



*Helping American Manufacturing become more profitable and successful for over 30 years!*

## CSI (SyteLine) Tips and Techniques Newsletter

Information to Help You

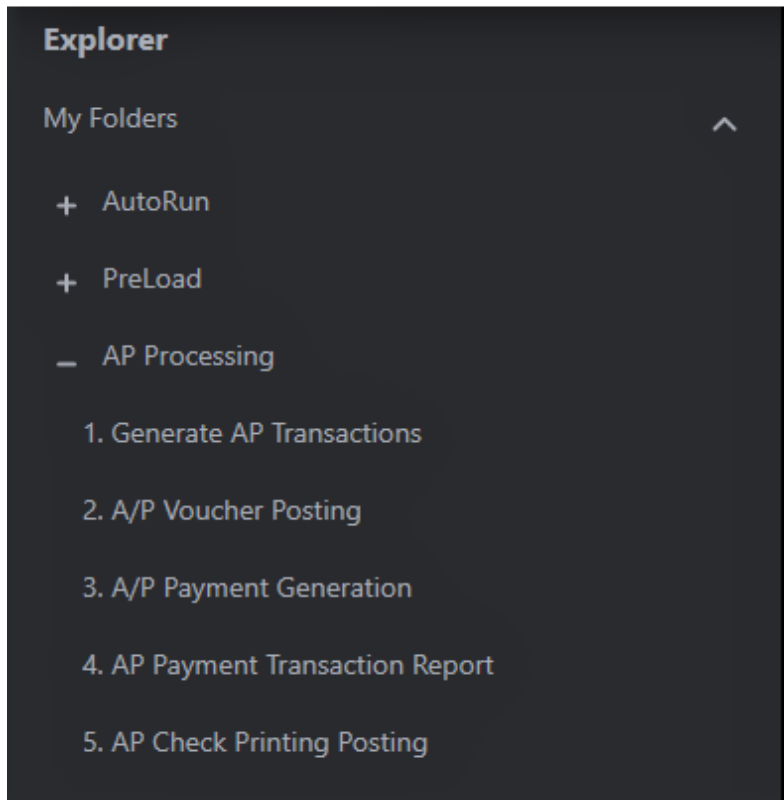
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### Creating Your Own Personal Menu

Did you know that you can create your own personal menu in CSI/SyteLine with those forms you use frequently? You can even rename and order these forms for activities you do frequently. This can be very handy and speed your navigation through the system.

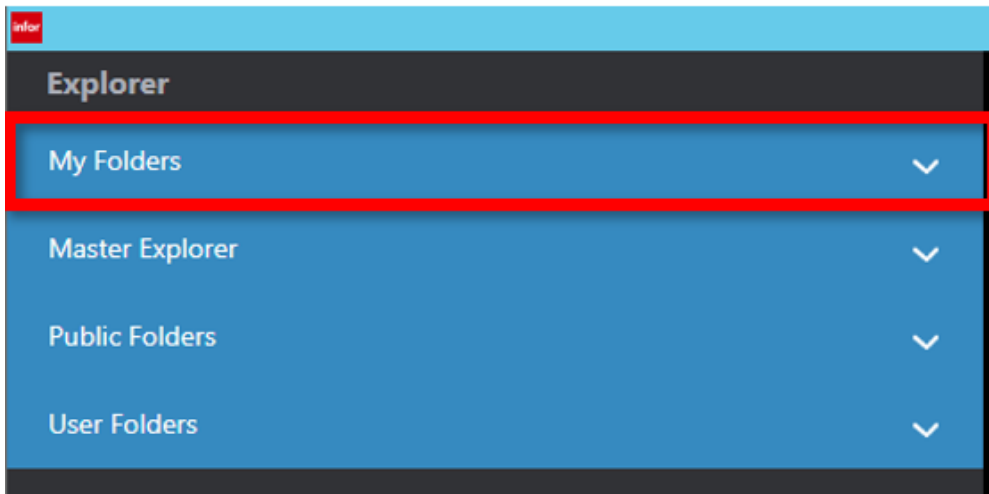
For example, let's say you are the AP Manager and frequently step through the actions of creating a vendor voucher, posting voucher, selecting checks for payment and doing the check run. You can create your own set of steps in your folder in the Explorer to make it quick and easy to perform these functions. Mine looks like this:

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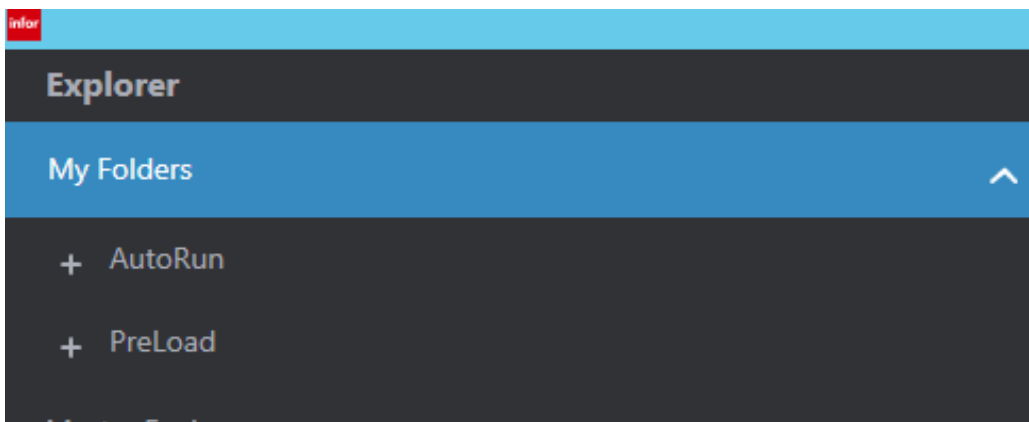
Here's how to do it:

Under the Explorer menu you have a section titled "My Folders":

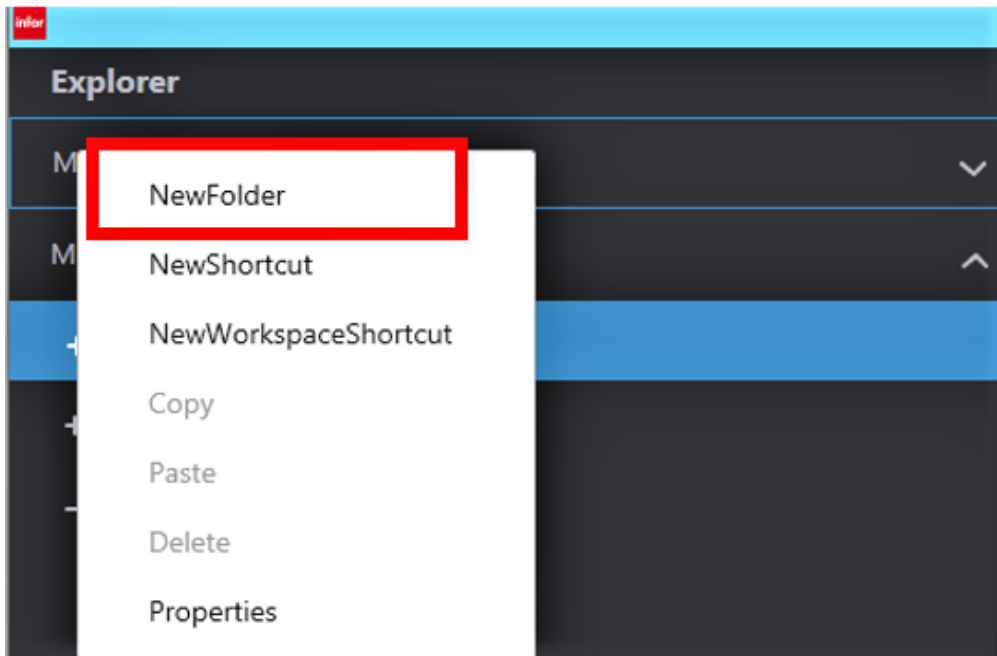


First, let's create a sub-folder for your AP Processes.

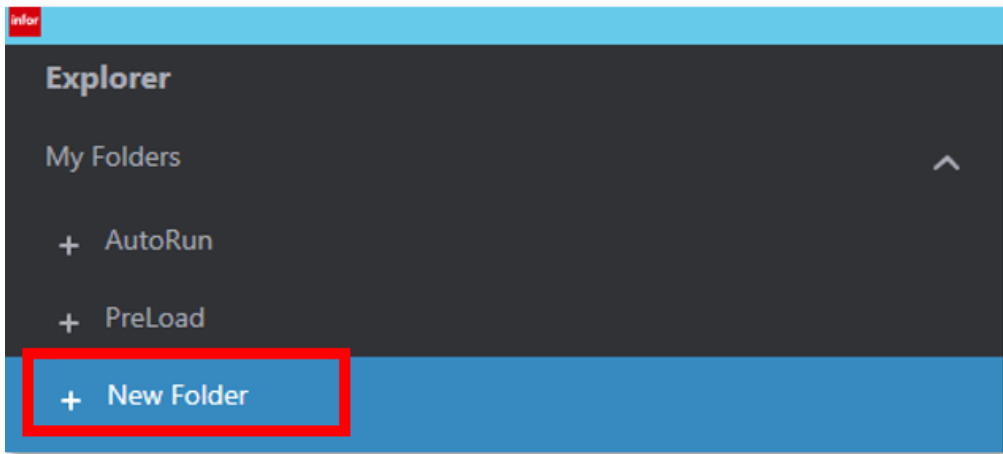
1) Click the down arrow to the right of My Folders to expose the content of that folder. You'll likely see a couple of system folders called "AutoRun" and "PreLoad". You can ignore these for now.



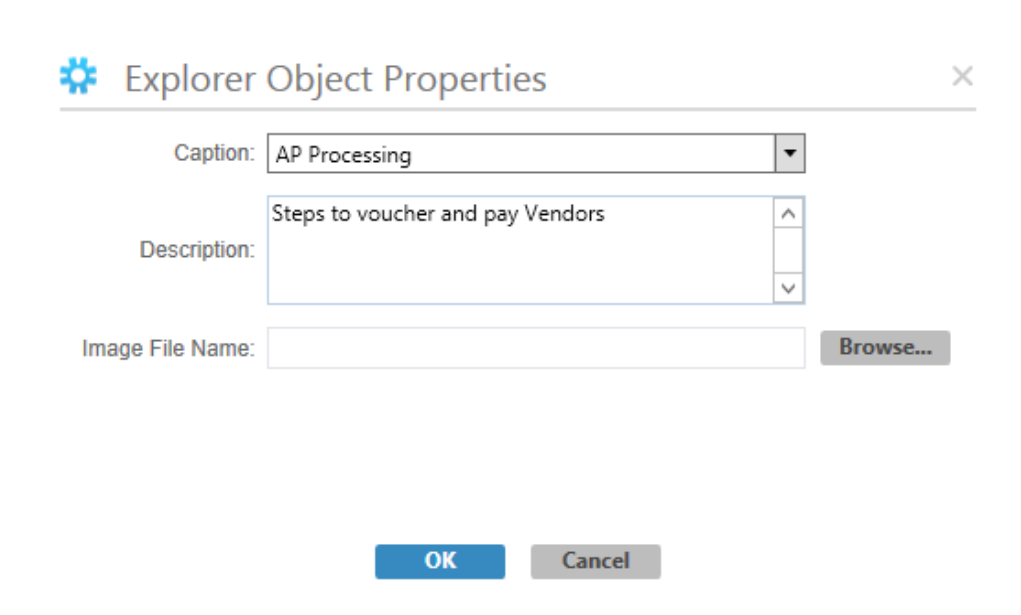
2) Right click on My Folders and select "New Folder".




3) You'll now see a new folder under "My Folders" called "New Folder".

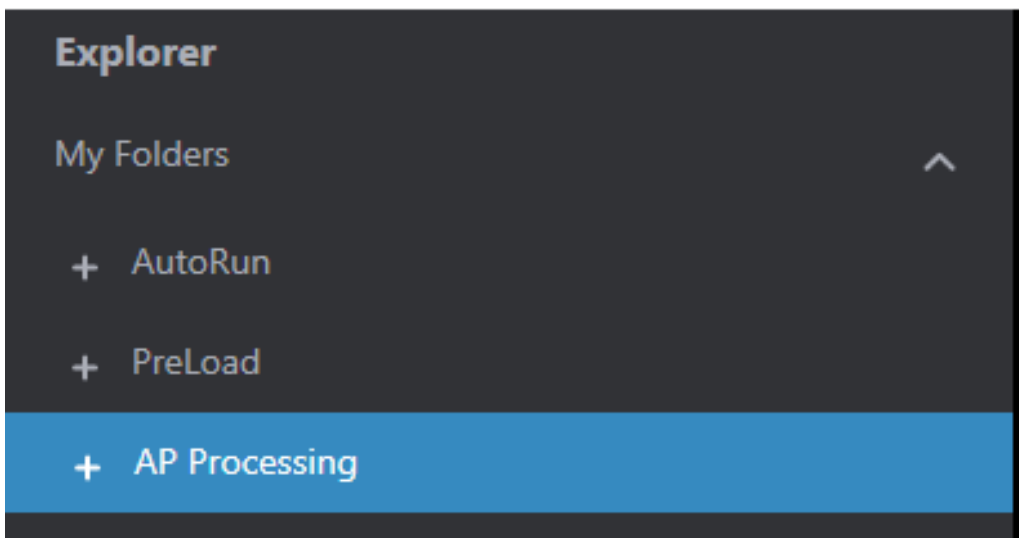


4) Right Mouse Click on the "New Folder" and select "Properties" from the menu. This will open the "Explorer Object Properties" dialog box. Change the Caption from "New Folder" to "AP Processing". You can optionally put in a description for your new folder.

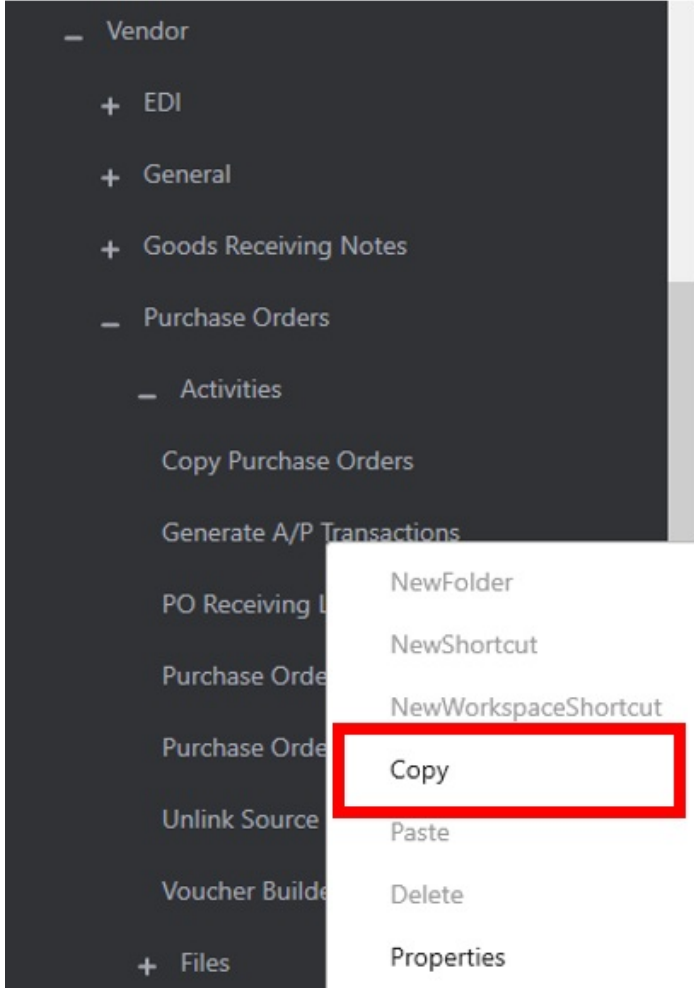


5) You should now see your "AP Processing" folder in My Folders:

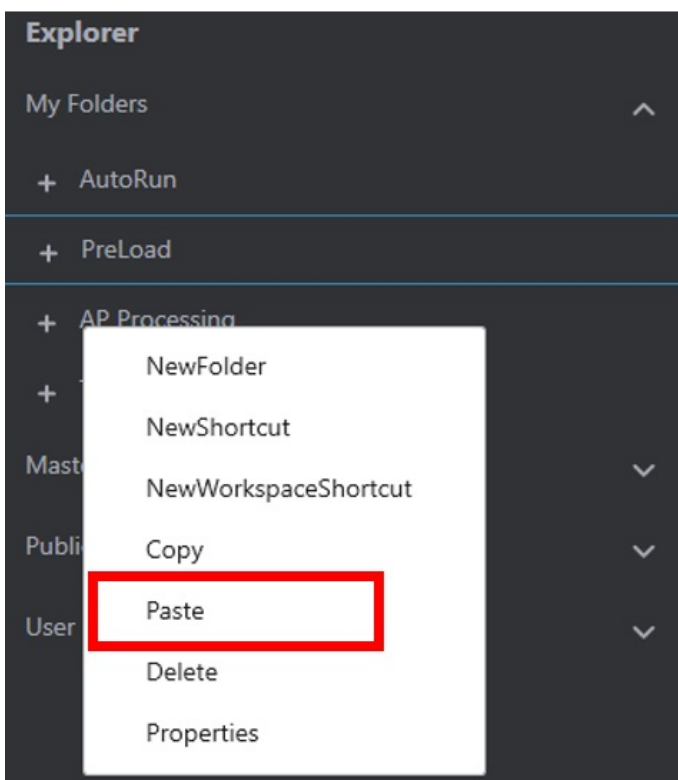
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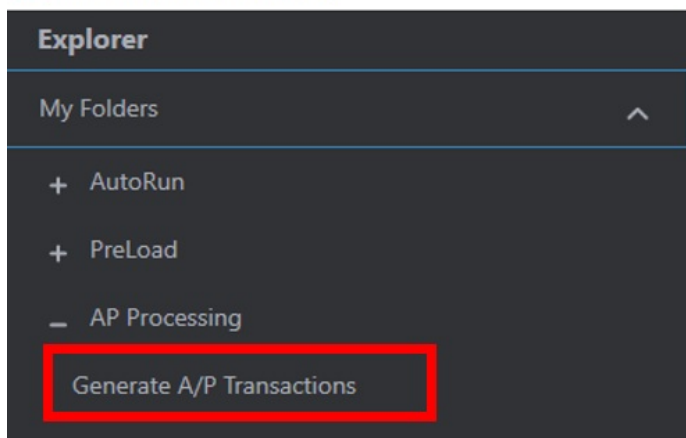
6) Now, we're going to copy the forms you use for AP Processing into the new folder. In your Explorer, open Master Explorer → Modules → Vendors → Purchase Orders → Activities. Right-click on "Generate AP Transactions" and select copy from the drop-down list:



7) Now navigate back up to the top of the Explorer, open My Folders and right click on your AP Processing folder. Select "Paste" from the drop down:



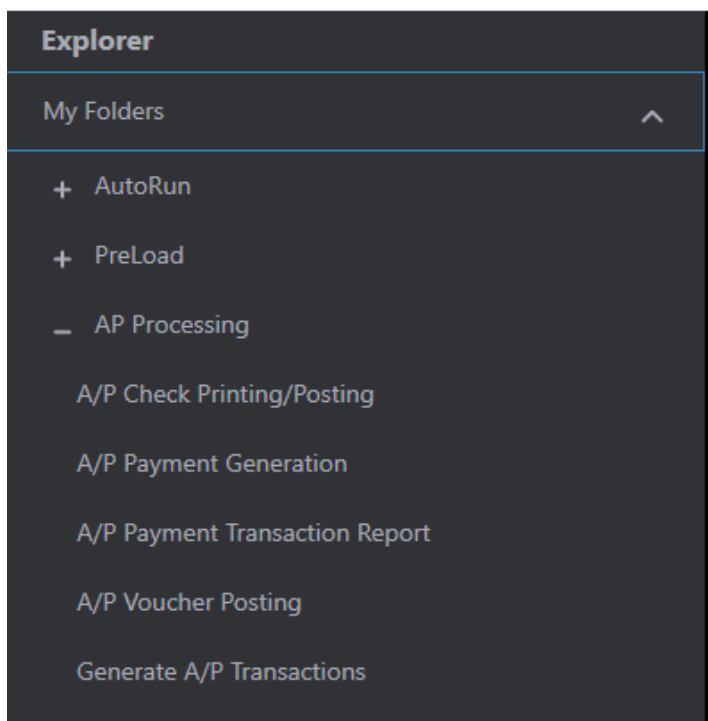
8) You should now see "Generate A/P Transactions" listed under your My Folders section:



9) Find these other forms in your Master Explorer and paste them into your “AP Processing” folder as we did above:

- A/P Check Printing/Posting
- A/P Payment Generation
- A/P Payment Transaction Report
- A/P Voucher Posting

You should now see your new folder with the above forms looking like this:



10) That’s great, but the forms are in the wrong sequence. I’d like to list them in the sequence I take to process A/P. To do this, we just modify the property of each form and put a number in front for the right sequence. Right-click on “Generate A/P Transactions and select Properties from the menu. Type over the Caption as shown below:

Explorer Object Properties

Caption: 1. Generate AP Transactions

Description:

Image File Name: Browse...

Form Name: GenerateAPTransactions Select...

Parameters:

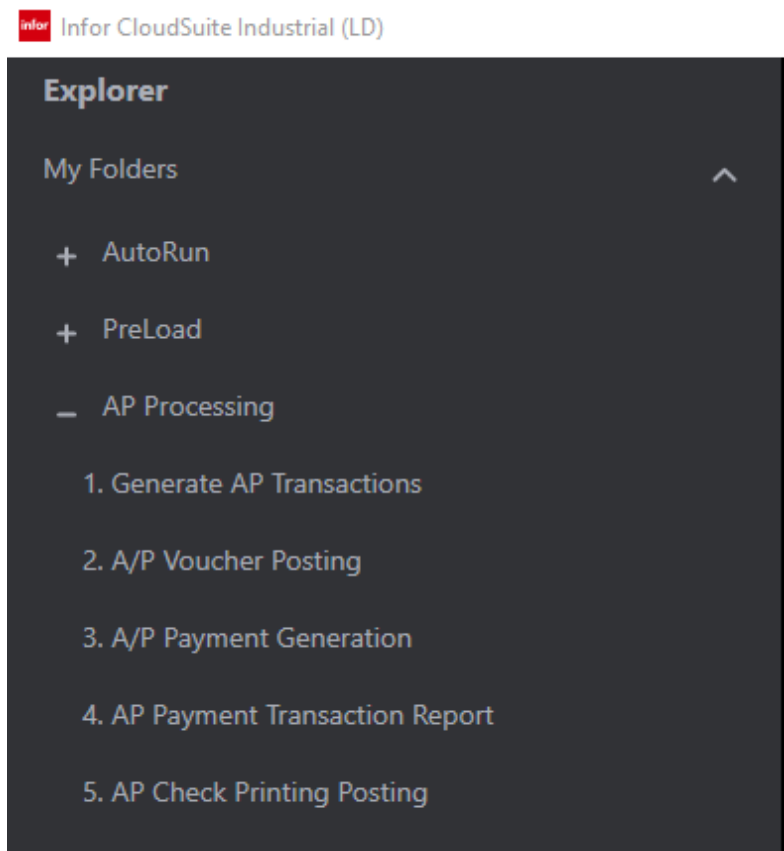
OK Cancel

11) Rename the other forms as above, in the sequence of steps you will take:

- 2. A/P Voucher Posting
- 3. A/P Payment Generation
- 4. AP Payment Transaction Report
- 5. AP Check Printing Posting

12) Now we need to reset CSI/SyteLine to re-read the Explorer Menu. To do this, simply hold down the Control Key (Ctrl) and press the letter "U". This is a trick that clears out any data that CSI has stored in memory and forces it to reread the database.

13) You should now see your AP Processing Menu with all your steps in proper sequence:



Congratulations! You now have a custom menu for your AP Process that you can quickly navigate.

For more information on CSI (SyteLine), visit our website today!

[Visit our website](#)

You can also visit our Tips and Techniques Library to see any of the issues you have missed!

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