



How Do I Make Different Default Layouts For Users Or BPs?

1. Open up the A/R Invoice window, then open the Layout Designer Window using Tools > Layout Designer or the icon just to the left of the Form Settings icon:

The screenshot shows the A/R Invoice window with the Layout Designer window open. The A/R Invoice window has a title bar "A/R Invoice" and a "Layout Designer..." button. The form contains the following fields:

Customer Code		No.	Primary	10179
Customer Name		Status		Open
Contact Person		Posting Date		10-18-17
Customer Ref. No.		Due Date		

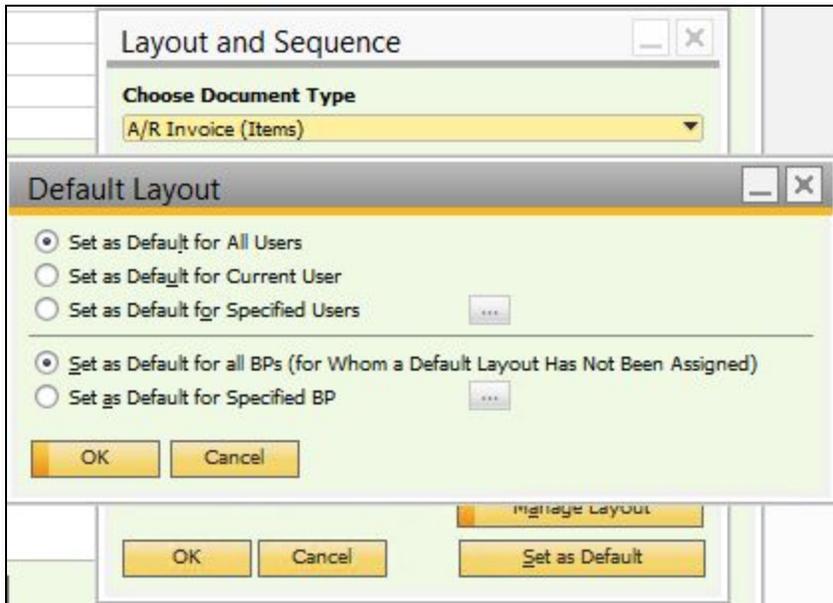
2. Find/highlight the layout you'd like to make default:

The screenshot shows the "Layout and Sequence" dialog box. It has a title bar "Layout and Sequence" and a "Choose Document Type" dropdown menu set to "A/R Invoice (Items)". Below the dropdown is a table with the following data:

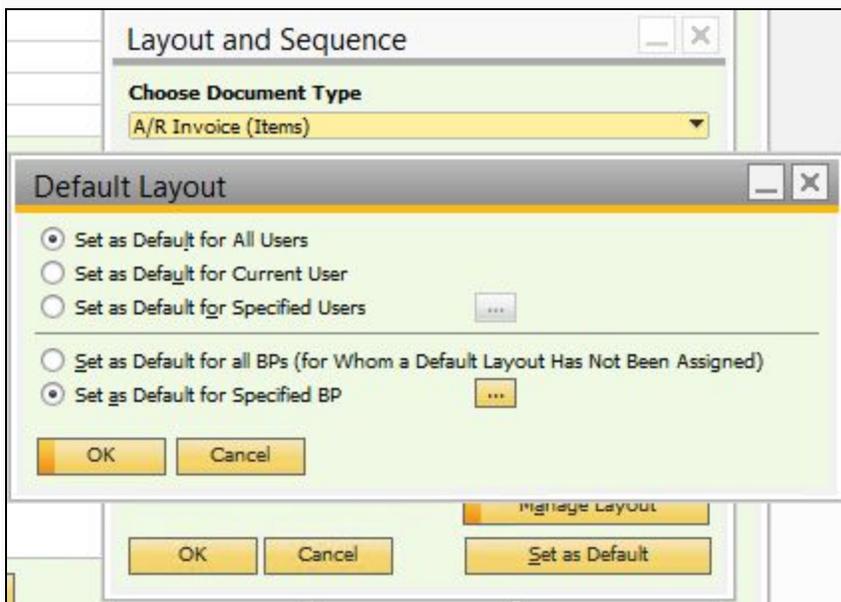
#	Layout	Type
1	A/R Invoice (Item) - CR (US) (System)	Layout - CR
2	CCC - Orchestrated Marketing Layout	Layout - CR
3	Invoice (EHP) (System)	Layout - PLD
4	Invoice Blank Stock_USA (System)	Layout - PLD
5	Invoice Including Batch/SN (System)	Layout - PLD
6	Invoice Preprinted (System)	Layout - PLD
7	Invoice with Advice (EHP) (System)	Layout - PLD

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Set as Default".

3. Click the "Set as Default" button in the bottom right and this window will pop up:



4. Choose which users will have this new default (all users, just the user who is currently logged in, or you can specify which users). Also, choose which BPs will get this default (either all or selected BPs). In this example, I'm going to make it default for all users, but specify which BPs:



5. After selecting the last radio button and then clicking the ellipses button ("..."), two new windows pop up with the top window giving you the ability to filter out which BPs to pull in.



The screenshot shows the 'Business Partners - Selection Criteria' dialog box. A sub-dialog titled 'BP Properties' is open in the foreground. The sub-dialog has the following fields and controls:

- Code:** A text field with 'From' and 'To' labels and a search icon.
- Customer Group:** A dropdown menu set to 'All'.
- Vendor Group:** A dropdown menu set to 'All'.
- Properties:** A button labeled 'Properties' and a text field containing 'Ignore'.
- Buttons:** 'OK', 'Cancel', 'Select All', 'Clear', and 'Add' buttons are visible at the bottom of the sub-dialog.

The background dialog box shows a table with columns for '#', 'BP Code', and 'BP Name'. It also has 'OK', 'Cancel', 'Select All', 'Clear', and 'Add' buttons at the bottom.

6. You can filter by code, BP group, or properties. Or you can leave these blank and hit "OK" to pull in all of the BPs on to the window behind it:

The screenshot shows the 'Business Partners - Selection Criteria' dialog box with a list of business partners. The table has columns for '#', 'BP Code', and 'BP Name'. Each row has a checkbox in the right margin.

#	BP Code	BP Name	
1	C1000	Tap Room	<input type="checkbox"/>
2	C1001	AMOSKEAG BEVERAGES, LLC.	<input type="checkbox"/>
3	C1002	ATLAS	<input type="checkbox"/>
4	C1003	BAD MARTHA	<input type="checkbox"/>
5	C1004	BEECHWOOD	<input type="checkbox"/>
6	C1005	BERKSHIRE	<input type="checkbox"/>
7	C1006	C. R. McNEILL	<input type="checkbox"/>
8	C1007	CAMBRIDGE	<input type="checkbox"/>
9	C1008	CLOWN SHOES/PIPELINE DIST	<input type="checkbox"/>
10	C1009	CRAFT CA	<input type="checkbox"/>
11	C1010	CRAFT CT	<input type="checkbox"/>
12	C1011	CRAFT MA	<input type="checkbox"/>
13	C1012	CRAFT ME	<input type="checkbox"/>
14	C1013	CRAFT NH	<input type="checkbox"/>
15	C1014	CRAFT NY	<input type="checkbox"/>

Buttons at the bottom: 'OK', 'Cancel', 'Clear', and 'Add'.

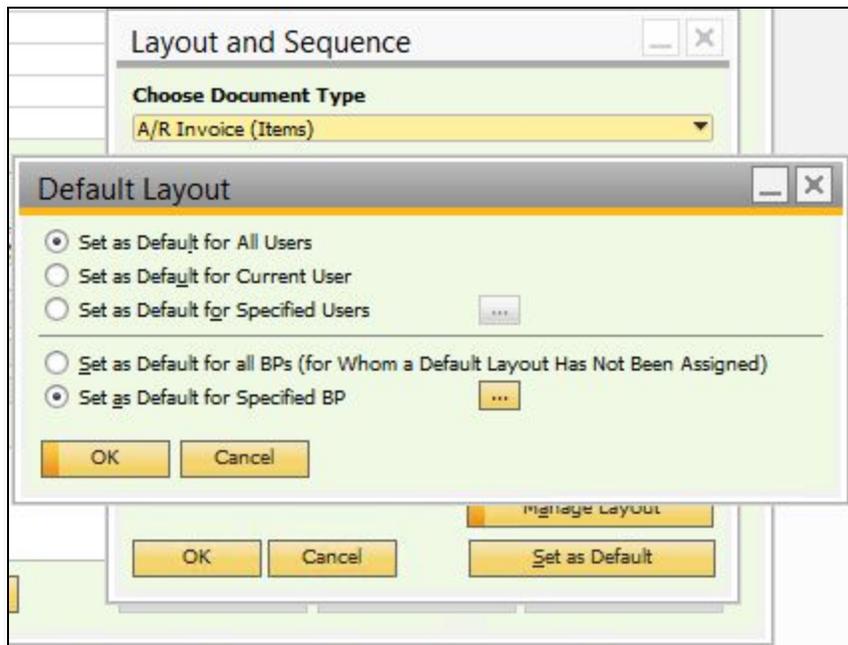


7. In this case all BPs display and I can scroll through (after double clicking "BP Name" to sort) and just toggle the BPs I want to use (this shows just Beechwood but I scrolled down and selected Legends as well):

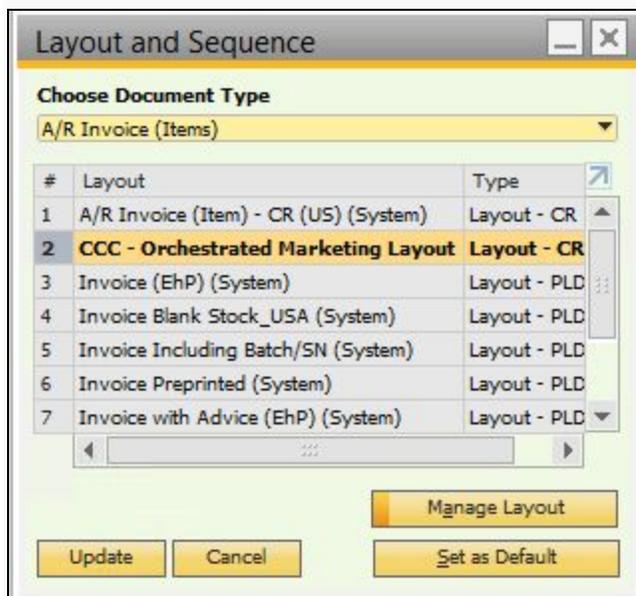
#	BP Code	BP Name	
53	➔ V1045	B & C Cryotech Services, Inc.	<input type="checkbox"/>
54	➔ V1046	B&C CRYOTECH SERVICES, INC.	<input type="checkbox"/>
55	➔ C1003	BAD MARTHA	<input type="checkbox"/>
56	➔ V1047	BALDINO, AMANDA	<input type="checkbox"/>
57	➔ V1048	BANK OF AMERICA	<input type="checkbox"/>
58	➔ C1004	BEECHWOOD	<input checked="" type="checkbox"/>
59	➔ V1049	BEERADVOCATE.COM, INC.	<input type="checkbox"/>
60	➔ V1050	BEME Water System Solutions, Inc.	<input type="checkbox"/>
61	➔ C1005	BERKSHIRE	<input type="checkbox"/>
62	➔ V1051	BEVCORP LLC	<input type="checkbox"/>
63	➔ V1052	BHA ALTAIR, LLC	<input type="checkbox"/>
64	➔ V1053	BIA DIAGNOSTICS	<input type="checkbox"/>
65	➔ V1054	BIG Y FOODS, INC.	<input type="checkbox"/>
66	➔ V1055	BIO CHEM	<input type="checkbox"/>
67	➔ V1056	BLACK BEAR COATINGS & CONCRETE	<input type="checkbox"/>
68	➔ V1057	BLANCHARD, MARK	<input type="checkbox"/>

Buttons: Update, Cancel, Clear, Add

8. Click "Update" and you'll return to the previous window which you can click OK to close:



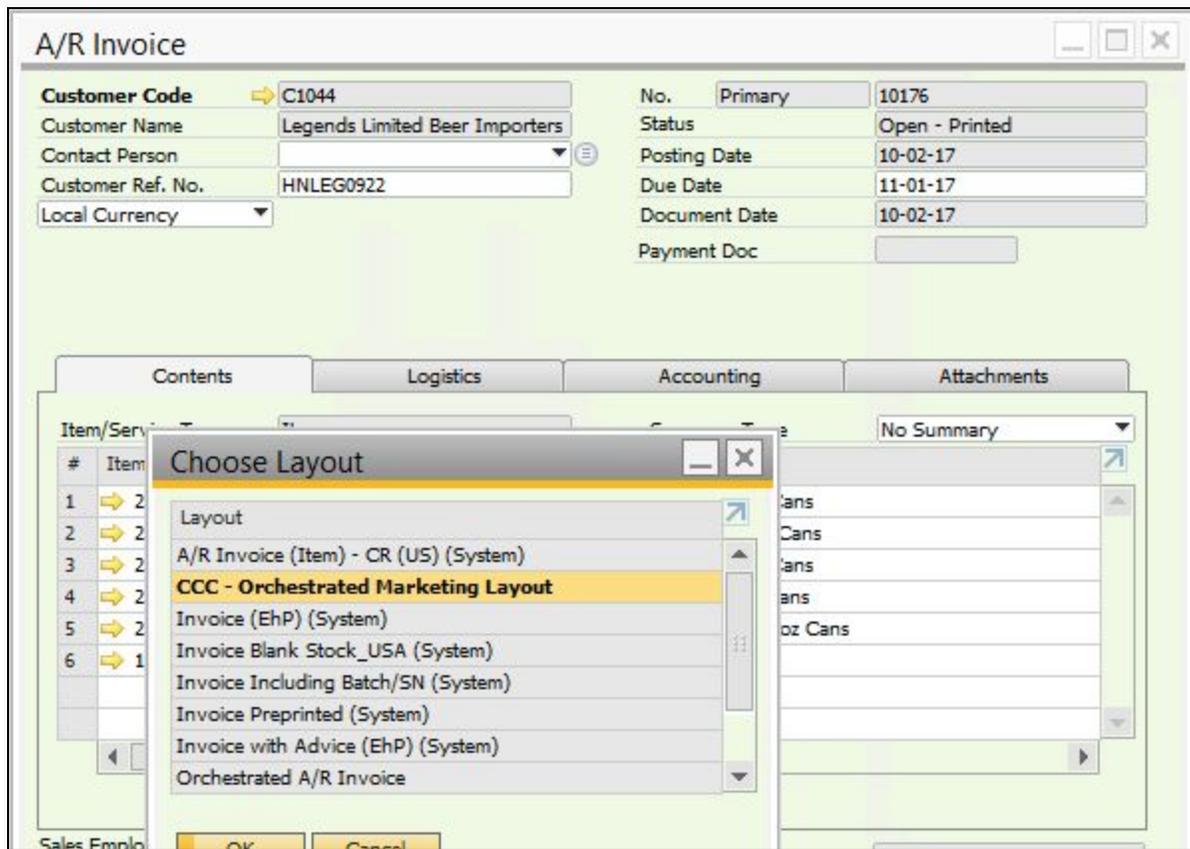
9. Then click "Update" on the Layout and Sequence window to finalize the changes and then "OK" to close the window entirely:



Do not forget to click Update or it will all be for nothing!



10. To double check/confirm, we can pull up invoices for Legends and go to "Preview Layouts" (or just File > Preview) and compare that to a BP that wasn't changed:



For the BP that we haven't changed, you'll see the old default still remains:



A/R Invoice [Window Title]

Customer Code C1007 **No.** Primary 10178
Customer Name CAMBRIDGE **Status** Open - Printed
Contact Person Phil **Posting Date** 10-17-17
Customer Ref. No. **Due Date** 10-24-17
Local Currency **Document Date** 10-17-17
Payment Doc

Contents Logistics Accounting Attachments

Item/Service No Summary

#	Item	
1	R	
2	R	

Sales Emplo

Choose Layout [Dialog Title]

Layout

- Invoice (EhP) (System)
- Invoice Blank Stock_USA (System)
- Invoice Including Batch/SN (System)
- Invoice Preprinted (System)
- Invoice with Advice (EhP) (System)
- Orchestrated A/R Invoice
- Orchestrated Marketing Layout - NO SHIP TO
- Orchestrated Marketing Layout**

OK Cancel

Account € 1,220.00