

### Move Report Layouts and Group into Folders

You can now move report layouts outside their default folders. This can be useful if you have lots of reports and want to group them into subfolders.

Using this feature you can:

- Create a subfolder for reports inside their current folder
- Create a subfolder for reports inside a module folder
- Create your own folder containing reports across different modules
- Add a layout to the top of the reports tab, above the module folders.

You can change the layout position in the Navigator by editing the Layout Name when you Edit Layout. A backslash \ in the Layout Name indicates a subfolder. A leading backslash \ starts from the root of the Report tab, and Module acronyms can be used for main module report folders. You can determine where the report is positioned within a subfolder using Navigator Ordering.

**\LayoutName** will move the layout to the REPORTS > folder

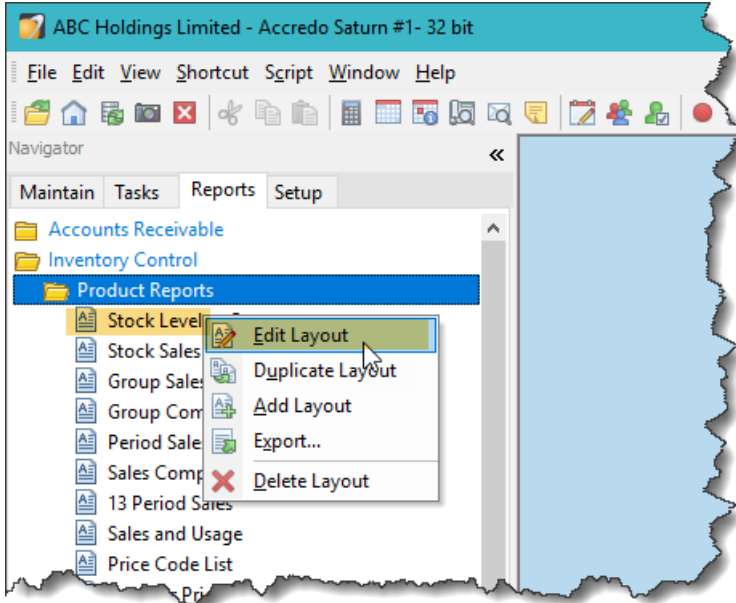
**\FolderA\LayoutName** will move the layout to REPORTS > FOLDERA folder


**\AR\FolderB\LayoutName** will move the layout to the REPORTS > AR > FOLDERB subfolder

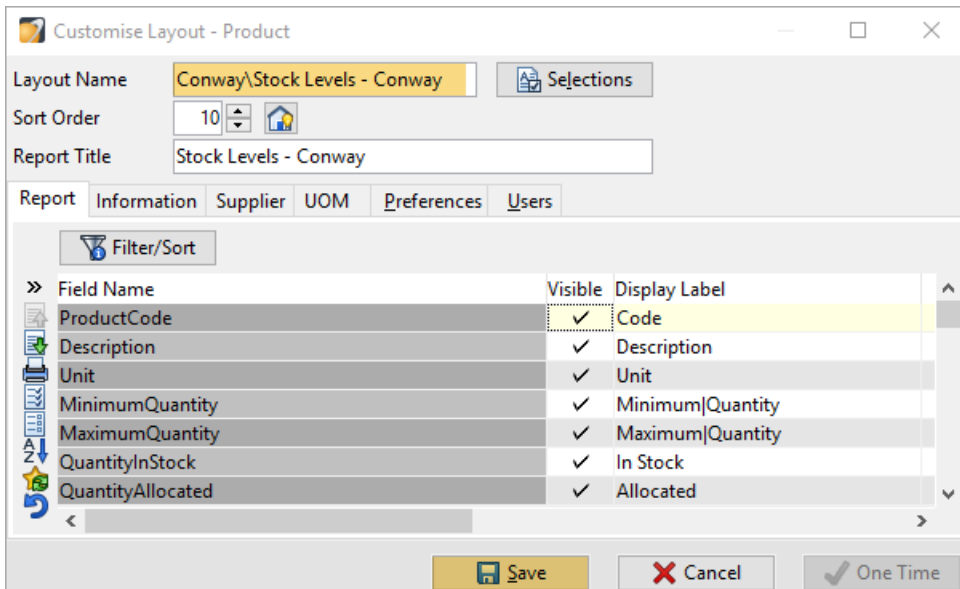
**FolderC\LayoutName** will move the layout to subfolder FOLDERC in the report's current folder, such as REPORTS > AR > CUSTOMER REPORTS > FOLDERC

To move a report to a new folder inside the current folder:

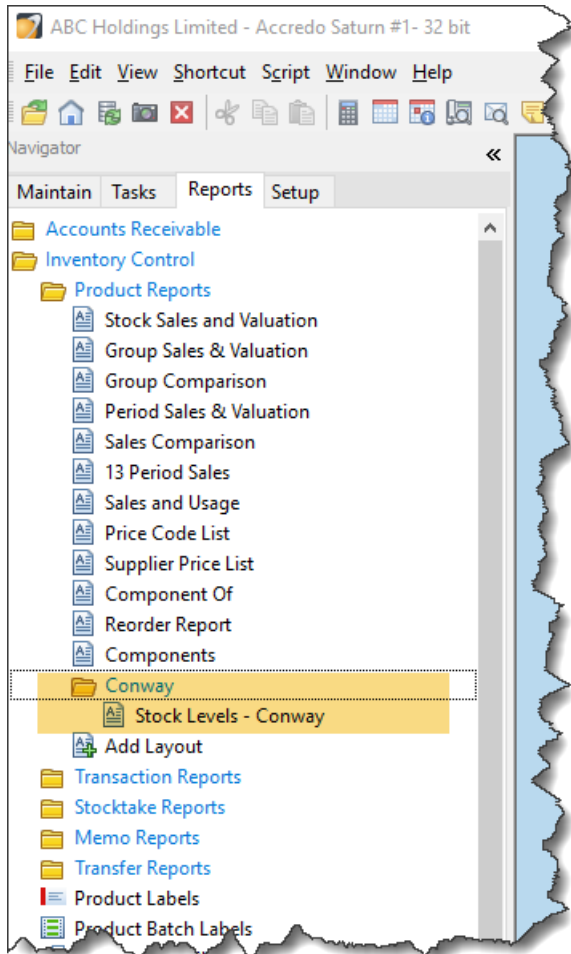
1 Right-click on the report to move then click **Edit Layout**.



2 In the LAYOUT NAME field enter the new folder name followed by a backslash \, then the existing Layout Name. Click  **Save** (F9).

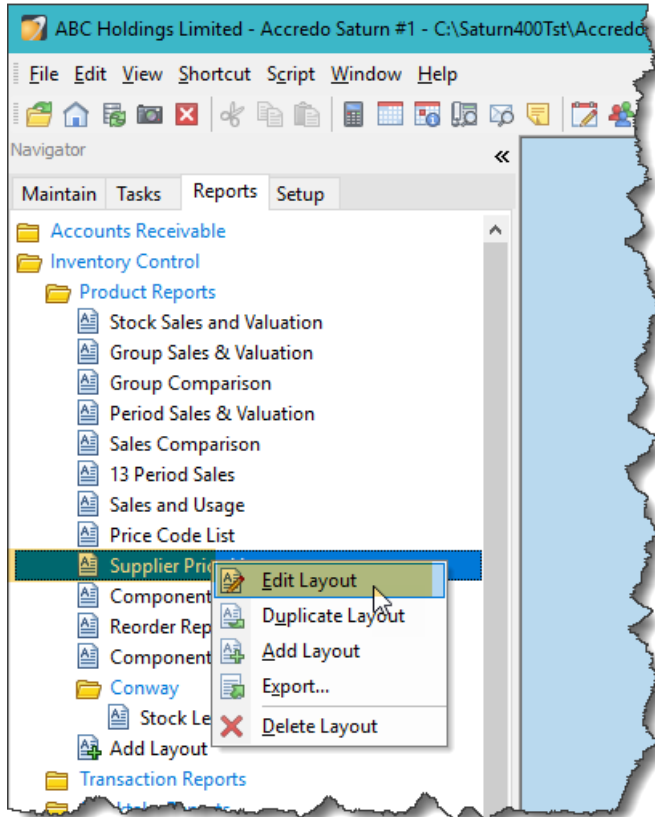


The Report has moved from its original location is now in the new Folder.



To move another Report to the same Folder and change the Navigator ordering:

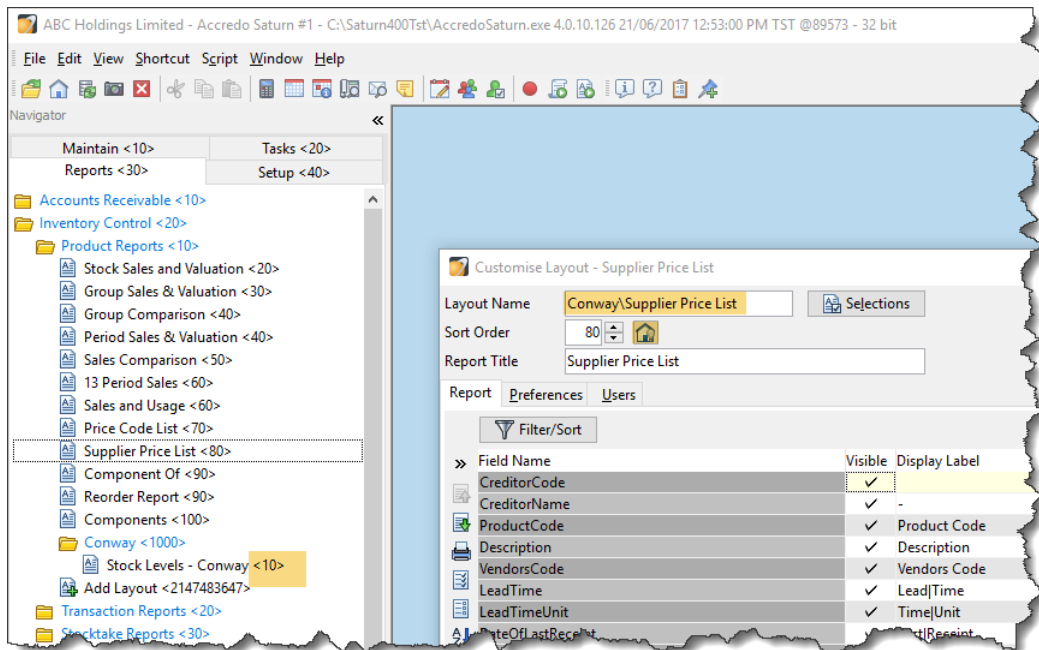
**1** Right-click on the report to move and click **Edit Layout** as before.




**2** In the LAYOUT NAME field enter the same folder name then a backslash \ in front of the Layout Name.

Click  **Display Navigator Item Ordering** (Ctrl+H) to show the ordering in the Navigator.

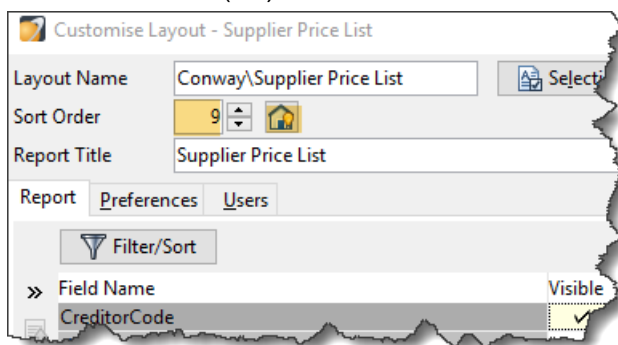
You can see that the previous report added to the Conway folder is positioned at 10, and this report is positioned at 80 which means it will be displayed below the other report.



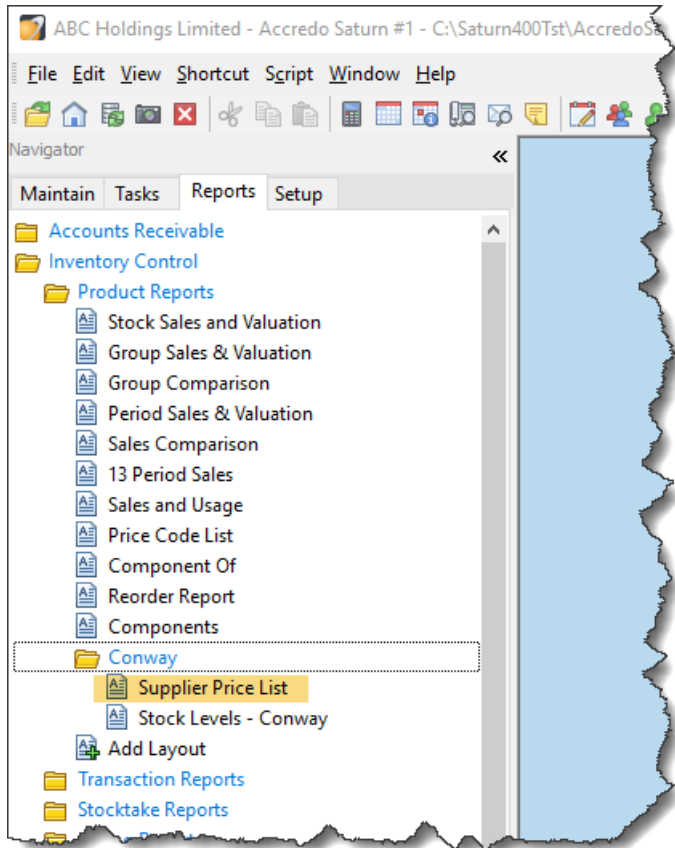
**3** Change the SORT ORDER number so it is lower than the Navigator Order number for the previous report, so in this case it will be a number lower than 10.

Click  **Hide Navigator Item Ordering** (Ctrl+H) to hide the ordering in the Navigator.

Click  **Save** (F9).

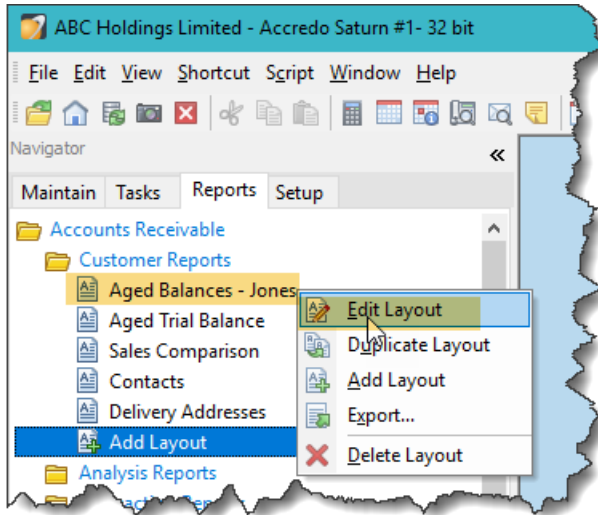



The Report has been moved to the new subfolder, and is shown above the previous report.

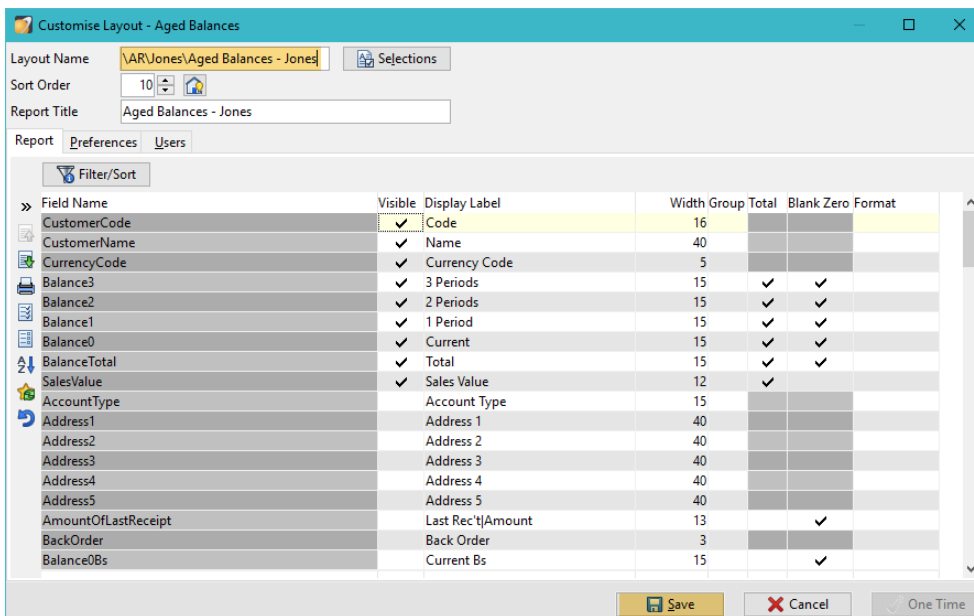


To move reports to a subfolder inside a module folder:

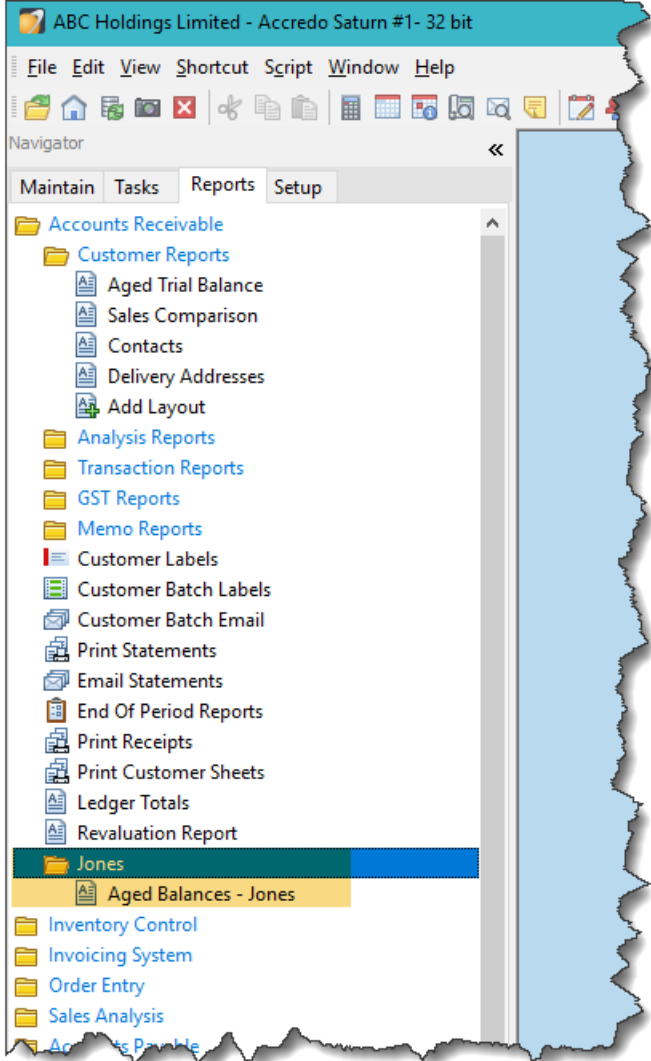
1 Right-click on the report to move and click **Edit Layout**.



2 In the Layout Name field enter `\{Module acronym}\{Folder name}` in front of the **Layout Name**, then click  **Save (F9)**.



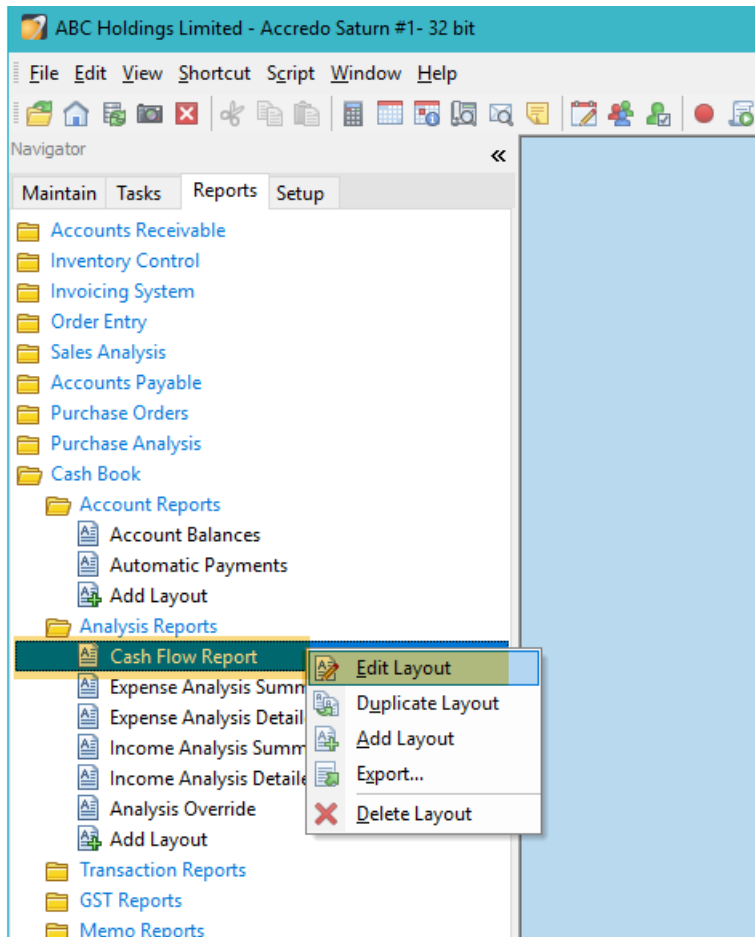
The Report has been moved from its original location and placed inside the subfolder under the Module.





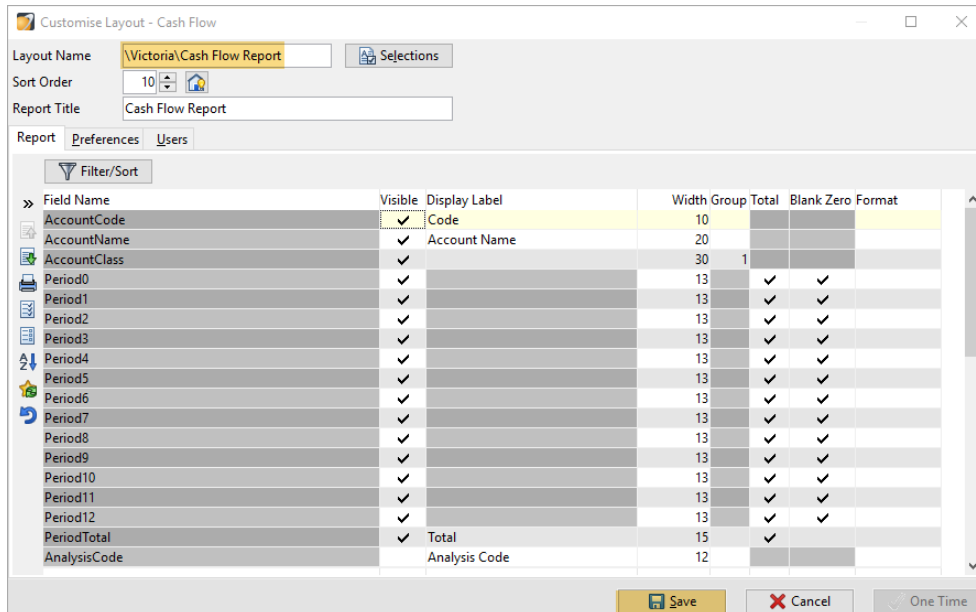
To move reports across different Modules to your own folder:

1 Right-click on the report to move and click **Edit Layout**.

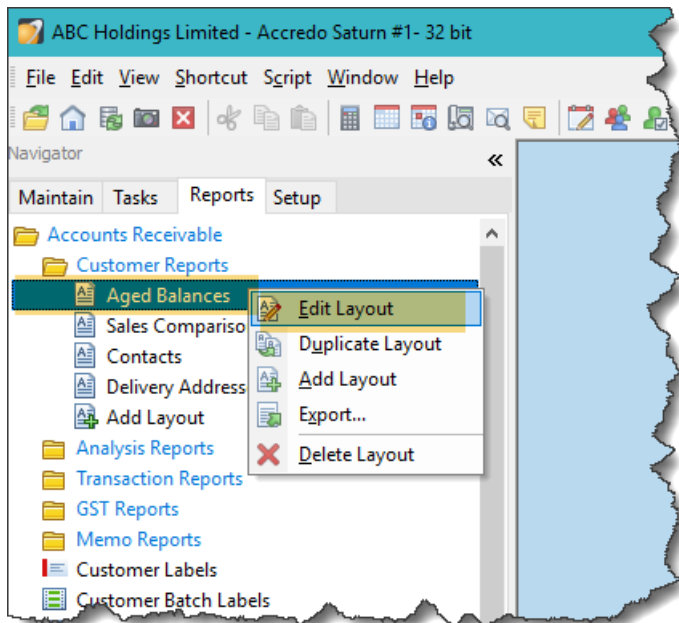



2 In the LAYOUT NAME field enter `\{Folder Name}\` in front of the Layout Name, then click

 **Save** (F9).





3 Right-click on another report to move and click **Edit Layout** as before.



4 In the LAYOUT NAME field enter the same folder name, followed by a backslash \ then the Layout Name. Click  **Save** (F9).

Customise Layout - Aged Balances

Layout Name:  




Sort Order:  

Report Title:

Report Preferences Users

Filter/Sort

Field Name	Visible	Display Label	Width	Group Total	Blank Zero	Format
CustomerCode	<input checked="" type="checkbox"/>	Code	16			
CustomerName	<input checked="" type="checkbox"/>	Name	40			
CurrencyCode	<input checked="" type="checkbox"/>	Currency Code	5			
Balance3	<input checked="" type="checkbox"/>	3 Periods	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Balance2	<input checked="" type="checkbox"/>	2 Periods	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Balance1	<input checked="" type="checkbox"/>	1 Period	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Balance0	<input checked="" type="checkbox"/>	Current	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BalanceTotal	<input checked="" type="checkbox"/>	Total	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SalesValue	<input checked="" type="checkbox"/>	Sales Value	12	<input checked="" type="checkbox"/>		
AccountType		Account Type	15			
Address1		Address 1	40			
Address2		Address 2	40			
Address3		Address 3	40			
Address4		Address 4	40			
Address5		Address 5	40			
AmountOfLastReceipt		Last Rec't Amount	13		<input checked="" type="checkbox"/>	
BackOrder		Back Order	3			
Balance0Bs		Current Bs	15		<input checked="" type="checkbox"/>	

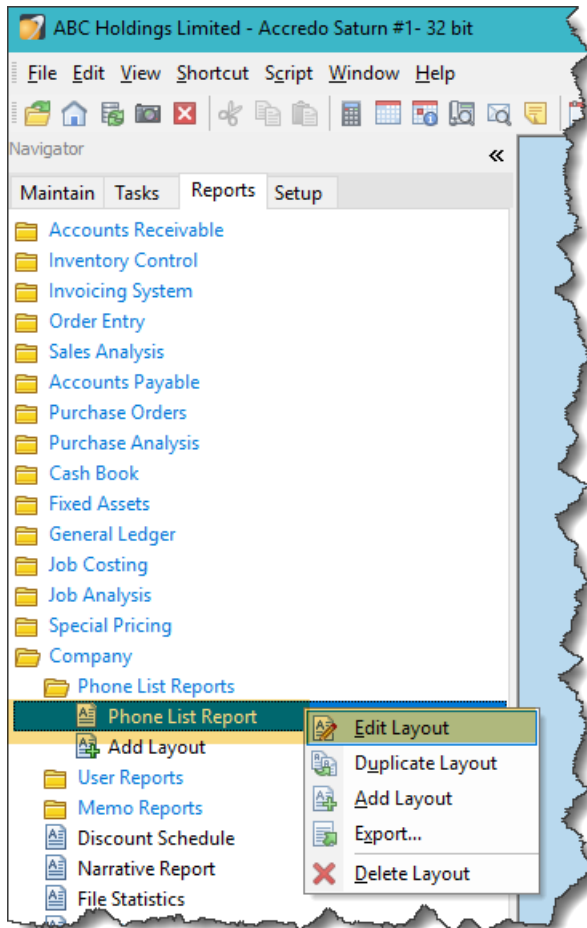
 Save  Cancel  One Time


The reports have been moved from their original locations and placed inside the subfolder under the Reports Tab.

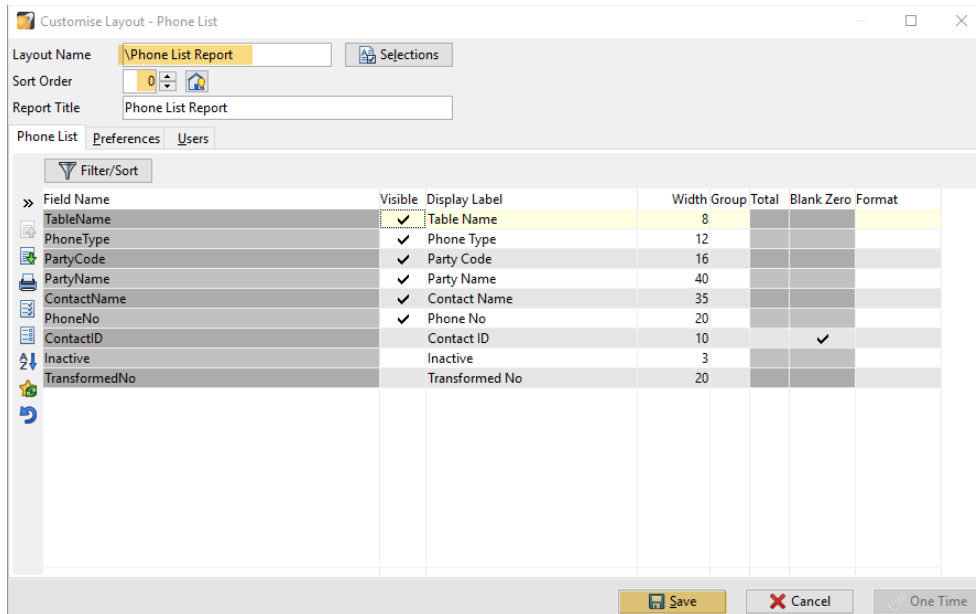


To move a Layout to the Top of the Reports Tab above the Module Folders:

**1** Right-click on the report to move and click **Edit Layout**.



2 In the LAYOUT NAME field enter backslash \ in front of the Layout Name and set the SORT ORDER to 0, so the report will appear at the very top of the Reports Folder. Click  **Save** (F9).



The report has been moved from its original location and placed under the Reports Tab.

