

## Sage One Custom Layout Designer

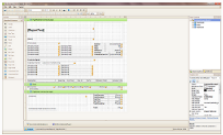
The Sage One Custom Layout Designer allows you to customise the following:

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

To download this application, go to the Sage One Accounting website. Click on the Add-ons menu option. Scroll down until you see the Sage One Report Designer section:

### Desktop Add-Ons and Downloads

#### Custom Layout Designer and Desktop Widget



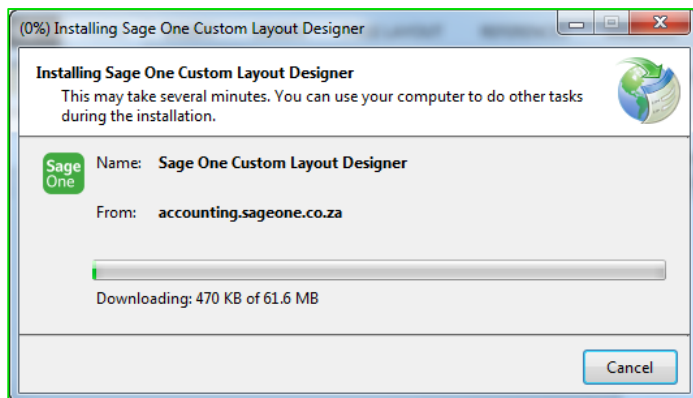
#### Sage One Custom Layout Designer for Windows

Download the Sage One Custom Layout Designer and design your own customer and supplier invoices and statements!

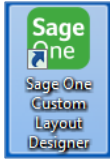
Release Date : July, 2014  
Version : 1.1.9  
Download Size : 61.6 MB

[Download](#)

Click on the Download button. Install the application on your computer.



A shortcut icon will display on your Desktop.



Double click on the icon to log into the Sage One Accounting Report Designer.

*Important Note: The Sage One Custom Layout Designer is only compatible with Windows Operating Systems.*

### Customise your Report using Custom Layout Designer

The Custom Layout Designer is a desktop tool that you can download and use to create your own customer and supplier invoice and statement layouts.

Steps to customise:

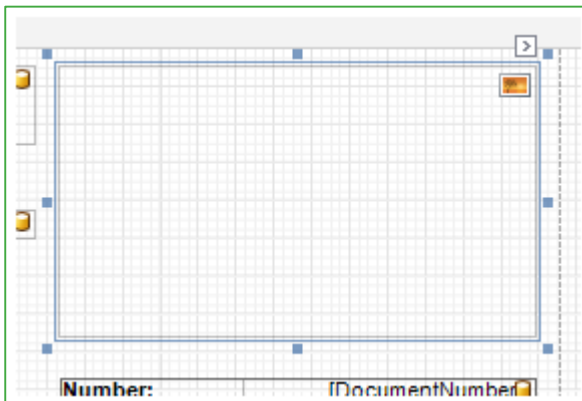
- Load the Custom Layout Designer. Choose the type of layout to customize.
- Change the layout for your business. Note: Your company logo cannot be added onto the layout you are customising. Ensure that your company logo has been selected under your Company Settings...Branding...Company Logo.
- Save the layout.
- Under Company Settings...Documents and Statements...Invoice and Statement Layouts, choose the customised layout you wish to use for each report.

We will cover the following customisation topics:

- Inserting a logo or picture
- Changing your font
- Inserting a new field
- Repositioning your fields
- Deleting Fields
- Copying Fields
- Preview

## Inserting a logo or picture

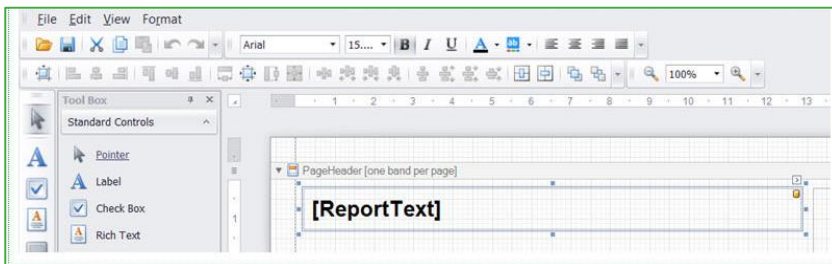
In Sage One Accounting, you upload your Company Logo in the Company Settings section. Do not delete the picture box on your layouts.



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

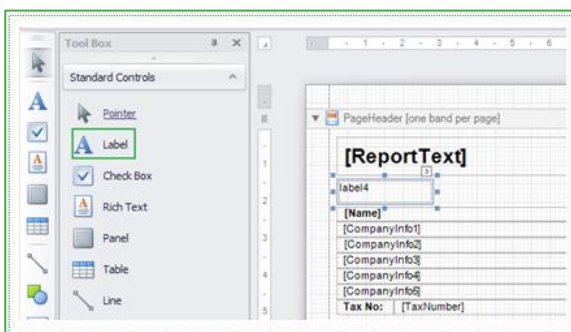
## Changing your font

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

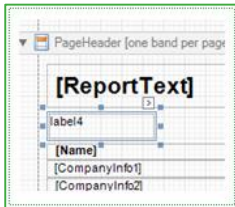


## Inserting a new field

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.

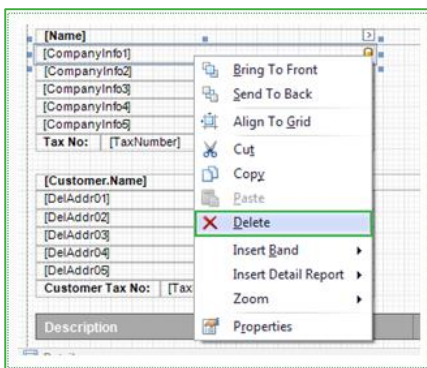


## Repositioning your fields

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.

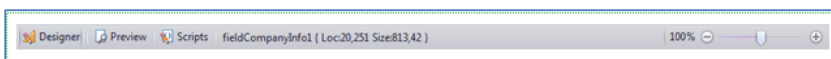


## Copying Fields

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

## Preview

Click on the Preview button to view your report before saving it.



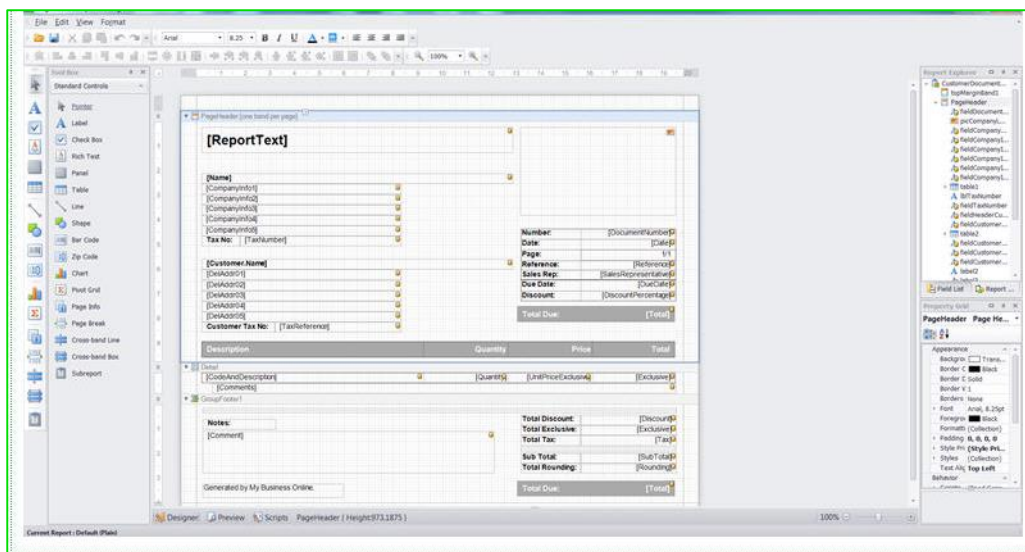
## The Report Explorer and Field List

The Field List and Report Explorer helps you explore the different fields within the layout.

### Field List

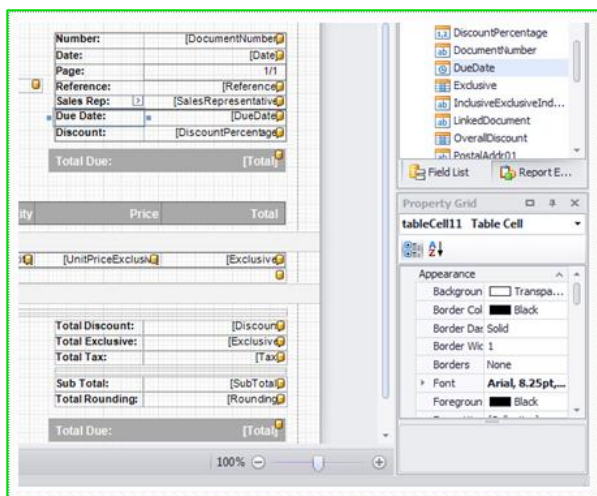
The Field List is located on the right hand side of the screen.

When you click on the Field List tab, a list of the layout fields display.



If you click on a field in the layout the corresponding field highlights in the Field List.

To add a field with similar calculations or properties, drag and drop the selected field onto the layout.

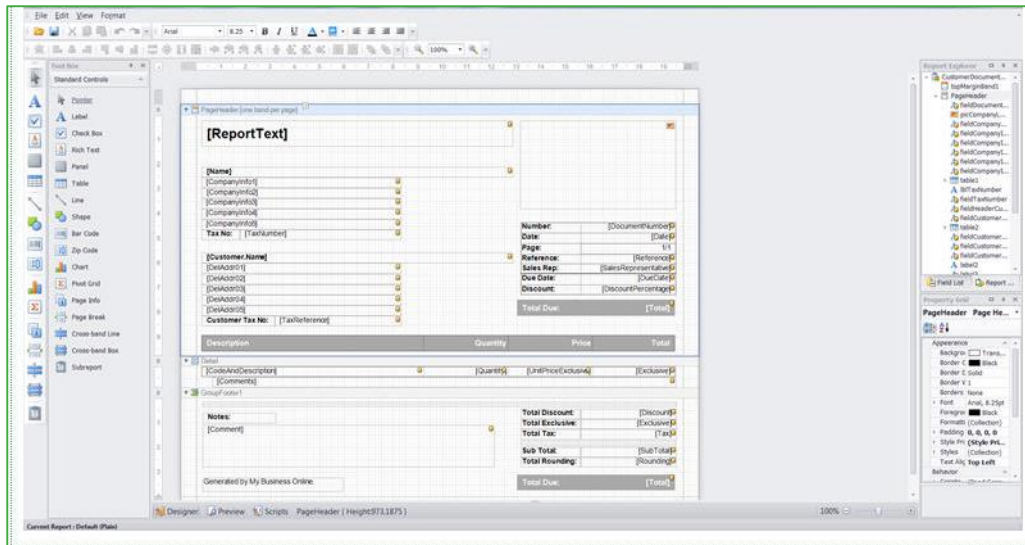


Sage One Accounting will automatically filter the correct information into the added fields when you print or email the customer or supplier document.

## Report Explorer

The Report Explorer is situated on the right hand side of the screen. When you click on the Report Explorer tab, the explorer displays.

If you click on a field in the explorer the corresponding field will highlight in the layout.

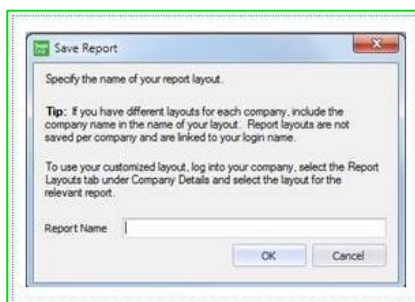


## Saving your layout

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

*Important Information: You cannot customise the default layouts.*

The Save Report screen displays:



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

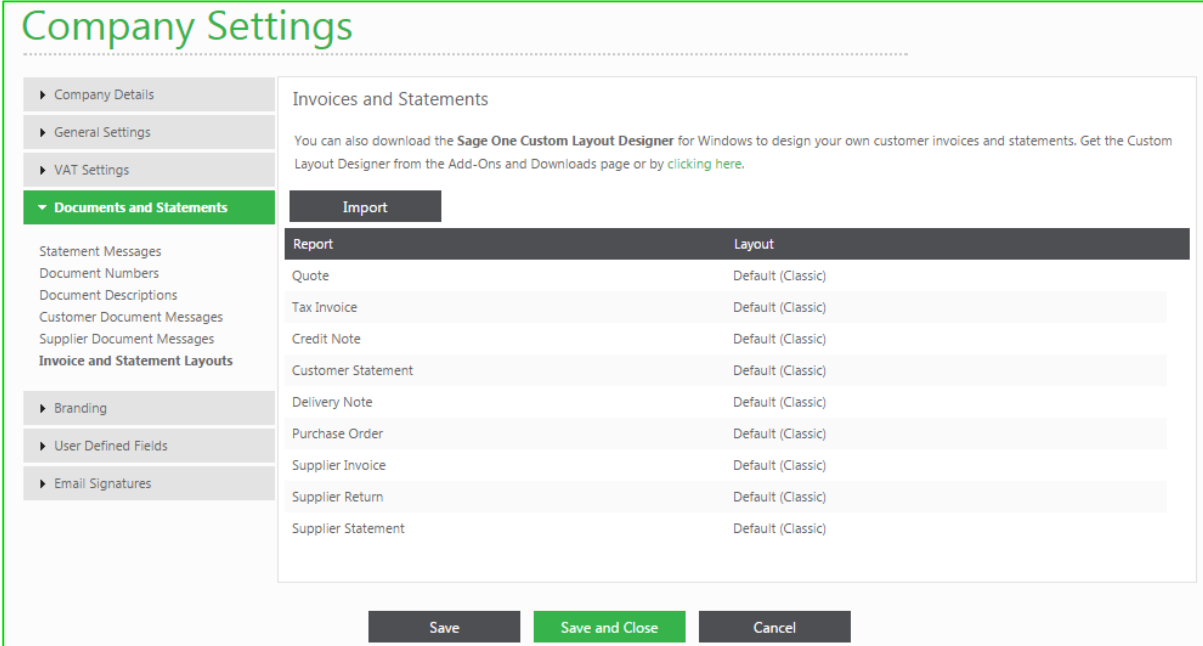
Your layout will now be saved.

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

## Selecting your Layouts

After you have saved your layout, it will be available in your Sage One Accounting company.

To select your new layouts, click on the Company Settings link at the top of the page. Navigate to the Documents and Statements tab and select the Invoice and Statement Layouts option, on the Company Settings screen.



The screenshot shows the 'Company Settings' page with the 'Documents and Statements' tab selected. The 'Invoice and Statement Layouts' section is active, displaying a table of layouts and their current settings. An 'Import' button is visible above the table, and 'Save', 'Save and Close', and 'Cancel' buttons are at the bottom.

Report	Layout
Quote	Default (Classic)
Tax Invoice	Default (Classic)
Credit Note	Default (Classic)
Customer Statement	Default (Classic)
Delivery Note	Default (Classic)
Purchase Order	Default (Classic)
Supplier Invoice	Default (Classic)
Supplier Return	Default (Classic)
Supplier Statement	Default (Classic)

Select your new layout from the drop down menu.

The Sage One Custom Layout Designer will also allow you to export your layout and import it into Sage One. Click on the Import button to import your layout.

Click on the Save button.

[www.sageone.co.za](http://www.sageone.co.za)

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