



Customizer Overview Document

for Sage 100 ERP

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Introduction

This document includes overview information about each task in the Customizer module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Main Menu

Customizer Selection

Navigation

Access this window using one of the following methods:

- Select Custom Office Main menu > Customizer Selection.
- On the Customizer Toolbar, click the Customizer Selection Screen button.

Overview

Use Customizer Selection to select a panel to customize or to select a panel with existing modifications. You can delete and print customized panels.

User-Defined Field and Table Maintenance

Navigation

Select Custom Office Main menu > User-Defined Field and Table Maintenance.

Overview

Use User-Defined Field and Table Maintenance to add or modify user-defined fields. You can edit and search for tables, as well as create and maintain user-defined tables (UDTs) for some modules. You create user-defined system tables that can be shared across multiple companies. You can also assign scripts to table events, as well as create and edit existing scripts.

NOTE Tables such as those that are for generating reports like AR Aged Invoice Report Work do not allow scripting events.

User-Defined Script Maintenance

Navigation

Select Custom Office Main menu > User-Defined Script Maintenance.

Overview

Use User-Defined Script Maintenance to create, assign, and compile scripts for each of the table and column events. Events can only be assigned to tables which have an assigned business object in User-Defined Field and Table Maintenance. These are typically tables that have an associated entry screen such as, AR Customer Master or SO Sales Order Header. Tables that are for generating reports such as, AR Aged Invoice Report Work, do not allow scripting events.

A single script can be tied to multiple events. For example, a script could be written to enforce a validation for an item code, which could then be attached to the item code column in Sales Order Entry, Invoice Data Entry, and Transaction Entry.

Clicking Delete does not delete the script file, only its definition.

NOTE Adding an external link button to a panel is still supported in Customizer Selection.

Reports Menu

Customizer Summary Report

Navigation

Select Custom Office Main menu > Customizer Summary Report.

Overview

The Customizer Summary Report lists customized panels and can be printed for a selected module, company, or user. The report includes the name of the panel and description.

Customizer Detail Report

Navigation

To print the Customizer Detail Report with specified options and selection criteria:

- Select Custom Office Reports menu > Customizer Detail Report.
- Select Custom Office Main menu > Customizer Selection. In the Customizer Selection window, click Print.

To print the Customizer Detail report for a selected panel:

- Select Custom Office Main menu > Customizer Selection. In the Customizer Selection window, on the button bar, click Print Panel.
- Select Custom Office Main menu > Customizer Selection. In the Customizer Selection window, select the panel to print the Customizer Detail Report for. Double-click the panel. In the Customizer Panel Selection window, select the Create a New Customized Panel option or Modify an Already Customized Panel option. Click OK. On the Customizer Toolbar, click the Print button.
- In the Customizer Panel Selection window, select the Modify an Already Customized Panel option. Select a customized panel and click Print.

Overview

The Customizer Detail Report prints detailed information for selected panels. The panel name, header settings, and settings for each control on the panel print on the report. You can print the Customizer Detail Report for a specific module, all modules, or all tasks. You can enter a selection of companies and users to print panel information for.

Utilities Menu

Rebuild Customizer Log

Navigation

Select Custom Office Utilities menu > Rebuild Customizer Log.

Overview

Use Customizer Log Rebuild Utility to rebuild the Customizer Log file. The Customizer Log file should be rebuilt whenever you move or copy library files (files with a .LIB or .M4L extension) to or from any subfolder in the ..\XX\CUSTOM folder, where XX is the two-character code for a module. This utility is useful when you want to install customized panels from another installation.

During the rebuild process, the Customizer Log file (CM_LOG) is reinitialized, each module folder is checked for a CUSTOM subfolder, and each CUSTOM subfolder is checked for customized files. An entry is made in the Customizer Log for each .LIB and .M4L file found.

Update Custom Panels to Current Level

Navigation

Select Custom Office Utilities menu > Update Customized Panels to Current Level.

Overview

Use Customizer Library Update Utility to merge changes from a customized panel with a new installed version of the software. This utility should be used whenever a new version of the software is installed on your system. The Customizer Library Update Utility allows you to maintain the integrity of your system in the event that your customizations conflict with the new version of the software. Failure to perform the update process can cause the customized programs to perform unpredictably.

During the update process, a new library file (a file with a .LIB or .M4L extension) is created for each customized panel based on the current library file in the module folder. The properties of each customized item are updated to the new library file, and the old customized library file is removed.