# CHAPTER 3: CUSTOMIZING WINDOW LAYOUTS

## Training Objectives

Actively participating during this chapter helps you learn how to:

- Modify window displays.
- Modify fields in the layout window.
- Add fields to a window.
- Add fields to a scrolling window.
- Set the tab sequence in a window.
- Add graphics to a window.

# Changing Individual Window Displays

Microsoft Dynamics™ GP uses text prompts as identifiers for objects that exist on a window such as fields, list boxes, option buttons, and check boxes. Using the Modifier Layout window, you can change the existing text that appear in Microsoft Dynamics GP. Text prompts can be changed for a single window so the wording is more reflective of your business's activities. You can also have text prompts stand out by changing fonts, color, and formats.

***HINT:*** *To rename a prompt throughout the entire application, use the* ***Strings*** *option on the Resources menu. For more information on this menu option, refer to the "Changing Global Resources" section found later in this training manual.*

## Modifying the Text Prompt

To modify the text prompt from within Modifier:

1. Open the form and window that contains the text prompt you want to change.
2. With the window layout open, click the static text tool in the Toolbar window.
3. Click the prompt you want to modify.

4. Use the arrow keys to position the cursor within the prompt, and edit the existing text using your keyboard.
5. After changes are complete, click another text prompt to modify or select the arrow tool to make other selections within the layout.


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## Setting Visual Properties for the Text Prompt

You can set visual properties for any object in the window layout, including text items such as prompts. Visual properties allow you to change the color, font, and format of a text item to make more important information stand out. If the Properties window is not displayed, select the Layout menu then Properties. Next select the prompt with the arrow tool, and then move the pointer to the Properties window.

***HINT:*** *Set the same drawing options for more than one prompt at a time by pressing the shift key and selecting all of the fields to change. Then when using the Properties window, the properties are set for all of the selected items.*

For example, you want to display the text prompt of a field in red to distinguish this information from other information in the window.

The following table lists the visual properties available for text prompts. Asterisks (*) indicate the properties that can be changed using Modifier.

| Visual Property | Description |
|---|---|
| Alignment* | For text objects, indicates whether the text is left, center, or right-aligned. |
| Appearance* | Changes the way the object draws on the window. Select from: 2D Border, 3D Border, or 3D Highlight. |
| BackColor* | Specifies the background color of the object. |
| Border* | For text objects, specifies whether a border is drawn around the object. |
| Font* | Specifies the type style and size to use for text objects. |
| FontBold* | If set to true, displays text objects in bold type. |
| FontColor* | For text objects, specifies the color of the text. |
| FontItalic* | If set to true, displays text objects in italic type. |
| FontUnderline* | If set to true, underlines text objects. |
| Pattern* | Specifies the pattern to apply to the background. |
| PatternColor* | Specifies the color of the pattern applied to the background. |
| Position – Left* | Indicates the position of the left edge of the object, measured in pixels from the left edge of the window. |
| Position – Top* | Indicates the position of the top edge of the object, measured in pixels from the top of the window. |
| Resize – Horizontal* | Indicates how a field should grow or shrink horizontally when resized. |
| Resize – Vertical* | Indicates how a field should grow or shrink vertically when resized. |
| Size – Height* | Indicates the object height, measured in pixels. |
| Size – Width* | Indicates the object width, measured in pixels. |
| Visible* | Specifies whether the text prompt should be visible. |
| Zoom* | Specifies whether a visual indicator appears for the field. The visual cue indicates that you can click the text prompt to zoom to more information for the corresponding field. If set to true, the text appears with an underline and a custom font color. |


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## Repositioning and Resizing the Text Prompt

Changes made to the prompt name or the style of text can move the prompt slightly out of alignment or require you to adjust the size of the object. To reposition the prompt, use the arrow tool to select the object. After the prompt is selected, "handles" appear on the text object. These indicate which prompt is selected and can be used to drag the prompt to a different location on the window.

To resize the prompt, use the arrow tool to select the object. Once selected, "handles" again appear on the text object. These allow you to resize the prompt. Click and drag on the appropriate handle to specify a new size for the text prompt.

***HINT:*** *After the text prompt has been selected, use the arrow keys on your keyboard to move the prompt one pixel at a time to the left, right, up or down. In addition, the Properties window can be used to specify the pixel position and pixel size of each text object.*

## Previewing and Saving the Modifications

With a window layout open, preview the changes made to the window by selecting LAYOUT→PREVIEW. The form is not functional but it displays your modifications.

Continue making changes to this window using other procedures in this manual, or save the changes by closing the layout. There is no menu option to save changes. When closing the layout, an alert message appears asking you to Save, Discard, or Cancel the changes. If satisfied with the changes to this window, click the **Save** button.

To view all of the changes made with Modifier, return to Microsoft Dynamics GP and grant access to the modified windows using either the User Class Setup or Security Setup window.

# Modifying Fields in a Microsoft Dynamics GP Window

Fields are used on windows to display specific information from the tables in the application. Using Modifier, you can manipulate how the data appears in a Microsoft Dynamics GP window by changing the way the information currently displays or by adding new information. Modify fields the following ways:

- Rearrange the fields on a window
- Hide fields not being used
- Add fields

## Modifying Field Displays

As with text prompts and other objects on a Microsoft Dynamics GP window, you can modify fields and the information that displays in those fields. Using the Layout window, change font types, sizes, and colors to make the window look more like your paper forms or to draw more attention to important information. Also rearrange fields in the window so they appear in the order in which you prefer to use them.

### *Selecting a Field on the Window Layout*

Open the form and window that contains the field you want to modify. When the window layout appears, use the arrow tool from the Toolbox to select a field on the window. Selecting the field with the arrow tool places "handles" on an object.

### *Setting the Properties for a Field*

With a field object highlighted or selected in the layout window, you can set a variety of options for that field using the Properties window. These options determine how the field is displayed and how data can be entered into the field.

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***HINT:*** *Set the same field properties for multiple fields at one time by pressing the Shift key and selecting all of the fields to change.*

The following tables list the object and visual properties that are available for a field. Asterisks (*) indicate the properties that can be changed using the Modifier.

| Object Properties | Description |
|---|---|
| AutoComplete | For string fields, specifies whether the field will use the auto-complete capability. If this property is set to true, the contents of the field will automatically be completed as the user types, based on a list of values associated with the field. |
| AutoCopy | Specifies whether information can be automatically transferred between the field in the window and its corresponding table field. If set to false, the field is unaffected by processing that copies information to or from the field. |
| Cancel | If set to true, the process associated with this field runs when the user presses Esc on their keyboard. This is typically set to true for a **Cancel** push button field and is available only for push button fields. |
| DataType* | Indicates the data type used for the field. |
| Default | If set to true, the process associated with this field runs when the user presses Enter or Return on their keyboard. This is typically set to true for **OK** or **Save** push button fields and is available only for push button fields. |
| DefaultDblClick | Setting this property to true allows the user to double-click a list box field to accomplish the action of selecting an item and clicking the push button whose Default property is set to true. |
| DisableLookup* | If set to true, this property disables corresponding lookup push buttons as soon as the given field is disabled. |
| DraggableCols | Applies only when the list view is displayed in report view mode. True indicates the user can reorder columns by dragging them. False indicates columns cannot be reordered by the user. |
| Editable* | Specifies whether the user can edit the contents of the field. |
| EditMode* | For text fields, this property specifies how text fields can be edited. If set to DisplayOnly, the text field cannot be edited. If set to Editable, the text field can be edited. If set to SelectOnly, the text can be selected, but not changed. |
| EndTransaction | When set to true, this means that all processing for a transaction is completed when the push button is selected. This property is available only for push button fields. |

| Object Properties | Description |
|---|---|
| Field | Indicates the name of the field used and allows you to view characteristics of the field definition. |
| FieldID | Indicates the resource ID of the field. |
| FieldType | Indicates whether the field is a global field or a local field. |
| HelpContextID | Lists the help context ID value for the field. |
| Hyperspace | If set to true, the processing scripts run for the field as soon as it is selected, but focus does not move to the field. It remains in the field that previously had focus. This property is available only for button fields. |
| LinkedFormat | Lists the format field linked to the current field. |
| LinkedLookup | Lists the lookup field (typically a button field) linked to the current field. |
| LinkedPrompt | Lists the prompt linked to the field. |
| MultiSel | True indicates multiple items can be selected in the list view. False indicates only one item can be selected. |
| Password* | If set to true for string fields, the field displays X's instead of the data entered in the field. This is typically used for password fields. Click this option if you want to display the field, yet not the information in the field. |
| Required* | Specifies whether the field is required for a transaction or record to be saved correctly. Set this property to true to be sure the user enters a value in this field. Also, if set to true, and the Show Required Fields menu item is selected, any prompt linked to the field is displayed according to the color and style specified in the User Preferences window. |
| SaveOnRestart* | If set to true, when the form or window is restarted it causes the field to keep the value last entered in it. If set to false, when the window is restarted it clears the field. |
| ScrollBars* | If set to true, a text field has scroll bars. If set to false, no scroll bars are displayed. |
| SetChangeFlag* | Specifies whether changes to a field's value set the change flag for the form or window. If set to true, the change flag is set when the contents of the field change. If set to false, the change flag is not set. |
| SortMethod | Specifies how items in list view or tree view fields are sorted. |
| TabStop* | Specifies whether the field should be included in the window's tab sequence. If set to false this field is not included. |


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| Object Properties | Description |
|---|---|
| Tooltip* | Can be used to specify additional information about a field on a window. The additional detail displays as a user drags their mouse over the given field. This property is available for all fields. The maximum size of a tooltip is 79. |
| UseUniqueHelp | If set to true, a unique HelpContextID is generated for this instance of the field. If set to false, the same HelpContextID is generated for all instances of this field within the application. |
| VisibleItems* | For drop-down list and combo box fields, specifies the maximum number of items displayed when the list is displayed in the dropped position. |
| WordWrap* | If set to true, text automatically word wraps when typed to the right edge of the field. This also removes the horizontal scroll bar from the field. This property is only available for text fields. |
| Alignment* | Specifies whether contents should be Center, Left, or Right aligned. |
| AltLineColor* | If set to true, alternate lines of the list view will appear with a different color. |
| Appearance* | Changes the way the object is displayed on the window. Select from: 2D Border, 3D Border, and 3D Highlight. |
| BackColor* | Specifies the background color of the field. |
| Border* | If set to true, a border is drawn around the field. |
| Direction* | For progress indicator fields, indicates the direction the bar will move in the progress indicator. |
| DropIndicator* | For button drop list fields, specifies whether the drop indicator will be displayed. |
| DropPosX* | For button drop list fields, specifies the distance in pixels the drop indicator will be drawn from the right edge of the control. |
| DropPosY* | For button drop list fields, specifies the distance in pixels the drop indicator will be drawn from the bottom edge of the control. |
| ExpandButtons* | For tree view fields, setting this property to true causes expansion buttons to be shown for nodes that have children. |
| Font* | Specifies the font to use for the field. |
| Font-Bold* | If set to true, the field text is displayed in bold type. |
| FontColor* | Specifies the color of the text for the field. |
| Font-Italic* | If set to true, the field text is displayed in italic type. |


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| Visual Properties | Description |
|---|---|
| Font-Underline* | If set to true, the field text is underlined. |
| FullRowSelect* | When set to true, the entire row in the list view field is selected. When set to false, individual row items can be selected. Applies only when the list view is displayed in report view mode. |
| GridLines* | When set to true, grid lines are drawn between items in the list view. Applies only when the list view is displayed in report view mode. |
| ImageSize* | Specifies how list view images are sized. System indicates the images will be scaled to standard system sizes (16 by 16 or 32 by 32 pixels). First Image indicates images will be scaled to the size of the first image defined for the list view field. |
| Indent* | For tree view fields, specifies how many pixels child nodes are indented from the parent. The value 0 allows the control to automatically specify the amount. |
| IndicateColor* | Specifies the color of the progress indicator blocks or bar. |
| Lines* | Specifies how lines are drawn in the tree view field. If set to None, no lines are drawn. If set to TreeLines, lines are drawn for nodes below the root level. If set to RootLines, lines are drawn for all nodes. |
| Pattern* | Specifies the pattern to apply to the background. |
| PatternColor* | Specifies the color of the pattern that is applied to the background. |
| PatternSelect* | Specifies the pattern used when a push button-style check box is selected. |
| Position – Left* | Indicates the position of the left edge of the field, measured in pixels from the left edge of the window. |
| Position – Top* | Indicates the position of the top edge of the field, measured in pixels from the top of the window. |
| Resize – Horizontal* | Indicates how a field should grow or shrink horizontally when resized. |
| Resize – Vertical* | Indicates how a field should grow or shrink vertically when resized. |
| Scaling* | For picture fields, specifies how the picture pasted into the field will be scaled. Proportional indicates the picture will maintain its original size and proportions. Stretch indicates the picture will be stretched to fill the picture field. |


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| Visual Properties | Description |
|---|---|
| ShowHeadings* | When set to true, column headings are shown in the list view. Applies only when the list view is displayed in report view mode. |
| ShowPartialItems* | For native list boxes, setting this property to true causes the list box to be drawn exactly the height indicated in the layout window. If there is not enough room to display the last item, it will be only partially drawn. When this property is set to false, the list box will be resized vertically to include just the last complete item. |
| ShowSelection* | For tree view and list view fields, indicates whether the selected node or item is indicated when the field does not have focus. |
| Size-Height* | Indicates the field height, measured in pixels. |
| Size-Width* | Indicates the field width, measured in pixels. |
| Style* | For push button and button drop list fields, specifies whether the button will display text only, graphics only, or both text and graphics. It also specifies the arrangement of the text and graphics. |
| Visible* | If set to true, the field is visible to the user. If set to false, the field is hidden. |
| Zoom* | For push button fields, setting this property to true causes the pointer to become the zoom pointer (magnifying glass) when it is moved over the field. Typically, the Visible property is also set to false to make the push button invisible. |


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### *Working with Field Properties*

There are some general things to know when working with field properties. They include:

- The Required selection cannot be set to false for fields already selected as required in the original forms. However, the fields set as required can be unmarked at a later time.
- Fields cannot be made invisible if they are required by Microsoft Dynamics GP. If this is the case, the settings box does not allow you to scroll down when the Visible property is selected.
- If a field is made invisible, it should also be made non-editable to avoid accidentally moving the cursor to the field with the Tab key or the mouse.
- Making a field invisible makes the field not appear in a Microsoft Dynamics GP window, including viewing it with Modifier. However, if the Show Invisible Fields option is selected from the Layout menu within the Modifier, the field is displayed again so you can select it as visible.
- The fonts displayed are those currently supported with Modifier. Additional fonts installed in your operating system do not appear in this list.

### *Repositioning the Field on the Window*

Using the arrow tool, drag the field to the location in the window where you want it to appear. If the field has a prompt, select the prompt and the field at the same time to move both objects on the window layout.

### *Previewing and Saving the Modifications*

Select Preview from the Layout menu to preview the changes made to the window. The form is not functional, but it displays your modifications.

Continue making changes to this window using other procedures in this manual, or save the changes to this window by closing the layout. When closing the layout, an alert message appears asking you to Save, Discard, or Cancel the changes. If satisfied with the changes to this window, click the **Save** button.

To view all of the changes made with Modifier, return to Microsoft Dynamics GP and grant access to the modified windows using either the User Class Setup or Security Setup window.


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# Adding Fields to a Window

By adding fields to an existing Microsoft Dynamics GP window, you can create data entry forms that are customized to meet your business needs. Use Modifier to add fields to a window two different ways.

- Add fields to a window from a Microsoft Dynamics GP table that is auto-linked to the window.
- Create new fields to add to the window that are populated through the use of Visual Basic for Applications.

Many of Microsoft Dynamics GP windows are automatically linked to a particular table to make the transfer of information between the window and table possible. Because of this, if a field in the auto-link table does not currently appear on the corresponding Microsoft Dynamics GP window, it can be added to the window using Modifier. Then since the field is contained in the auto-linked table, Microsoft Dynamics GP code already exists to handle the transfer of information for that field. In addition, if two or more windows share the same auto-linked table, fields in the table can be moved from one window to another. This can occur without affecting the integrity of the data or the accounting logic in the application.

New fields can also be created through Modifier. These new fields can be added to any of the existing Microsoft Dynamics GP windows. Visual Basic for Applications code can then be written to display information in those new fields or to store the information in a new data table.

## Adding Linked Fields

Open the window layout for the window you want to modify. If a table is auto-linked to that window, the table appears in the drop-down list within the Toolbox. Select the linked table and scroll through the list to view all fields that exist in that table. If there are fields to add to the window, use the arrow tool to highlight the field and drag it to the window layout.

***NOTE**: Not all Microsoft Dynamics GP windows have an AutoLink table.*

In Microsoft Dynamics GP, navigate to the Vendor Maintenance window by selecting CARDS→PURCHASING→VENDOR. From the menu, select TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW to open this window in Modifier. The PM_Vendor_MSTR table is auto-linked to the PM_Vendor_Maintenance window, but the window does not contain all of the fields in the table. For example, it does not include "Modified Date." This means you can add the **Modified Date** field to the layout using Modifier, and when entering the Microsoft Dynamics GP, the field is automatically shown.

***NOTE**: To remove fields from the window's layout, highlight the field, and select **Clear** from the Edit menu. You can only remove the fields you added to the window; fields already appearing in the window must remain there, but can be made invisible using the Field Options window.*

***NOTE**: When a field is added to a window, the size of the field defaults to a size determined by its keyable length, format, font, point size, and style. If you resize the field so it is shorter than its keyable length, scroll the field horizontally to view all of the data for the field when it is displayed in the application.*

## Creating New Local Fields

Using Modifier new fields can be created and added to any of the existing windows in Microsoft Dynamics GP. These new fields are created as local fields and can be made in a couple of different ways. They can be created using the appropriate tool from the Toolbox window, or by clicking the **New** button on the Toolbox under the list of local fields.

### *Using the Toolbox Window*

The Toolbox Window contains different types of objects available in the application. To add an object to an existing window, select the appropriate tool you want to create. Move the cursor to the window layout area, and click where you want to position the new object. The new object is drawn on the window and defaults with a name corresponding to the type of tool used to create it. For example, a new check box field can be created with the name (L) CheckboxM29. The name can be changed to be more meaningful to the user.


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New local fields that have been created can be displayed by selecting Local Fields from the drop-down list. New local fields can also be created using the **New** button, or local fields that already exist can be edited using the **Open** button.

The toolbox also contains tools you can use to add new fields to a window. As you move the cursor over each tool, the tool tip will display. A description of the tool can be found in the help file (Toolbox, creating local fields).

| Tool | Name | Tool | Name |
|---|---|---|---|
| | Push button tool | | Drop-down list tool |
| | Combo box tool | | List box tool |
| | Multi-select list tool | | Big text tool |
| | String tool | | Integer tool |
| | Currency tool | | Date tool |
| | Time tool | | Visual switch tool |
| | Horizontal list box tool | | Radio group tool |
| | Radio button tool | | Check box tool |
| | Progress indicator tool | | |

***NOTE:*** *If multiple option buttons are added to a window, they must be in a radio group or they will not be visible at runtime. First draw the radio group onto the window, and then place the option buttons inside.*

After the new fields have been created, they can be further defined using the Local Field Definition window.

### *Using the Local Field Definition Window*

The Local Field Definition window can be used to create new fields to add to a Microsoft Dynamics GP window. It can also be used to edit a new field created using the Toolbox. To open the Local Field Definition window, select Local Fields from the drop down list found on the Toolbox. To create a new field, select the **New** button that appears under the list of local fields. If a new field already exists that you want to edit, highlight that field from the list, and click the **Open** button. The Local Field Definition window appears as shown below.

Using the Local Field Definition window, select to change the name assigned to the field, specify a Lookup Form, indicate an Array Size, change the Control Type, or assign Static Text Values. To save any changes made, click the **OK** button. The Local Field Definition window closes, and you can select to add the field to the window by clicking on it within the list of local fields and dragging it to the window layout area.


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### *Field Name*

The field name assigned to the local field is the name used to refer to the field using Visual Basic for Applications (VBA). If using the tools in the Toolbox to add a local field to the layout, a default name is created based on the control type and the order the field was placed in the layout. Using the Local Field Definition window, this default name can be changed to describe the field more clearly.

### *Lookup Form*

The **Lookup Form** field allows you to attach a lookup form to the field. When a lookup form is attached to the field and the focus is on the field, the user can open the attached form by clicking Lookup from the Help menu. Click the lookup button to open the Resource Lookup window, where you select a form to function as the lookup form.

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***NOTE:*** *The Lookup Form feature is no longer used in Microsoft Dynamics GP. Rather, the Lookup buttons are linked to the fields using the Link Lookup option on the Tools menu.*

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### *Array Size*

An array field contains multiple occurrences of the same type of information. The individual pieces of information stored here are referred to as elements. When creating a field, you enter an array size for the field. The array size of a field indicates the number of elements included in the array field. If the field is not an array, set it to 0. For example, you could create an array field called Phone to store two phone numbers by specifying an array size of two. Note that Phone is a single field, but that it has two elements, each containing a phone number.

### *Control Type*

This defines the control type of the local field. A control type is a specific data display and storage method. The following list are recommended control types that you can use for new fields:

- Boolean
- Button drop list
- Check Box
- Combo Box
- Currency
- Date
- Drop-down list
- Integer
- List box
- Long integer
- Multi-select list box

- Non-native list box
- Progress indicator
- Push button
- Option button
- Radio group
- String
- Text
- Time
- Visual switch

Some control types have the same storage type but are displayed in different ways. When a tool from the Toolbox is used to create the new field, the control type defaults according to the tool. Using the Local Field Definition window, the default control type can be changed.

### *Static Text Values*

The Static Text Values lookup window allows you to define static text values for data types that use them. The following are control types that use static text values:

| Control type | Static text used to: |
|---|---|
| Button Drop List | Indicate the text on the button and the selections in the list. |
| Check box | Indicate the check box prompt name. |
| Drop-down list | Indicate the selections in the drop-down list. |
| List box | Indicate the selections in the list box. |
| Push button | Indicate the text displayed on the button. |
| Radio button | Indicate the name displayed next to the button. |
| Visual switch | Display two or more text values that will be displayed in sequence as the user clicks the visual switch. |


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These static text values are strings that appear on the buttons or in the list fields. The following Static Text Values window displays when the lookup button is selected.

To add static text values to a field, enter the string in the **New Value** field, and click the **Insert** button. To change an existing string, highlight the value within the Static Text Values list, make a change to the value using the **New Value** field, and click the **Replace** button. To remove a value, highlight the string and click **Remove**.

The **Sort List** check box can be used to change the order of the values in a list field when it is displayed in runtime. When the **Sort List** check box is selected, the items in the Static Text Values list are sorted in alphabetical order when viewed in the application.

***NOTE:*** *Selecting the* ***Sort List*** *check box does not sort the list in the Static Text Values window - the items are displayed in the order in which you inserted them.*

The Button Items window is used to specify the static text for button drop lists and push buttons. The static text would be placed in the Caption area for the control. Buttom Items can contain images, captions or both. When a control type is selected that can contain an image and text, the format window will appear as follows:

### *Making New Local Fields Functional*

After the new local fields are created, completely defined and added to a window, Visual Basic for Applications (VBA) code can be written to make them functional.

***NOTE:*** *VBA is a component of the Microsoft Dynamics GP Modifier and is available after Modifier is registered.*

## Adding Prompts for Each Field

Select the text tool from the Toolbox to create a prompt for this field. Place the cursor where you want the prompt displayed, type the prompt name and then set any visual properties for the prompt by displaying the Properties window and making the appropriate selections on the **Visuals** tab. Refer to the "Modifying Field Displays" procedure for a detailed explanation of how to change properties for any prompts added to the layout.


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There are several default property settings used for static field prompts. The following list of default properties should be used for static field prompts:

| Property | Value |
|---|---|
| Appearance | 3D Highlight |
| BackColor | System-Button Face |
| Border | True |
| Pattern | (None) |
| Pattern Color | Black |

## Linking Prompts for each Field

It is important to link the field to the appropriate text prompt. With this you can see if the field is a required field or if it has been disabled. To accomplish this, select Link Prompt on the Tools menu. Hold your cursor over the field and drag it to the text prompt you want to link it to. After all fields have been linked, turn this option off using the Tools menu.

## Setting Properties for the Field

You can set a variety of properties for the new fields added to the layout. These properties determine how the field is displayed and how data can be entered in the field.

# Adding Fields to a Scrolling Window

## Types of Scrolling Windows

Microsoft Dynamics GP scrolling windows are designed to display multiple lines of information with each line representing one record in a corresponding table. This is unlike other Microsoft Dynamics GP windows that display only one record at a time. There are three types of scrolling windows, they include the following:

| Type | Description |
|---|---|
| **Browse Only** | Allows viewing of records. |
| **Editable** | Allows editing existing records but not adding new records. |
| **Adds Allowed** | Allows the same abilities as the Editable scrolling window, but also allows adding of new records. |

In Modifier, to access the layout of a scrolling window, first open the window layout for the window that contains the scrolling window. Then double-click the scrolling window to open its layout window.

## Line Item Sections

The layout can be divided into two areas, the Small Line Item section and the Big Line Item section. The Small Line Item area displays when the scrolling window is shown. The Big Line Item area can be displayed or hidden depending on whether the user has selected the **Show** Button or the **Hide** Button.

A Small Line Item section is required. The Big Line Item section is optional.

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### *Viewing Line Item Markers*

The different sections of the scrolling window are identified by dotted lines that appear within the layout. However, the dotted lines are not evident unless the objects on the window are moved. Fields included above the first dotted line in the scrolling window are part of the Small Line Item. The fields included between the two dotted lines are part of the Big Line Item.

***NOTE:*** *In Modifier, the Small Line Item and Big Line Item sections can also often be identified by the different colors assigned to the fields in each section. Typically, the Backcolor for the fields in the Small Line Item are white and for the fields in the Big Line Item yellow.*

### *Changing Line Item Markers*

To change the size of the Small or Big Line Item sections, use the **Mark Small Line Item** and **Mark Big Line Item** options on the Tools menu. These options allow you to move the dotted line markers. After selecting the option, the cursor changes to indicate that you are ready to select a new section size. Click where you want the new marker to be. Make the section either smaller or larger depending on where the new mark is made.

***HINT:*** *Before changing the Line Item Markers, you may want to see the names of the fields inside of the scrolling window. To view the field names, click* ***Show Field Names*** *on the Layout menu.*

## Scrolling Window Fields

After opening the scrolling window layout, fields can be added to the window the same way they were added to other windows. Add a field from a linked table by using the Fields list in the Toolbox, or create a new local field using the Toolbox or the Local Field Definition window. You can also rearrange fields, or change the properties of fields as on other windows.

# Setting the Tab Sequence

A tab sequence is the order the fields are highlighted in a window when the tab key is pressed. Although the tab sequence has already been set for all Microsoft Dynamics GP windows, changes made to a window's layout or new fields added to a window can render an existing tab sequence ineffective. You can change the existing tab sequence to match the order your data entry personnel uses to enter information, ensuring they enter the most important information first. When entering transactions and other data this accomplishes the following:

- Reduces unnecessary keystrokes
- Enables users to enter data in a logical order
- Increases keyboard efficiency and speed

## Activate the Tab Sequence Mode

Select the form to modify and open the Layout window. From the Layout menu, click **Set Tab Sequence**. The menu selection appears as activated, and is indicated with a check mark next to the menu selection. To deactivate the tab sequence mode, remove the check mark by selecting it again from the Layout menu. The first field in the current sequence appears shaded in the window's layout.

## Select the First Field in the Sequence

If the first field you want in the tab sequence is not currently shaded, select it by double-clicking the field. This is the field where the cursor appears when first opening the window. The field you double-click appears shaded, meaning it is now set as the first field in the tab sequence.

## Press the TAB Key

Press the TAB key to see the next field in the new sequence. If you double-clicked on a field in the previous step, the highlight returns to the first field in the old sequence. When a change is made to a window's tab sequence, the new field you select is inserted before the first field in the old sequence. The old field continues to be the next field in the tab sequence until the entire sequence is set.


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### Select the Second Field in the Sequence

Locate the next field in the sequence. Insert the field by double-clicking it. The field appears shaded.

### Press the TAB Key

When you press the TAB key, the highlight returns to the first field in the old tab sequence.

### Select Remaining Fields in the Sequence

Continue to select fields in the window in the order you want, using the mouse to double-click the field and the TAB key to move the highlight to the next object in the sequence.

When finished, test the tab sequence by pressing the tab key several times. The highlight moves from field to field in the sequence set. If the sequence is not set properly, repeat the steps for setting the tab sequence until it is set to the desired order.

Things to consider when working with the tab sequence:

- If you do not want a certain field to be included in the tab sequence, set the TabStop property for that field to false. The TabStop property is set using the **Objects** tab on the Properties window.
- Be sure that each radio button follows the radio group when setting the tab sequence. To make radio buttons work properly in your application, the radio group and radio button fields must be arranged properly in the window. In the tab sequence, the radio group must come immediately before the radio buttons.
- You can encounter a "stacked" fields issue on some Microsoft Dynamics GP windows. For example, any transaction window that supports multi-currency typically has both a **Sales Amount** and **Originating Sales Amount** field. These are placed on top of each other on the form. Make sure you set both fields back to back in the tab sequence.
- Be aware that the tab sequence in some Microsoft Dynamics GP windows can be overwritten by the business logic. The code can place focus to a specific place.
- You can set the tab sequence in an adds allowed and editable scrolling window. This is an important step that must happen for the LineChange event to fire properly.


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### Preview and Save the Modifications

Preview the changes made to the window by selecting LAYOUT→PREVIEW. The form is not functional but displays with your modifications.

Continue making changes to this window using other procedures in this manual, or save the changes to this window by closing the layout. When closing the layout an alert message appears asking you to Save, Discard, or Cancel the changes. If satisfied with the changes to this window, click the **Save** button.

To view all of the changes made with Modifier, return to Microsoft Dynamics GP, and grant access to the modified windows using either the User Class Setup or Security Setup window.

## Adding Graphics to a Window

Graphics used in your business, such as a company logo, pictures, and the symbols you use in day-to-day activities, can be added to the Microsoft Dynamics GP application with standard copy-and-paste techniques. Each of these graphics are stored in Modifier using the picture library. Once a graphic's been added to the library, it is available for use on any of the Microsoft Dynamics GP windows.

Modifier's picture library allows you to add, name, and store specific graphics in Modifier. When storing the graphic, Modifier stores it in a generic format. For example, if modifying windows in a multi-platform environment, you can create an icon using a graphics program, store it in the Modifier's pictures library, and paste it onto several different windows. The graphic appears in Windows the same way as it was created on the other platform.

The following procedure explains the process of adding a graphic to Modifier's picture library and to a window layout.

### Using the Picture Tool

Open the layout area for the window you want to add a graphic to. Select the Picture tool from the Toolbox. Click at the position in the window layout where you want to add the object. A list of existing graphics displays, click the **New** button to create a new picture. To add an existing graphic to the window, highlight a picture from the list of existing graphics and click **OK**.

***NOTE:*** *Selecting Pictures can also add graphics to the picture library from the Resources menu in Modifier.*


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## Enter a Name for the Graphic

If New is selected to create a new picture, when the Picture Definition window opens, specify the name for the graphic. Then click in the picture layout area beneath the **Picture Name** field.

## Copy and Paste the Graphic

After the layout area has been activated, move to the graphics application that contains the picture you want to add to the window. For example, switch to Microsoft Paint. Select or create a graphic within that application, and then select the Copy command from the Edit menu to place it on the Clipboard. Select only the portion of the graphic you want to paste in the window. When finished, switch back to Modifier.

With the Picture Definition window active, click **Paste** from the Edit menu to paste the graphic to the picture layout area.

When the graphic appears, click **OK**. The Pictures window displays with the name of the graphic in the list. Click **OK** to save the changes and close the Pictures window.

## Select the Graphic

Select the graphic from the Pictures list and click **OK**. The picture appears in the window's layout. Then move or resize the object as needed.

## Preview and Save the Modifications

Preview the changes made to the window by selecting LAYOUT→PREVIEW. The form is not functional but displays with the modifications.

Continue making changes to this window using other procedures in this manual, or save the changes by closing the layout. When closing the layout, an alert message appears asking you to Save, Discard, or Cancel your changes. If satisfied with the changes to this window, click the **Save** button.

To view all of the changes made with Modifier, return to Microsoft Dynamics GP, and grant access to the modified windows using either the User Class Setup or Security Setup window. By rearranging fields in a window, you can change the sequence of information data entry personnel enter, ensuring they enter the most important information first. This reduces unnecessary keystrokes and enables users to enter data in a logical order. After rearranging fields in a window, refer to the "Setting a Tab Sequence" procedure to be sure a window's tab sequence reflects the latest changes made to the window.


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## Conclusion

In this chapter you learned that Modifier can be used to customize windows by changing or adding objects to the window. The layout of the window can be customized to add additional fields from the auto-linked table and new local fields can be created and placed on the window. You learned how to customize a scrolling window and add text for fields added to both windows and scrolling windows. Setting a new tab sequence for a window was also discussed.

# Lab 3.1 – Modifying Individual Window Prompts

*Company: Fabrikam, Inc.*

**Scenario:** This exercise goes through the process of changing several prompts in the Company Setup Window's layout, as well as repositioning prompts and changing their color, font, and style.

## Challenge Yourself!

- Navigate to the Company Setup window, and use the following information to customize the window:

- Change the text prompts to display Category 1 and Category 2.
- Change the modified text prompts so they appear bold and pink.
- Validate your changes by viewing the window within Modifier.
- Allow the appropriate users to access this customized window.


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## Need a Little Help?

- Navigate to the Company Setup window, and use the following information to customize the window. Open this window from the Microsoft Dynamics GP application from the Company option on the Tools menu. You can also use Modifier to open the form definition window using the Technical name, which is SY_Company_Options.
- Using the static text tool, change the User Defined text prompts to display Category 1 and Category 2.

- Using the properties window, change the modified text prompts so they appear bold and pink.
- Validate your changes by viewing the window within Modifier.
- Save the changes you made.
- Return to the Microsoft Dynamics GP application, and grant security to the Modified window using the Security Setup window.

# Lab 3.2 – Modifying Field Displays

*Company: Fabrikam, Inc.*

**Scenario**: This lesson goes through the process of modifying a window by changing how fields display information in the window. You have determined that the information displayed in the Company Addresses window is important for your data entry personnel to view, but you do not want to allow them to change certain information displayed for your company's multiple locations.

## Challenge Yourself!

- Navigate to the Company Address Setup window, and use the following information to customize the window:

- Because you do not want certain users to have the ability to change or delete information in this window, change all fields to be non-editable fields except the **Address ID** field, the **Name** field, and the **Clear** button. These non-editable fields should also be excluded from the tab sequence.
- Validate your changes by viewing the window within the Modifier.
- Allow the appropriate users to access this customized window.


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## Need a Little Help?

- Navigate to the Company Addresses Setup window. To access this window, navigate to the Company Setup window and use the **Address** button to open the Company Addresses Setup window. You can also open this form and window within Modifier using the Technical name, which is SY_Company_Location.
- Because you do not want certain users to have the ability to change or delete information in this window, select the appropriate fields and assign the properties as indicated:

| | |
|---|---|
| **Editable** | False |
| **TabStop** | False |

- Validate your changes by viewing the window within Modifier.
- Return to the Microsoft Dynamics GP, and grant security to the modified window using the Security Setup window. (Security might already be set if a previous project was done by changing the opening position of this window.)

# Lab 3.3 – Adding Fields to a Window

*Company: Fabrikam, Inc.*

**Scenario**: This lesson goes through the process of modifying a window by adding a field from the table that is linked to the window and by adding a new field that you can use later with Visual Basic for Applications. For this lesson, you add a new string field and a field from the RM_Customer_MSTR table to the Customer Maintenance window. You also create prompts for these new fields.

## Challenge Yourself!

- Use the following information to customize the Customer Maintenance window:

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- Add the **Tax Registration Number** field to the window from the auto-linked table.
- Move the status area down to make room for the **Email Address** field. Add a local string field called **Email Address** to the window layout. The keyable length for the string should be 20.
- Add text prompts for the two fields that were added to the layout. Set the appropriate properties so they display the underline.
- Link the two new fields to their text prompts.
- Change the tab sequence of the window so that the cursor stops at the new fields on the window. Since the Tax Registration Number is a non-editable field, it does not need to be included in the tab sequence.
- Validate the changes by viewing the window within the Modifier.
- Allow the appropriate users to access this customized window.

***NOTE:*** *Data is not displayed in the* ***Email Address*** *field until code is written using Visual Basic for Applications (VBA) to handle this information.*

## Need a Little Help?

- Navigate to the Customer Maintenance window. You can also open this form and window within Modifier using the Technical name which is RM_Customer_Maintenance.
- Add the Tax Registration Number to the window layout from the auto-linked table.
- Move the status area down to make room for the Email Address field. Add a local string field called Email Address to the window layout. The keyable length for the string should be 20.

- Add text prompts for the field that was added to the layout. Set the appropriate properties so they display the underline.

| | |
|---|---|
| **Appearance** | 3D Highlight |
| **Border** | True |

- Select Link Prompt from the Tools menu, and link the two new fields to their text prompts.
- Change the tab sequence of the window so that the cursor stops at the new fields on the window. Since the Tax Registration Number is a non-editable field, it does not need to be included in the tab sequence.
- Validate the changes by viewing the window within Modifier.
- Return to Microsoft Dynamics GP, and grant security to the Modified window using the Security Setup window. (Security might already be set if a previous project was done by changing the opening position of this window.)

***NOTE:*** *Data is not displayed in the* ***Email Address*** *field until code is written using Visual Basic for Applications (VBA) to handle this information.*


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# Lab 3.4 – Adding Fields to a Scrolling Window

*Company: Fabrikam, Inc.*

**Scenario**: This lesson goes through the process of modifying a window by adding a field from the table that is linked to the scrolling window. For this lesson, you add a **Comment** field from the IVC_HDR_WORK table to the Invoicing Document Inquiry window. You add the field to the Big Line Item section of the scrolling window. You also create a text prompt for this field.

## Challenge Yourself!

- Navigate to the Invoicing Document Inquiry window, and use the following information to customize the window:

- Open the layout for the scrolling window.
- Make the big line item section area larger so the **Comment** field can be added.
- Add the **Comment** field to the big line item area of the scrolling window. Place it below the other fields on the window.

- Select the appropriate properties for the **Comment** field so the color matches the other fields in the big line item area. Also turn the border of the comment field off.
- Using the Line Tool, draw a horizontal line under the **Comment** field.
- Add a text prompt above the scrolling window identifying the **Comment** field that has been added.
- Validate your changes by viewing the window within Modifier.
- Allow the appropriate users to access this customized window.

## Need a Little Help?

- Navigate to the Invoicing Document Inquiry window. You can also open this form and window within Modifier using the Technical name which is IVC_Transaction_Inquiry.
- Open the layout for the scrolling window.
- Using the Big Line Item selection under the Tools menu, make the big line item section area larger so the **Comment** field can be added.
- Add the **Comment** field to the big line item area of the scrolling window. Place it below the other fields on the window.
- Select the appropriate properties for the **Comment** field so the color matches the other fields in the big line item area.

| | |
|---|---|
| **BackColor** | Yellow |
| **Border** | False |
| **Pattern** | 75% Shading |
| **Size-Width** | 580 |

- Using the Line Tool, draw a horizontal line under the **Comment** field. The big line item area should look as follows:

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- Add a text prompt above the scrolling window identifying the **Comment** field that has been added.

- Validate the changes by viewing the window within Modifier.
- Return to Microsoft Dynamics GP, and grant security to the Modified window using the Security Setup window.

## Quick Interaction: Lessons Learned

Take a moment and write down three Key Points you have learned from this chapter:

1.

2.

3.



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