

User Customizations

DreamApps allows individual users to customize forms to suit their personal needs

Who

By default all users can customize the forms they have access to, and link or copy customizations shared by other users. Users can be selectively restricted from doing so by setting the Self-customization flag in the page Users in System Administration. The flag can be set for all users in a business by setting the flag in the page Business in System Administration.

What

Currently, the users can customize content by hiding or showing individual fields and/or changing field captions.

How

Each page/tab displays a generic Settings icon 

When the user hovers over the icon, the settings menu is exposed.

Here are the options:

- **Organize** - Apply customizations to the page.
- **Share** - Share your customizations so that others can link to or copy from them.
- **Link** - Link to customizations of other users. This creates a dynamic link to the other user's customizations. Any future changes to those would automatically be inherited by the current user.
- **Copy** - Copy from customizations of other users. This copies the customizations from another user as a snapshot and the current user can make further changes. Any future changes by the other user will have no effect on the current user.
- **Restrict** - Disallow sharing.
- **Unlink** - Remove links.
- **Clear** - Clear customizations.

Selecting *Organize* transforms the page into a **Customization Canvas** allowing the user to apply customizations to that page. Clicking on rest of the options pops up a **Utility Window** to act on. Here are the details:

Customization Canvas

The customization canvas is an editable page for editing custom captions and showing/hiding fields.

Here is an example:

Home asok@dreamapps.com for HomePro **Save Settings**

PO Details Inventory Supplier Depot Milestones **My Open POs** Empty Open Under Process Held Completed Closed

Purchase Order

Select checkboxes to hide respective fields.
Enter text in boxes above captions to customize them.

BarCodes
 Approve
 Revise
 Create GRIN
 Undo
 Supplier
 Depot
 Show
 Add
 Update
 Delete
 Hold
 Release
 Close

Top
 Previous
 Next
 Bottom
 Clear
 History

Delivery Option:

Suppliers with Pending Requisitions

Supplier Number	Name	Supplier Number	Name	Supplier Number	Name
Blank		SUP-000002	S & S CO-ORDINATOR PTE LTD	SUP-000003	T & T PTE LTD
SUP-000001	A & P CO-ORDINATOR PTE LTD	SUP-000003		SUP-000006	TOF SYSTEMSENGG PTE LTD

<input type="checkbox"/> PO Number <input type="text" value="BBPO"/> <input type="checkbox"/> Purchase Order Number	<input type="checkbox"/> Purchase Date <input type="text" value="[Unknown]"/> <input type="checkbox"/> Date
<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> Supplier Number	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> Name
<input checked="" type="checkbox"/> <input type="text"/> <input type="checkbox"/> Supplier Reference	<input checked="" type="checkbox"/> <input type="text" value="[Unknown]"/> <input type="checkbox"/> Supplier Ref Date
<input type="checkbox"/> <input type="text" value="[Select]"/> <input type="checkbox"/> Currency	<input type="checkbox"/> <input type="text" value="0E,-10.0000000000"/> <input type="checkbox"/> Exchange Rate
<input type="checkbox"/> <input type="text" value="[Select]"/> <input type="checkbox"/> Division	<input type="checkbox"/> They <input type="text" value="[Select]"/> <input type="checkbox"/> Section
<input type="checkbox"/> <input type="text" value="[Select]"/> <input type="checkbox"/> Project	<input type="checkbox"/> <input type="text" value="0.00"/> <input type="checkbox"/> Total Amount
<input type="checkbox"/> <input type="text" value="0.00"/> <input type="checkbox"/> Approved Amount	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> PO Flag
<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> GRNs	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> Sis
<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> GRN Vouchers	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> SI Vouchers
<input checked="" type="checkbox"/> <input type="text"/> <input type="checkbox"/> Notes	
<input checked="" type="checkbox"/> <input type="text"/> <input type="checkbox"/> Header Message	
<input checked="" type="checkbox"/> <input type="text"/> <input type="checkbox"/> Footer Message	
<input type="checkbox"/> <input type="text" value="[Select]"/> <input type="checkbox"/> Team	<input type="checkbox"/> <input type="text" value="[Select]"/> <input type="checkbox"/> Team Member
<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> Manager	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> International Commercial Terms

Notice that the Settings icon  on the top right corner has been replaced by a **Save Settings** button.

Click on the button after changes to save them.

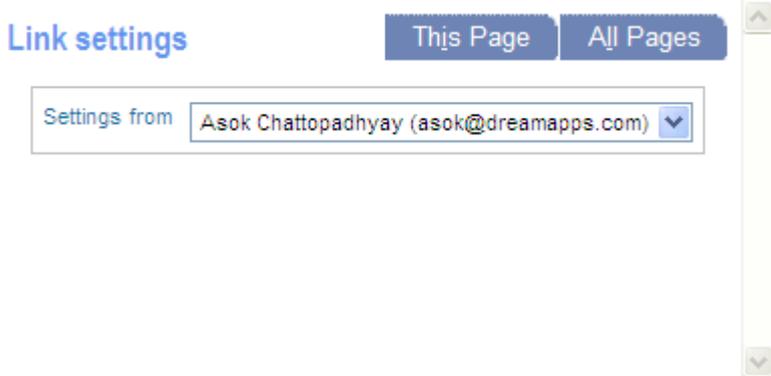
Utility Window

The utility window allows you to specify sharing, linking, copying, restricting, un-linking and clearing customizations. It has two buttons - one, that would affect only the current page and the other, all pages.

Link settings

This Page **All Pages**

Settings from **Asok Chattopadhyay (asok@dreamapps.com)**



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