SAGE BUSINESS CLOUD ACCOUNTING

ACCOUNTING CUSTOM LAYOUT DESIGNER

Accounting Custom Layout Designer

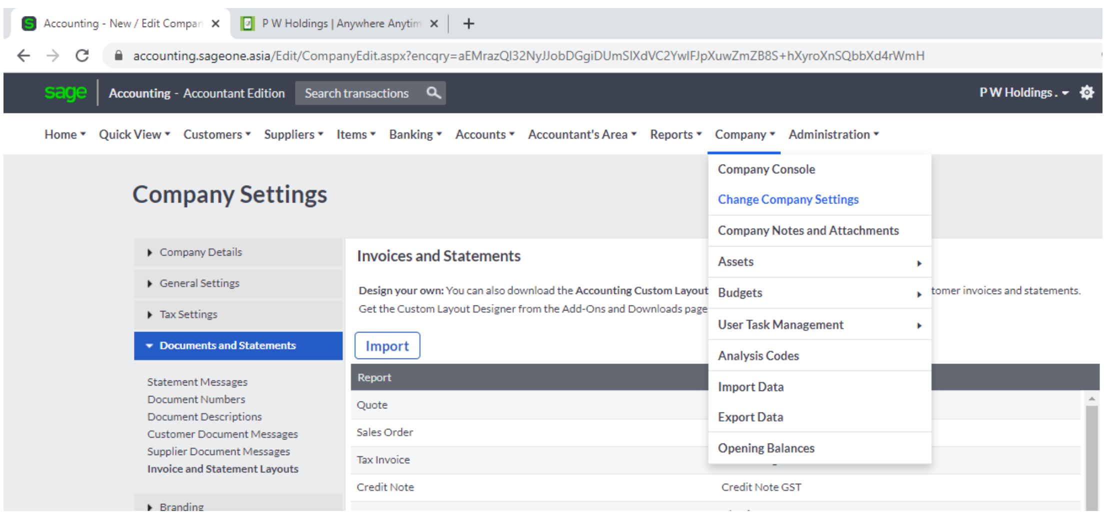
Customize your invoice and statement layouts using the Custom Layout Designer

The Custom Layout Designer allows you to customise the following:

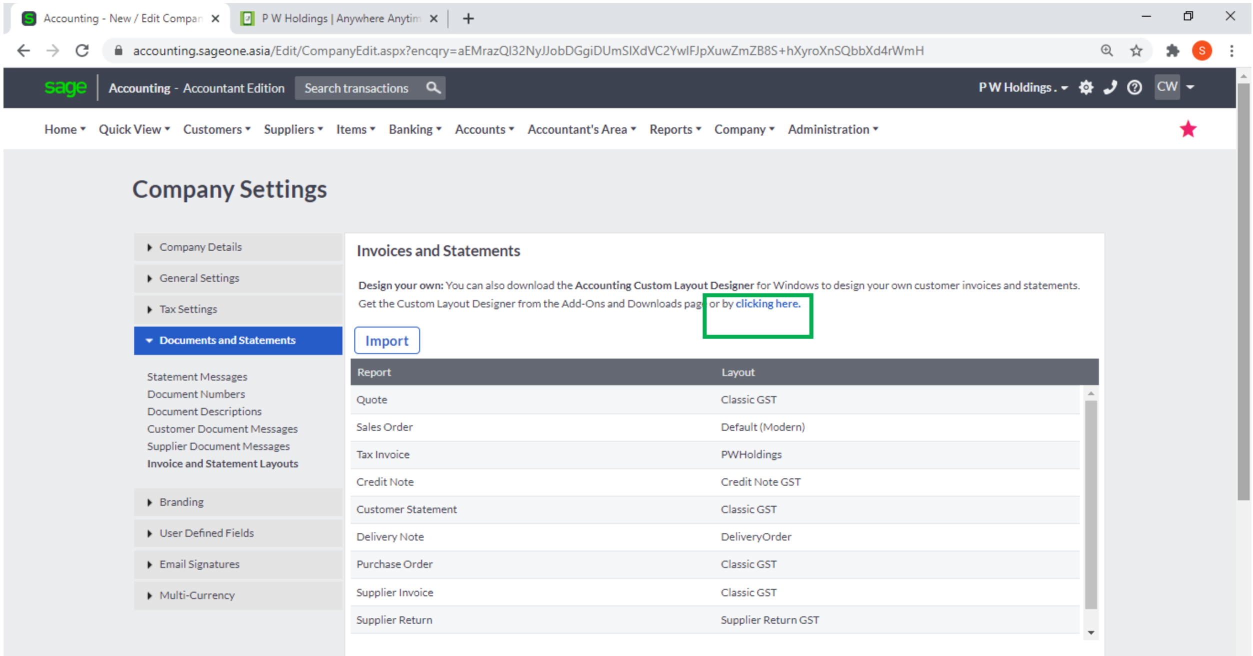
- Customer Documents
- Customer Statements
- Supplier Documents
- Supplier Statements

Download the Accounting Custom Layout Designer

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

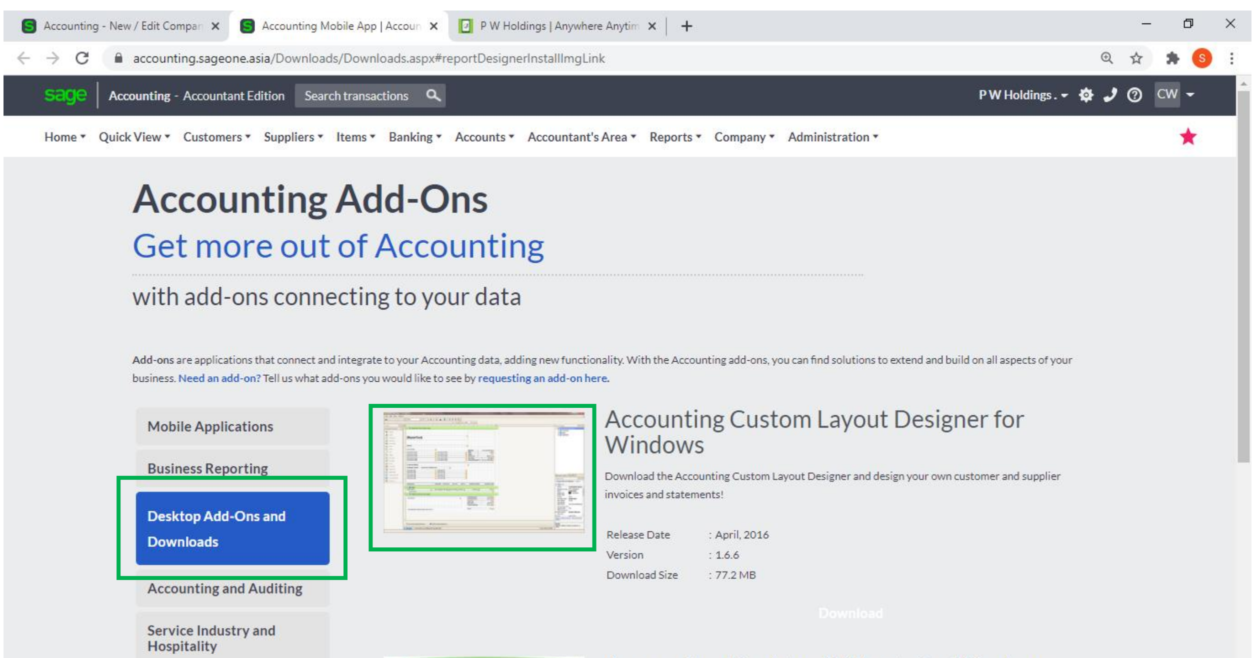


Click on “clicking here” for download the Accounting Custom Layout Designer



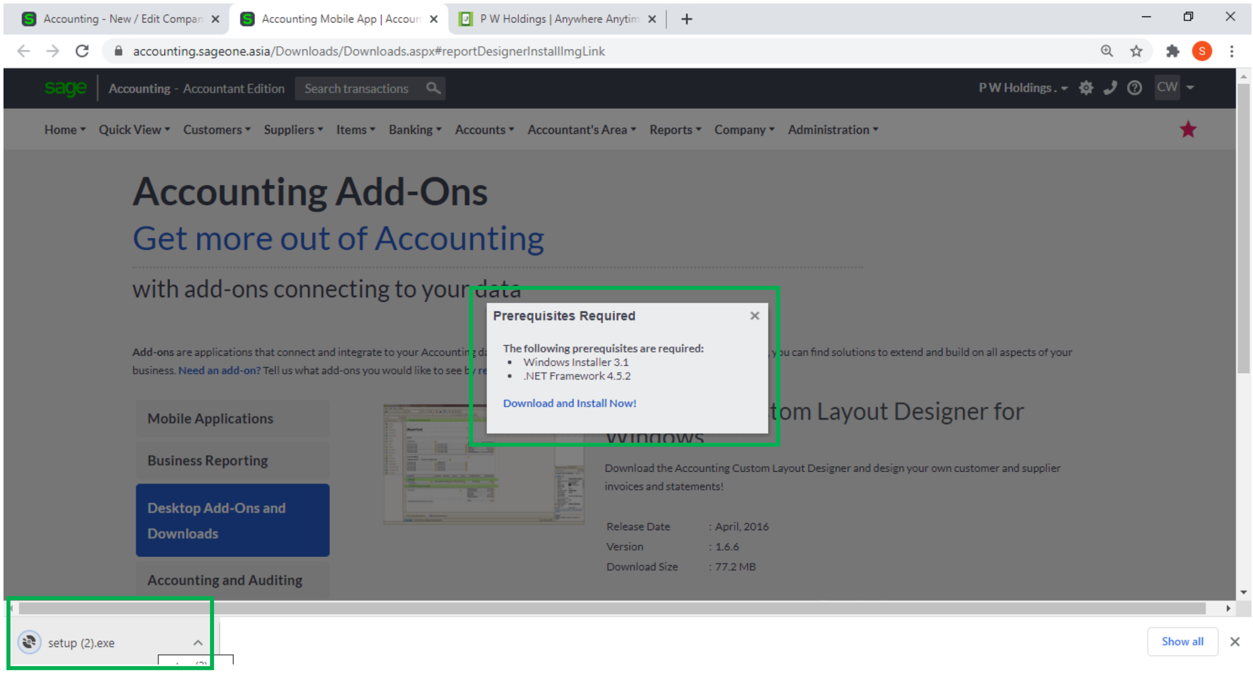
Select “Desktop Add-Ons and Downloads”

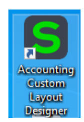
Click on “Accounting Custom Layout Designer for Windows”



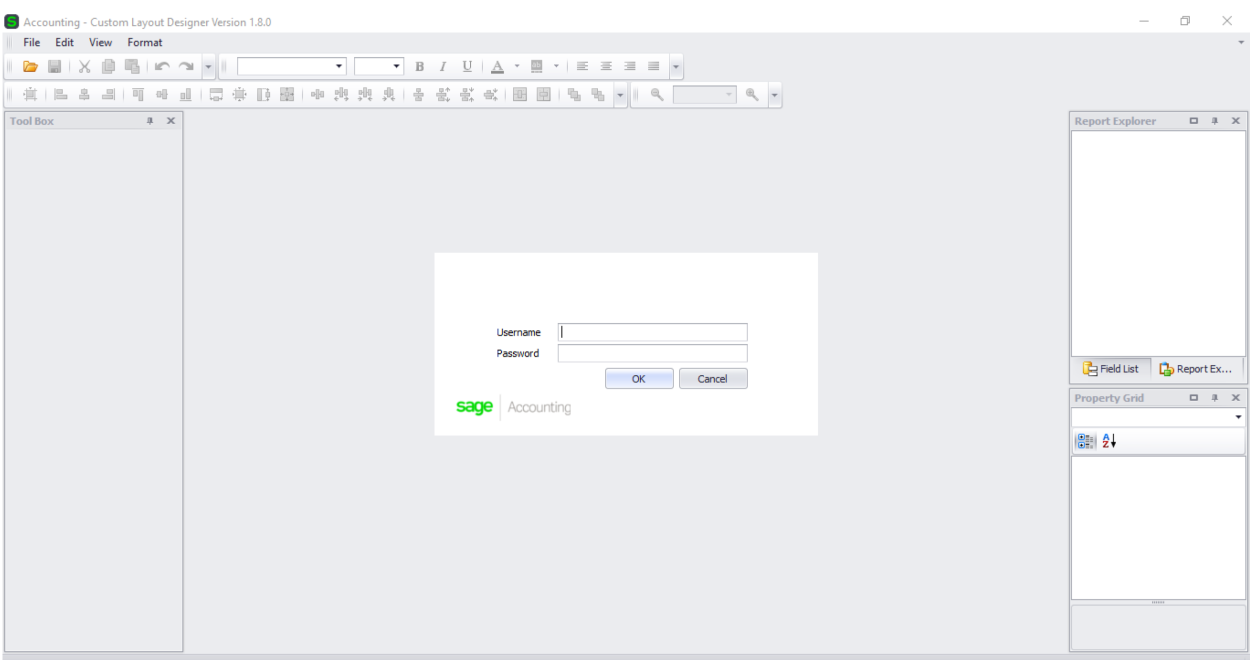
Click on “Download and Install Now”

Run the setup after download

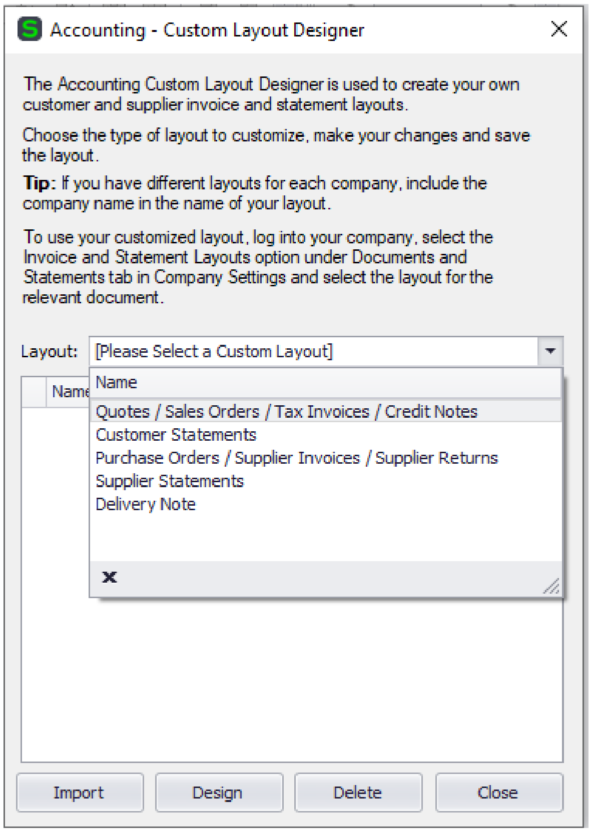


Double click on Accounting Custom Layout Designer icon 

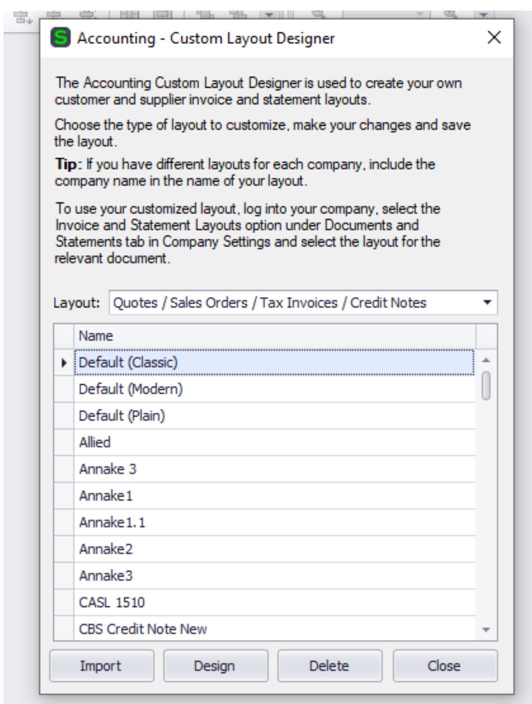
Enter Username (email address) and Password



Select the relevant layout category

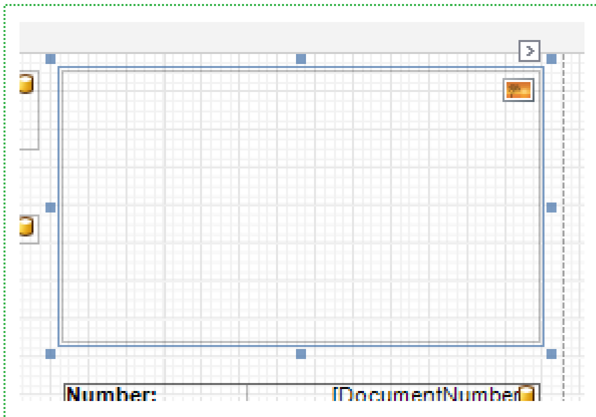


Select the layout and click on “Design”



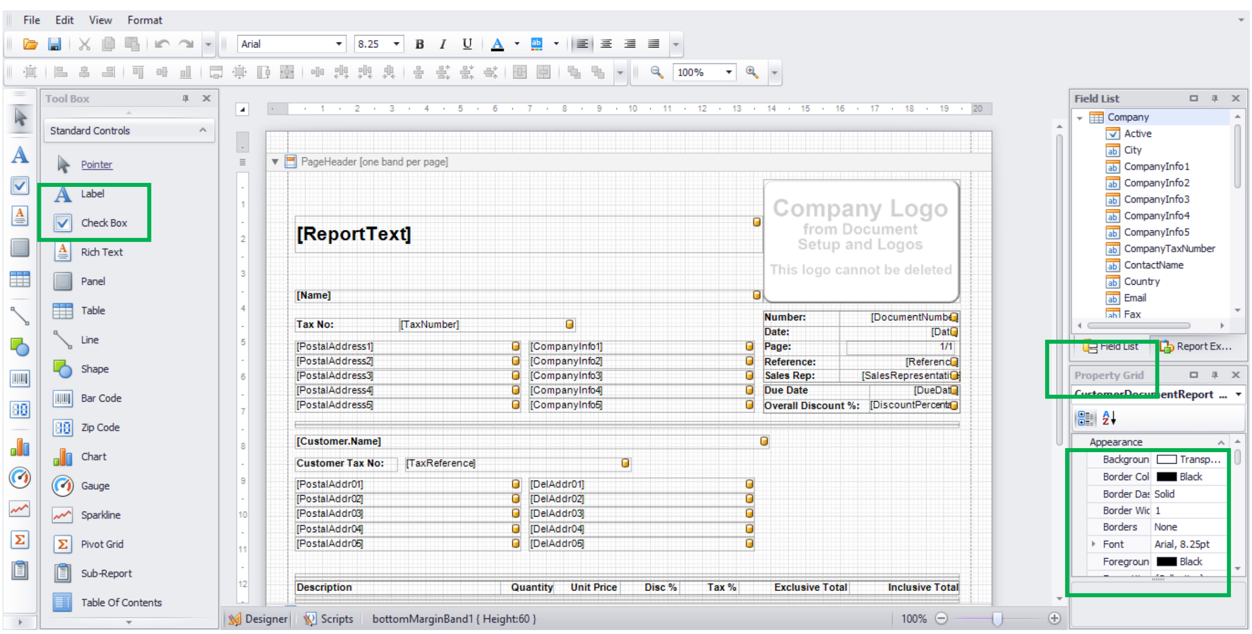
Inserting a logo or picture

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.

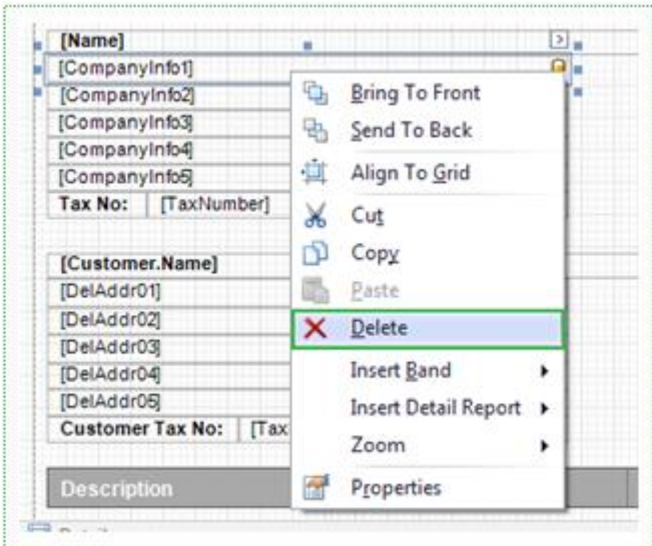


Repositioning your fields

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.

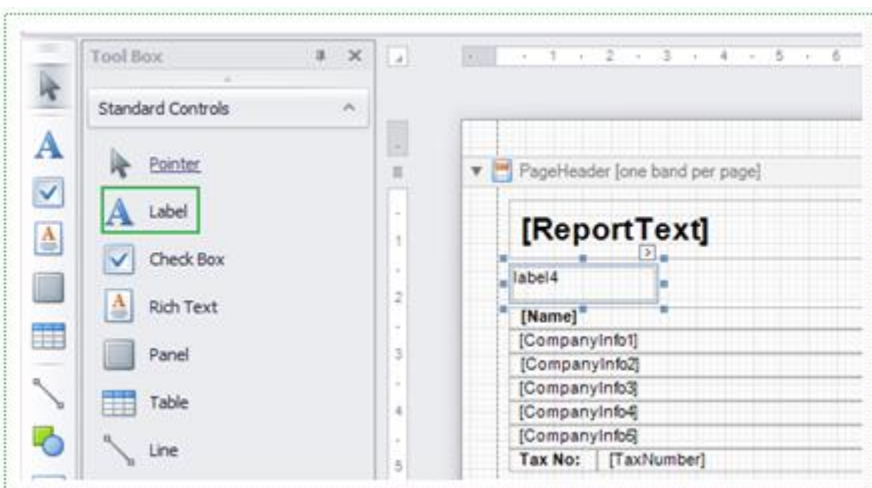


Copying Fields

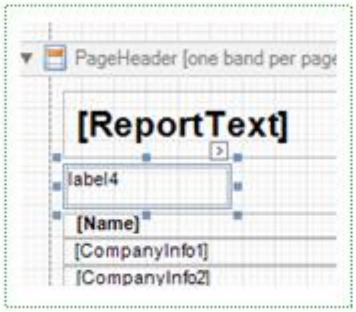
To copy a field, highlight the box, right click and select the copy option from the menu.

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.

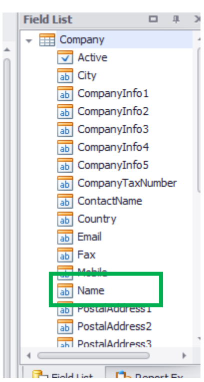


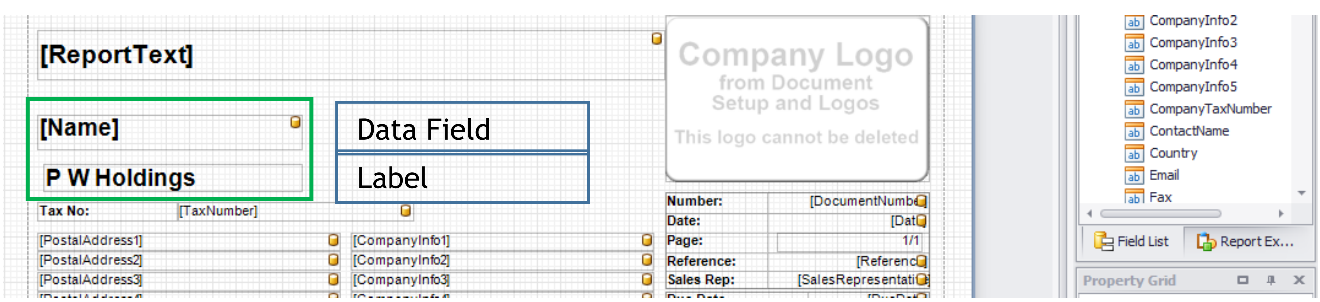
Changing your font

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.

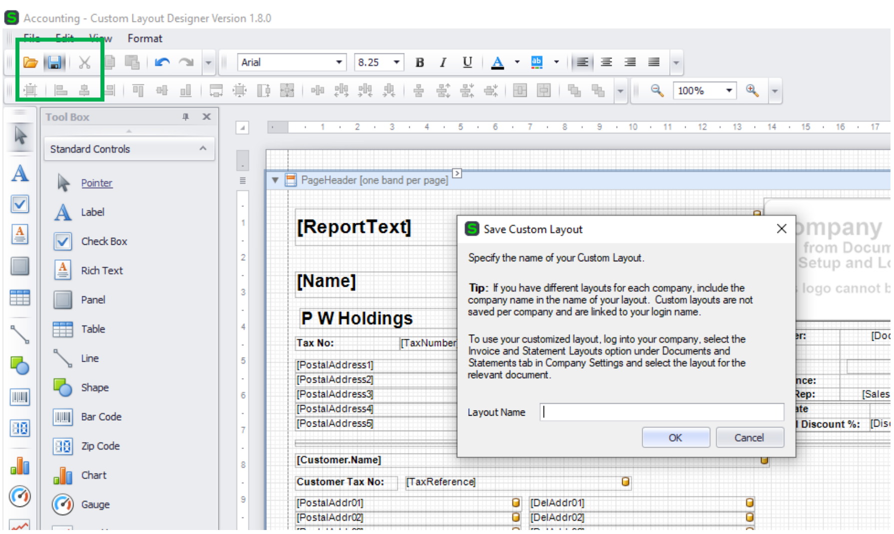
Your layout will now be saved.

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.

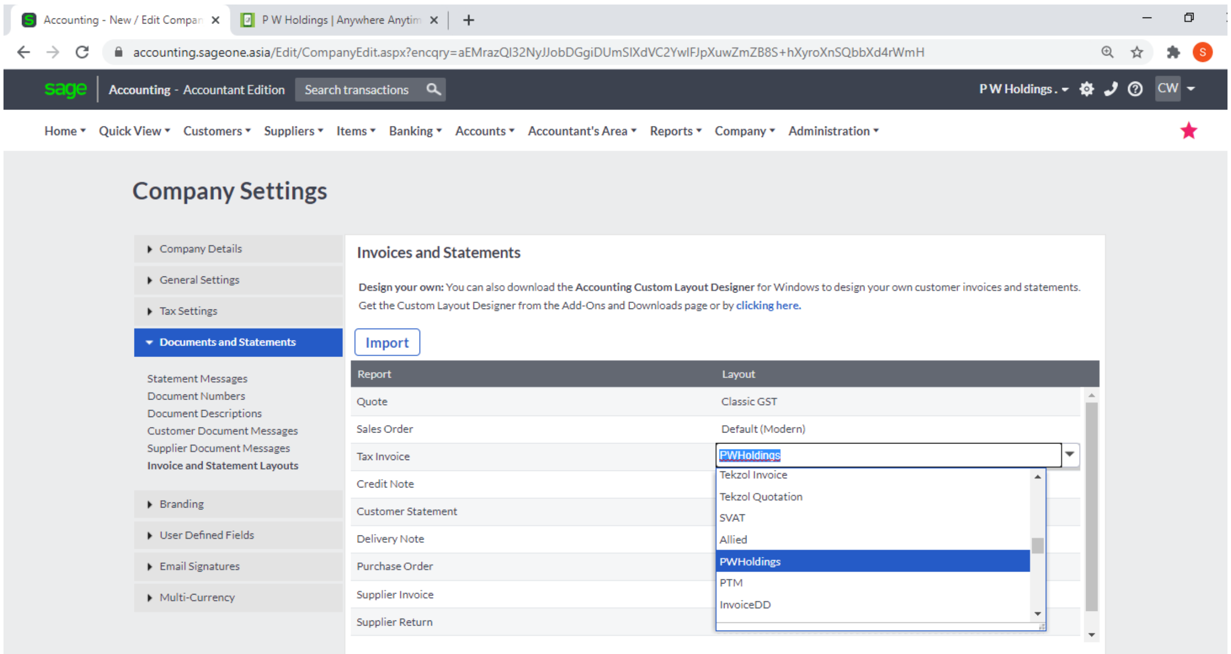
Enter Layout Name.

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

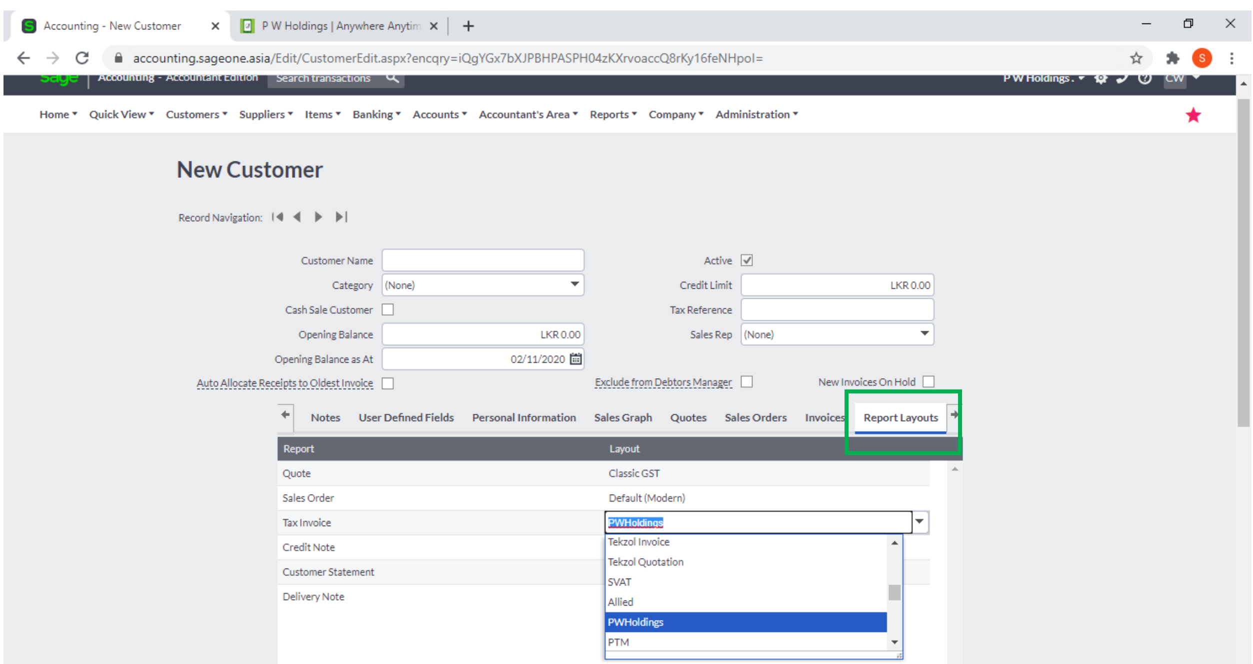


After designed the layout you can set layout in following screens.

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.)



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)



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)