checkbox"/>

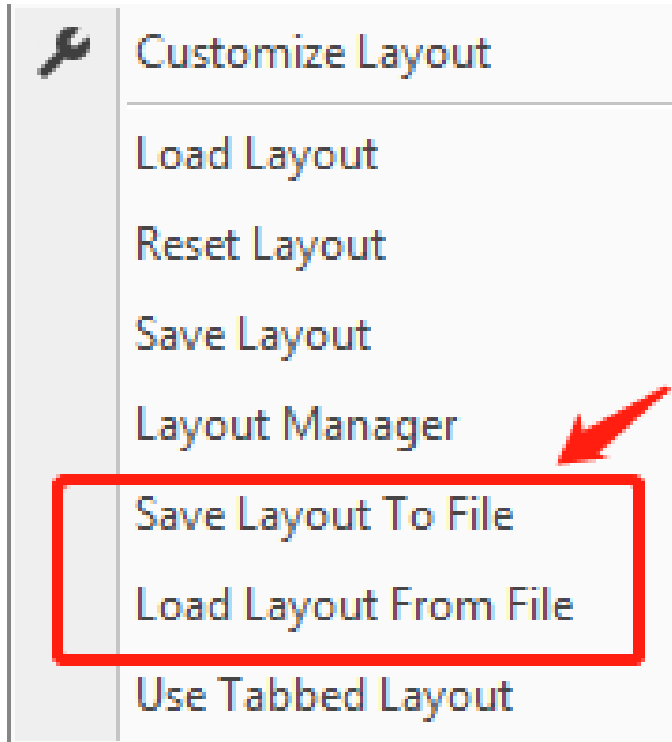
Record 1 of 1

Set as Default Layout | **Delete**

Close

Users can maintain (delete or set as default) their designed layout under Layout Manager.

Sales Invoice: Design Layout



For Layout Customization, Autocount Accounting V2 added in 'Save Layout To File' and 'Load Layout from File' like what users can do for report design.

Users can save any layout their designed and load into another account book if they want.

Thank You

A c c o u n t | B i l l i n g | S t o c k | P O S | P a y r o l l



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