

Details - Page Layouts

Last Modified on 11/22/2017 4:32 pm EST

This article will guide you through the various options available for setting up your Details screens exactly the way you want.

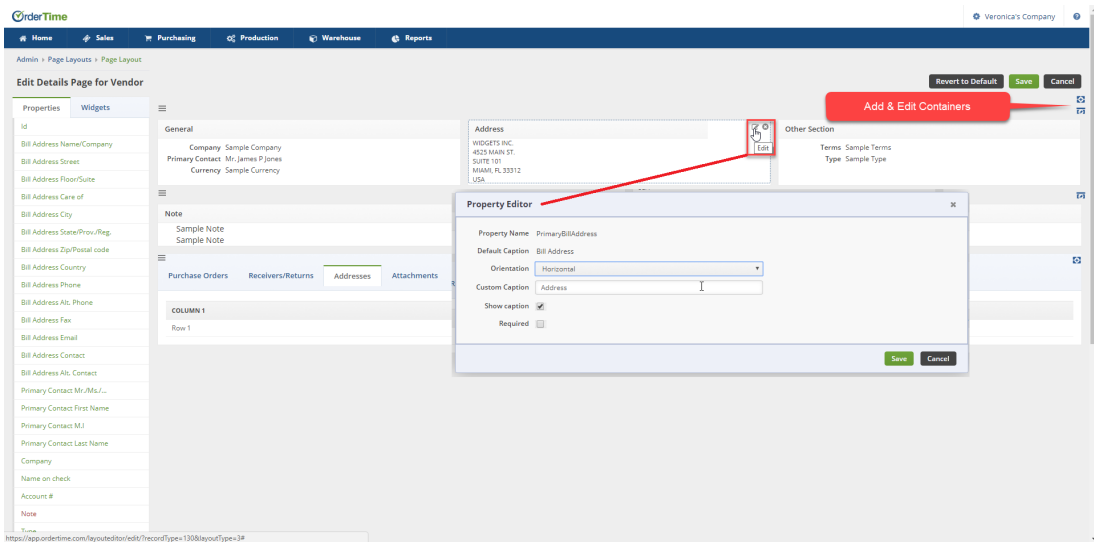
In the Edit Details Page you will find the *Container Sections* and *Tab Container Sections* that will allow you to modify the information you see when looking at the Details for various Entities and/or Transactions of your choosing.

The screenshot displays the 'Edit Details Page for Vendor' in the OrderTime system. The interface is divided into several sections:

- Navigation:** Top bar with 'Home', 'Sales', 'Purchasing', 'Production', 'Warehouse', and 'Reports'. A user profile for 'Veronica's Company' is visible in the top right.
- Properties:** A left sidebar with a list of properties for editing, including 'Id', 'Bill Address Name/Company', 'Bill Address Street', 'Bill Address Floor/Suite', 'Bill Address Care of', 'Bill Address City', 'Bill Address State/Prov./Reg.', 'Bill Address Zip/Postal code', 'Bill Address Country', 'Bill Address Phone', 'Bill Address Alt. Phone', 'Bill Address Fax', 'Bill Address Email', 'Bill Address Contact', 'Bill Address Alt. Contact', 'Primary Contact: Mr./Ms./...', 'Primary Contact: First Name', 'Primary Contact: M.I.', 'Primary Contact: Last Name', 'Company', 'Name on check', 'Account #', 'Note', and 'Type'.
- Container Section:** A section titled 'Container' with three sub-sections: 'General' (Company: Sample Company, Primary Contact: Mr. James P Jones, Currency: Sample Currency), 'Address' (WIDGETS INC., 4523 MAIN ST., SUITE 101, MIAMI, FL 33312, USA), and 'Other Section' (Terms: Sample Terms, Type: Sample Type).
- Tab Container Section:** A section titled 'Tab Container' with a tabbed interface. The active tab is 'Purchase Orders'. Below the tabs is a table with three columns: 'COLUMN 1', 'COLUMN 2', and 'COLUMN ...'. The table contains two rows: 'Row 1' and 'Row 2'.


Container Sections

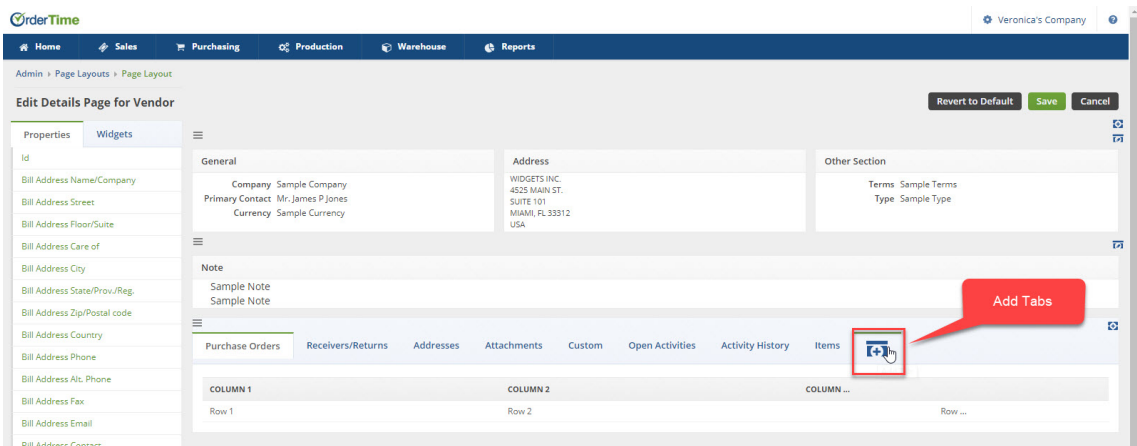
Add more containers and/or *Edit* the number of columns on existing containers allowing for efficient data entry when in the Details section. Each Column Header can also be modified to make it *Required* information, *change the orientation*, and create a *Custom Caption* in the Property Editor.



Tab Container Sections

Additional Tabs can be added to the Tab Containers. After creating the New Tab you will add containers to that Tab. Those Container Column Headers can also be modified to make it *Required* information, *change the orientation*, and create a *Custom Caption* in the Property Editor.

 **Restriction: Only one Tab Container is allowed in the Details Page Layout.**



Your browser does not support HTML5 video.

Rearrange the Containers & Tabs

You can drag and drop to rearrange the container sections and the tabs.

Your browser does not support HTML5 video.

Properties and Widgets

Organize your information in the containers by using the *Properties* and *Widgets* options on the left hand side of the screen to drag and drop into the Sections.

- **Properties** are the list of attributes that can be added to the Container Sections.
- **Widgets** are a set of properties that can be added all together i.e. Address



Restriction: You can not drag and drop into the grids.

Your browser does not support HTML5 video.

Revert to Default

Use the 'Revert to Default' button if you do not like your changes and want to revert back to the original page layout you started with.

Final Review

You will have rearranged the Container Sections in the order you want, renamed the columns, added new tab to the Tab Container and added Properties and Widget to our sections. Now your Details Screen will look like you want.

Create New
Open Full List

Poly Source EDIT

Recent Records

Rearranged Sections

PO Source
ABC Parts

Note
Purchase Orders Attachments Receivers>Returns Custom Addresses Open Activities Additional Tab Activity History Items

Added New Tab

Rearranged Tabs

General

Company
Primary Contact
Currency

Added Properties

Renamed Columns

Address
70 EDWINMAN ST
WINDRO, CT 06074

Check Name

Other

Terms
Type