SAGE BUSINESS CLOUD ACCOUNTING

ACCOUNTING CUSTOM LAYOUT DESIGNER

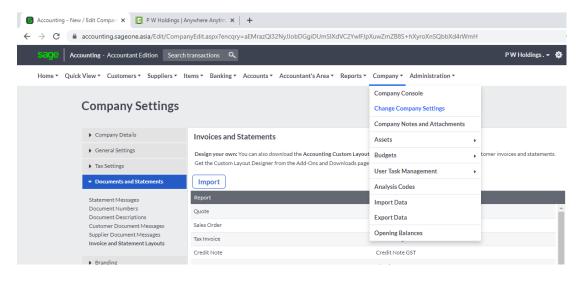
Accounting Custom Layout Designer

Customize your invoice and statement layouts using the Custom Layout Designer The Custom Layout Designer allows you to customise the following:

- Customer Documents
- Customer Statements
- Supplier Documents
- Supplier Statements

Download the Accounting Custom Layout Designer

Company, Change Company Settings, Document and Statements, Invoice and Statement Layouts

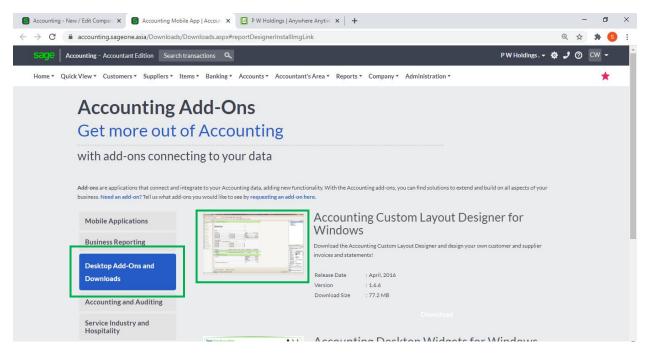


ccounting - New / Edit Compa	P W Holdings A	nywhere Anytim 🗙 🕇 🕂			-	٥	
→ C accounting.	sageone.asia/Edit/Compar	nyEdit.aspx?encqry=aEMrazQI32NyJJobDGgiI	DUmSIXdVC2YwIFJpXuwZmZB8S+hXyroXnSQbbXd4rWmH	Ð	☆	* 6)
Cage Accounting - Ac	countant Edition Search		PWH	loldings 🏘 🤳	0	cw 🚽	
Home ▼ Quick View ▼ Cu	stomers • Suppliers • It	ems • Banking • Accounts • Accountant's	s Area ▼ Reports ▼ Company ▼ Administration ▼			*	
Comp	any Settings						
► Compar	ıy Details	Invoices and Statements					
► General	Settings	Design your own: You can also download the Acco	ounting Custom Layout Designer for Windows to design your own customer invoices ar	nd statements.			
▶ Tax Sett	ings	Get the Custom Layout Designer from the Add-Ons and Downloads page or by Clicking here.					
- Docume	ents and Statements	Import					
Statement	Messages	Report	Layout				
Document	Numbers Descriptions	Quote	Classic GST	A			
Customer	Document Messages	Sales Order	Default (Modern)				
	ocument Messages d Statement Layouts	Tax Invoice	PWHoldings				
		Credit Note	Credit Note GST				
Brandin	g	Customer Statement	Classic GST				
User De	fined Fields	Delivery Note	DeliveryOrder				
Email Si	gnatures	Purchase Order	Classic GST				
Multi-C	urrency	Supplier Invoice	Classic GST				

Click on "clicking here" for download the Accounting Custom Layout Designer

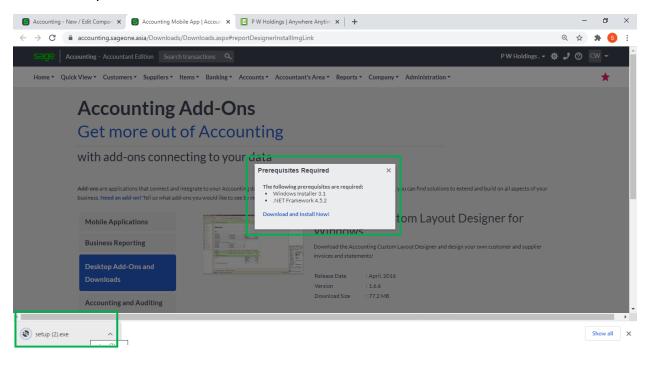
Select "Desktop Add-Ons and Downloads"

Click on "Accounting Custom Layout Designer for Windows"



Click on "Download and Install Now"

Run the setup after download





Double click on Accounting Custom Layout Designer icon

Enter Username (email address) and Password

Image: Control and Contr	Accounting - Custom Layout Designer Version 1.8.0		-	٥	\times
I 魚目目の目目を提展中決決決らる記述公司回転後×II ペーペペ× ToolBox → X	File Edit View Format				~
Tool Box * X	- B	$I \ \underline{\mathbb{U}} \ \underline{\mathbb{A}} \star \underline{\mathbb{B}} \star \equiv \equiv \equiv \equiv \bullet$			
Tool Box * X		왕 왕 속 (팬 맨) 및 및 및 · · · · · · · · · · · · · · · ·			
	Tool Box 🕴 🗙		Report Explorer	•	a x
Username Image: Concel Personname Image: Concel Sage: Accounting Image: Concel Image: Concel		OK Cancel	Property Grid		

Select the relevant layout category

S Acco	ounting - Custom Layout Designer	×								
	ounting Custom Layout Designer is used to create your own r and supplier invoice and statement layouts.									
Choose t the layou	the type of layout to customize, make your changes and save .t.									
	ou have different layouts for each company, include the y name in the name of your layout.									
Invoice a Statemer	our customized layout, log into your company, select the and Statement Layouts option under Documents and nts tab in Company Settings and select the layout for the document.									
Layout:	[Please Select a Custom Layout]	•								
Nam	Name									
	Quotes / Sales Orders / Tax Invoices / Credit Notes Customer Statements Purchase Orders / Supplier Invoices / Supplier Returns Supplier Statements Delivery Note									
	x	//.								
Impo	Design Delete Close									

Select the layout and click on "Design"

	e Accounting Custom Layout Designer is used to create your own	
	istomer and supplier invoice and statement layouts. noose the type of layout to customize, make your changes and save	
	e layout.	
	p: If you have different layouts for each company, include the mpany name in the name of your layout.	
Inv Sti	use your customized layout, log into your company, select the voice and Statement Layouts option under Documents and atements tab in Company Settings and select the layout for the evant document.	
La	yout: Quotes / Sales Orders / Tax Invoices / Credit Notes	,
_		
	Name	Τ
•	Name Default (Classic)	
•		
•	Default (Classic)	
•	Default (Classic) Default (Modern)	
•	Default (Classic) Default (Modern) Default (Plain)	
•	Default (Classic) Default (Modern) Default (Plain) Allied	
•	Default (Classic) Default (Modern) Default (Plain) Allied Annake 3	
•	Default (Classic) Default (Modern) Default (Plain) Allied Annake 3 Annake 1	
•	Default (Classic) Default (Modern) Default (Plain) Allied Annake 3 Annake 1 Annake 1.1	
•	Default (Classic) Default (Modern) Default (Plain) Allied Annake 3 Annake 1 Annake 1.1 Annake 2.	

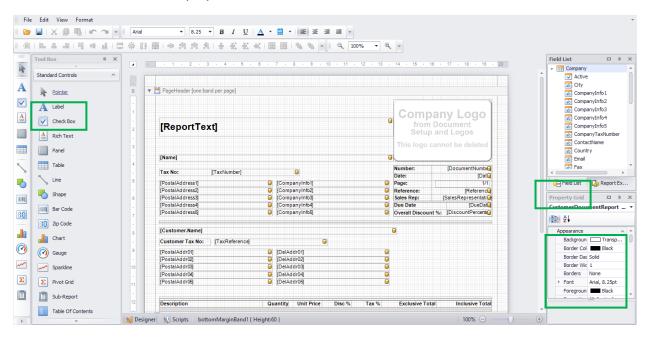
Inserting a logo or picture

In Accounting, you upload your Company Logo in the Company Settings section. Do not delete the picture box on your layouts.



Accounting automatically links your selected logo in the Branding tab in the Company Settings section to this picture box.

Click on "Field List" to display Data Fields.



Repositioning your fields

To reposition your fields on your layout, highlight the box and drag it to the new position.

Deleting Fields

To delete a field, highlight the box and press the delete button on your keyboard or right click and select the delete option from the menu.

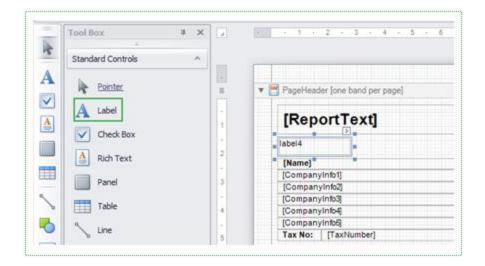
[Name]		2
[CompanyInfo1]		
[CompanyInfo2]	Bring To Front	-
[CompanyInfo3]	🔄 🖶 🛛 Send To Back	
[CompanyInfo4]		
[CompanyInfo5]	Align To <u>G</u> rid	
Tax No: [TaxNumber	Cut	
[Customer.Name]	🗗 Сору	
[DelAddr01]	Easte	
[DelAddr02]	X Delete	
[DelAddr03]		_
[DelAddr04]	Insert Band	· •
[DelAddr05]	Insert Detail Repo	rt >
Customer Tax No:	ax Zoom	•
Description	Properties	

Copying Fields

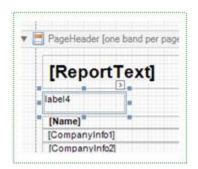
To copy a field, highlight the box, right click and select the copy option from the menu.

Inserting a new field

To insert a new field on your layout, select the Label option from the Standard Controls Tool Box.



Drag and drop the Label onto the layout. Double click on the label to edit the text.

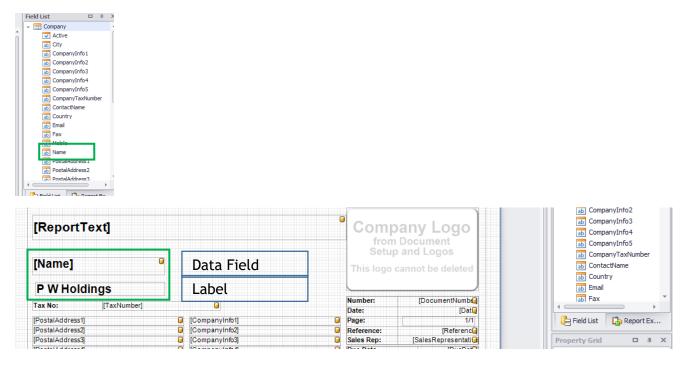


Changing your font

To change your font properties, highlight the text box that you want to change. Use the toolbar at the right of the screen to assist you in changing the font type, size, style, colour and position.

Data fields get values from the system. Data labels not contain values and you can include any value to a Label.

Eg: if you want include your company name to the layout, you can use "Name" data filed under Company or you can rename Label value.



Saving your layout

After you have customised your document, go to the File menu and select the option Save as.

Enter a unique name in the Report Name field and click on OK.

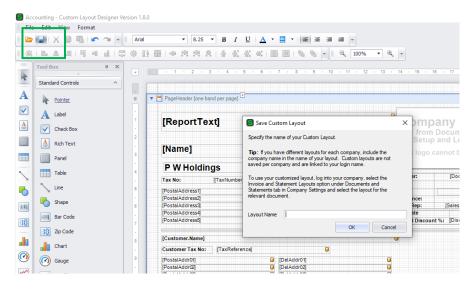
Your layout will now be saved.

You can change your customised layout in the Invoice and Statement section under the Documents and Statements tab under your Company Settings.

The Custom Layout Designer will also allow you to export your layout and import it into Accounting.

Enter Layout Name.

Eg: If you want to create two layouts for Tax customers and Non-Tax customers, rename the layout "Tax Invoice" for Tax layout and rename the layout "Invoice" for Non-Tax layout



After designed the layout you can set layout in following screens.

1. Set the layout as Default layout (if you set a layout in default layout section, when you create a new customer attached layout will display as default layout.)

Accounting - New / Edit Company ×	P W Holdings Ar	nywhere Anytim 🗙 📔 🕂			-	đ			
← → C 🔒 accounting.sage	one.asia/Edit/Compar	nyEdit.aspx?encqry=aEMrazQl32NyJJobDGgiDUmSlXdVC2YwlFJpX	uwZmZB8S+hXyroXnSQbbXd4rWmH		@ ☆	* 🜖			
Sage Accounting - Account	tant Edition Search t	ransactions Q		P W Holdings . 👻 🏟	♪ @	cw 🗕			
Home * Quick View * Custom	ers▼ Suppliers▼ Ite	ems * Banking * Accounts * Accountant's Area * Reports *	Company Administration			*			
Company	y Settings								
Company Det	ails	Invoices and Statements							
▶ General Settin	ngs	Design your own: You can also download the Accounting Custom Layout Designer for Windows to design your own customer invoices and statements.							
► Tax Settings		Get the Custom Layout Designer from the Add-Ons and Downloads page or by clicking here.							
➡ Documents an	nd Statements	Import							
Statement Mess	Statement Messages Document Numbers Document Descriptions Customer Document Messages Supplier Document Messages Invoice and Statement Layouts	Report	Layout						
		Quote	Classic GST	^					
Customer Docur		Sales Order	Default (Modern)						
		Tax Invoice	PWHoldings	•					
	,	Credit Note	Tekzol Invoice	^					
Branding		Customer Statement	Tekzol Quotation SVAT						
User Defined	Fields	Delivery Note	Allied						
Email Signatur	res	Purchase Order	PWHoldings						
Multi-Current	cy	Supplier Invoice	PTM InvoiceDD						
		Supplier Return	molebb	*					
				*					

2. Set the layout for Customers (if you want to change the default layout for a customer, click on Report Layouts tab and change the layout)

🕒 Accounting - New Customer 🛛 X 🔽 P W Holdings Anywhere Anytim X +								\times
← → C 🖬 accounting.sageone.asia/Edit/CustomerEdit.aspx?encqry=iQgYGx7bXJPBHPASPH04zKXrvoasccQ8rKy16feNHpol=								:
Sage Accounting -								-
Home * Quick View * Customers * Suppliers * Items * Banki			*					
								-1
New Customer								
Record Navigation: 🗐 🖌 🕨								
Customer Name		Active	V					
Category		Credit Limit		LKR 0.00				
Cash Sale Customer		Tax Reference						
Opening Balance	LKR 0.00	Sales Rep	(None)	•				
Opening Balance as At	02/11/2020 🛗							
Auto Allocate Receipts to Oldest Invoice		Exclude from Debtors Manager	New I	nvoices On Hold	1			
 Notes User 	Defined Fields Personal Information	Sales Graph Quotes Sa	ales Orders Invoices	Report Layouts	*			
Report		Layout						
Quote		Classic GST		-	*			
Sales Order		Default (Modern)						
Tax Invoice		PWHoldings		•				
Credit Note		Tekzol Invoice		*				
Customer Statement		Tekzol Quotation SVAT						
Delivery Note		Allied						
		PWHoldings						
		PTM		-				

3. Change the layout when transaction processing time (if you want to change a default layout when processing transaction, click on Layout dropdown menu and select the layout)

Accounting - Process Customer T 🗙 🚺 P W I	Holdings Anywhere Anytim	× +						- 0	×
🗧 🔶 C 👔 accounting.sageone.asia/Process/TaxInvoiceProcess.aspx?encqry=A0gB/Lpm1Uck/7nR9PVPrHF4oonbPNv+UDBo2gWnlHwer8covAotZkcQdvUimOxsWwqePp0wryLyGalsAcV								* 6	:
Sage Accounting - Accountant Edition Search transactions Q PW Holdings 🌣 🧳								• cw •	^
Home * Quick View * Customers * Suppliers * Items * Banking * Accounts * Accountant's Area * Reports * Company * Administration *								*	. 1
Send * Options * Add Time Entries *									
Customer Detail	s			Delivery Addre	ess Po	ostal Address			
Customer	(None)	Tax Reference		Delivery Address	•]				
Balance	LKR 0.00	Credit Limit	LKR 0.00						- 1
Invoice Details									
Document No.	*NUMBER*	Date	02/11/2020 🛗						
Customer Ref.		Due Date	02/11/2020 🛗						
From Quote / Sales Order	•	Discount %	0.00 %						
Layout Sales Rep Use Inclusive Amoun	<mark>₽₩Holding:</mark> Allied PWHoldings PTM InvoiceDD								
	DDAL	↓ Qty Exd.	. Price Tax Type		xclusive Tax	Total			
item <u>Select</u>				0.00%		• •			
Item Select	uem			0.00%		🤍 🤤			*