Retail Pro® 9 User's Guide
Appendix A: Interface Design

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About this Guide

This document explains how to customize the interface of Retail Pro® 9.2.

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Document Revision History

Date	Revision
12/20/2012	Updated for 9.2 (R5)
02/07/2014	Misc updates for 9.20 (R5) URC5

Table of Contents

About Customizing Interfaces

You have great flexibility in customizing Retail Pro interfaces. You can add or remove fields and buttons from screen designs and menus to display data in multiple ways.

This document explains how to:

- Add/remove fields in List View
- Add/remove fields in Form View
- Apply formatting
- Create field groups
- Add/remove menu buttons

Interface Menu Buttons

Listed below are descriptions of Retail Pro® interface menu buttons.

Menu Buttons for Layout Manager and Page Manager

	Layout Manager	Page Manager
	Add a new layout.	Add a new page.
	Rename the selected layout.	Rename the selected page.
	Copy the selected layout. Use to create a new layout starting from the settings already specified in the copied layout.	Copy the selected page.
	Delete the selected layout.	Delete the selected page.
	Not applicable.	Define the font used on page tabs.

Menu Buttons for Page Designer

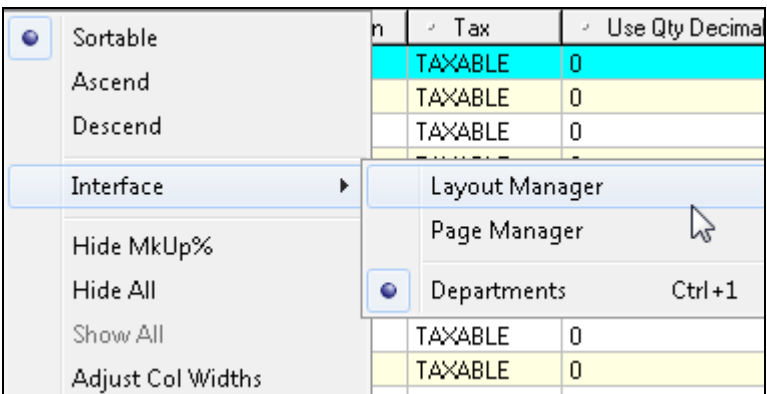| Button	Function	Description
	Fields	Add or remove fields from the display.
	Set Tab Order	Define the sequence for the cursor to follow (from field to field) when <Tab> is pressed.
	Properties	Change the font or color of the entire form; a single label or field; or group captions, labels, or fields. You can also add images to the form. Select the drop-down arrow to toggle on/off the display of properties for the selected field/group.
	Delete	Delete field or group of fields selected on the form.
	Save	Save changes and exit Page Designer.
	Exit Without Saving	Exit the Page Designer without saving any changes.
	Select Background	Browse for and display a form background image (*.gif, *.jpg, *.jpeg, or *.bmp formats supported). The selected image will tile, if necessary, to fill the form background.
	Erase Background	Remove the current background image from the form.
	Add Picture	Add and display a static image (*.gif, *.jpg, *.jpeg, or *.bmp formats supported). The image does not change when the displayed record changes. (Instead, add an Item Image, Style Image, etc., from the Setup Fields dialog to display a unique image for each record. See also Add Active Picture Link above.)
	Add Label	Add a descriptive label to the Form. This label is static and will not change when the displayed record changes. Limited to a single line of text. (See also Add Active Text Link and Add Memo.)
	Add Memo	Add a Form-related memo. A memo is static and will not change based when the displayed record changes. Memos support multiple lines of text.
	Grid Step	Change amount of space between each pixel in the grid.
	Snap to Grid	When selected, field movements and positioning is restricted to the pixel increments designated in Grid Step.

Button	Function	Description
⟷	Add Splitter	Add a dividing line between fields.
	Align Left	Align selected fields with the leftmost selected field.
	Align Right	Align selected fields with the rightmost selected field.
	Align Top	Align selected fields with the topmost selected field.
	Align Bottom	Align selected fields with the bottommost selected field.
	Equal Vertical Space	Equalize the vertical space between selected fields.
	Equal Horizontal Space	Equalize the horizontal space between selected fields.
	Adjust Width	Adjust the width of selected fields to that of the narrowest selected field.

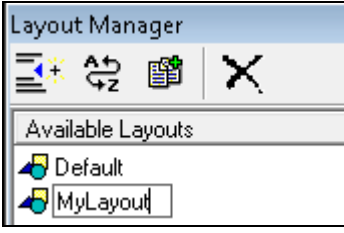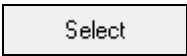# Changing List View and Form View Layouts

Layout Manager
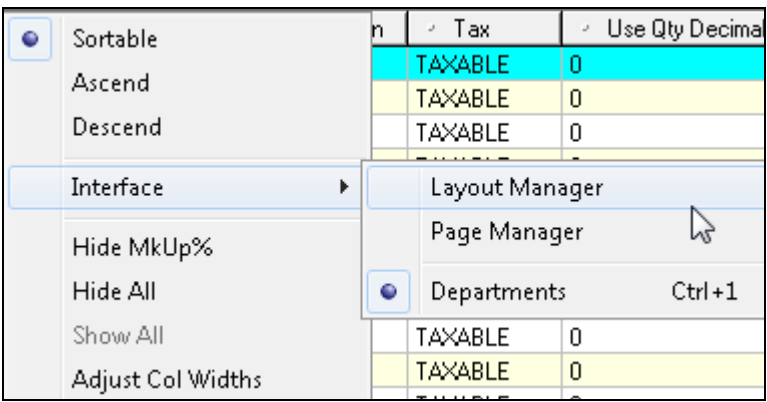
Use Layout Manager to manage the configurations (layouts) that you design using Page Manager and Page Designer. You can add, rename, copy and delete layouts.
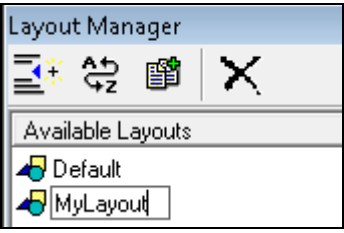
Add a new Layout

Steps	Instructions	Screen Elements
1.	Right-click in a column header and select Interface > Layout Manager.	
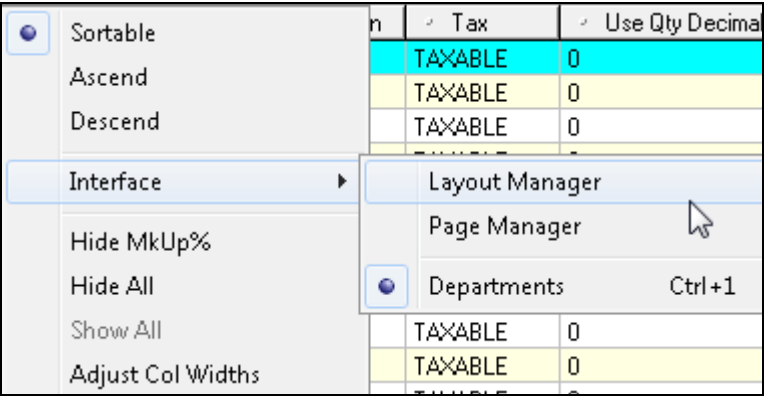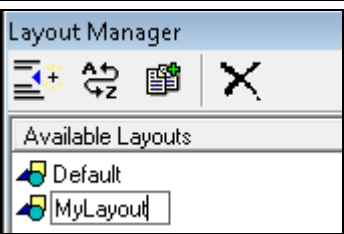
Steps	Instructions	Screen Elements
2.	In Layout Manager, click the Add button	
3.	Type a name for the new layout and press <Enter>.	
4.	With the new layout selected, click Select.	Select
5.	Change the appearance of the layout by adding/removing fields, tabbed pages, etc., and apply formatting	

Rename a Layout
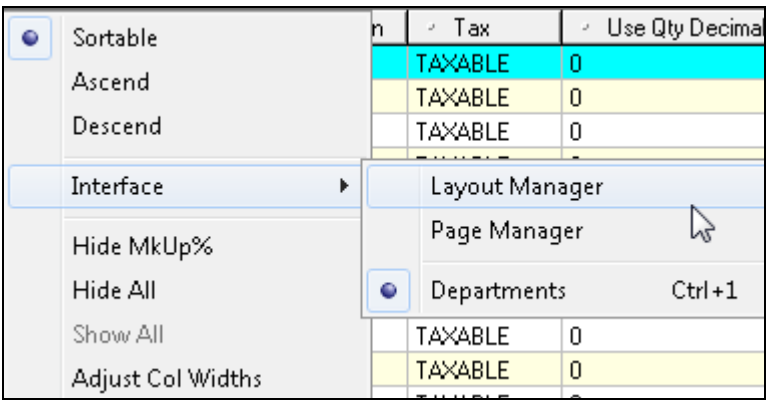
Steps	Instructions	Screen Elements
1.	Right-click in a column header and select Interface > Layout Manager.	
2.	Select a layout and click the Rename button.	

Steps	Instructions	Screen Elements
3.	Type a new name for the layout and press <Enter>.	

Copy a Layout

Steps	Instructions	Screen Elements
1.	Right-click in a column header and select Interface > Layout Manager.	
2.	Select a layout and then click the Copy button.	
3.	Type a new name for the layout and press <Enter>.	

Delete a Layout

Steps	Instructions	Screen Elements
1.	Right-click in a column header and select Interface > Layout Manager.	
2.	Select a layout and then click the Delete button.	

Page Manager
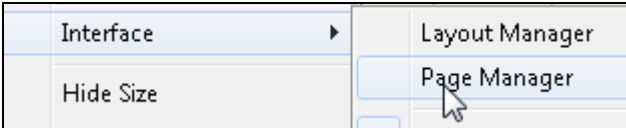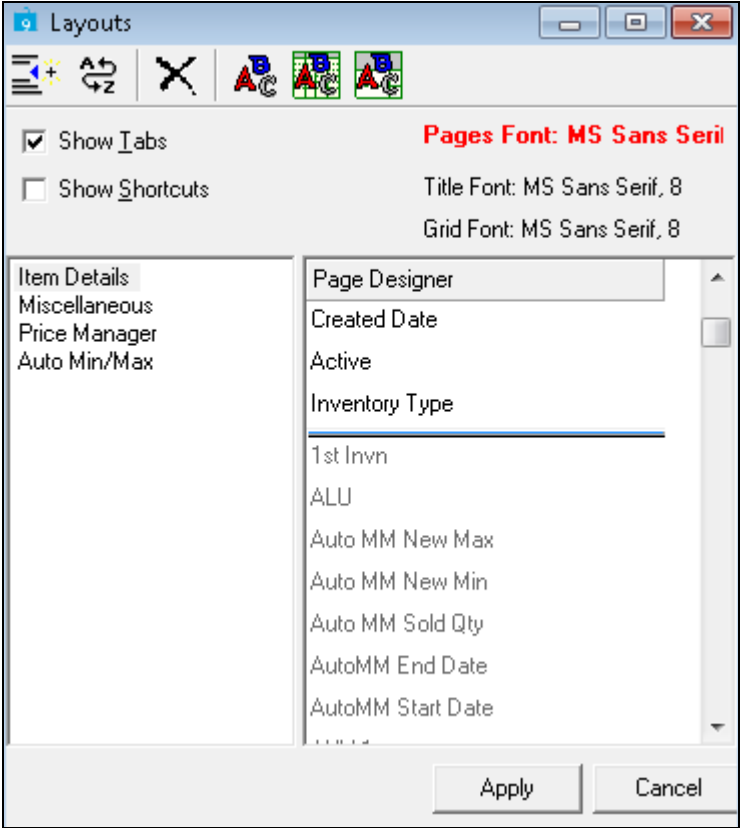
Use Page Manager to create and customize individual List View layouts and pages.

Page Manager Menu Buttons
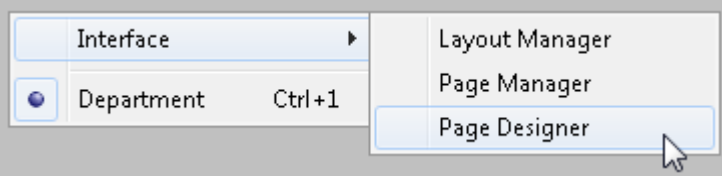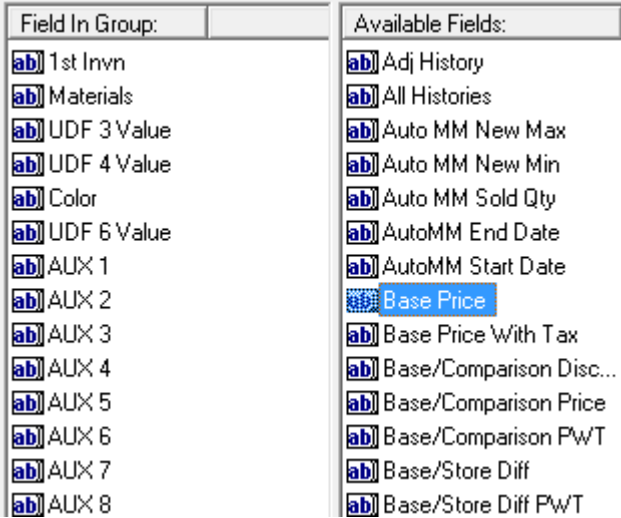
	New	Add a page to the layout.
	Rename	Rename the selected page.
	Delete	Delete the selected page.
	Page Font	Define the font on page tabs and captions.

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Adding/Removing Fields

You can add or remove fields in List View or in Form View. You can add a field to a list/form only once, either individually or in a group, but not both ways.

Steps	Instructions	Screen Elements
1.	Right-click in any column header and select Interface > Page Manager.	
2.	To include a field, double-click on it or click and drag it above the bar. Fields above the bar are included in the selected page design; fields below the bar are not. To remove a field, double-click the field name or click and drag it below the bar. You can also drag the bar up or down to include or exclude fields.	
3.	Click Apply.	

To add/remove fields in Form View:

Steps	Instructions	Screen Elements
1.	Right-click in an empty area of the form, then select Interface > Page Designer.	
2.	Click the Fields button.	
3.	Drag and drop the fields you want to add to your form from the Available Fields or Field in Group panes into the body of the form. You can add a field to a form only once, either individually or in a group, but not both ways.	
	Click to exit the Setup Fields dialog and return to Page Designer.	
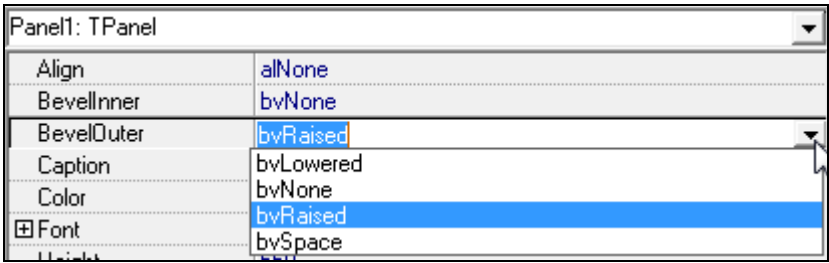
Create a Group of Fields and Add the Group to the Form

Steps	Instructions	Screen Elements
1.	Click in the Groups pane. Click the Add button.	
2.	A new group name is added to the list. Select the name and click the Rename button. Type the desired name and press <Enter>.	

Steps	Instructions	Screen Elements
3.	Double-click a field in the Available Fields pane to include the field in your group, or drag and drop the field into the Field in Group pane. Reorder the fields within the Field in Group if necessary by dragging the field name to the desired position. Drag and drop the group into the body of your Form. Re-position as needed	

Bevel Property for Field Groups
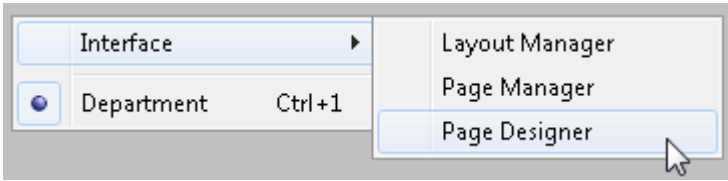
You can change the bevel of field groups. For example, you can apply a raised bevel to a field **group to give the group border a raised "3-D" look, or you can apply a lowe**red bevel to make the fields appear lowered into the screen.

Steps	Instructions	Screen Elements
1.	Display the screen in Form View. Right-click and select Page Designer.	Interface ▶ Layout Manager / Page Manager / Page Designer; ● Department Ctrl+1
2.	Select the Properties button.	
3.	Select the field group you want to change. Navigate to the GroupBevel property and select the desired setting.	Panel1: TPanel; Align alNone; BevelInner bvNone; BevelOuter bvRaised (bvLowered, bvNone, bvRaised, bvSpace); Caption; Color; Font
4.	Click the Save button.	

Adjusting Columns

Follow the instructions below to adjust how columns appear in List or Form View.

Change Column Width

To adjust the width of a column, drag the column heading separator to the desired width. To adjust all columns to the width of their largest entry, right-click the column heading and select **Adjust Col Width** from the pop-up menu.

Hide Columns

Right-click a column heading and select one of the following:

- Hide [Column Name] to remove the selected column from the display.

- Hide All to hide all columns except the selected column.

Show Columns

Right-click a column heading and select one of the following:

- Show All to re-display all hidden columns.

- A specific column heading to re-display only that column.

Change Column Position

Click the heading of the desired column and drag the column to the left or right.
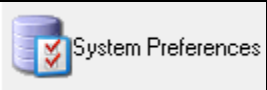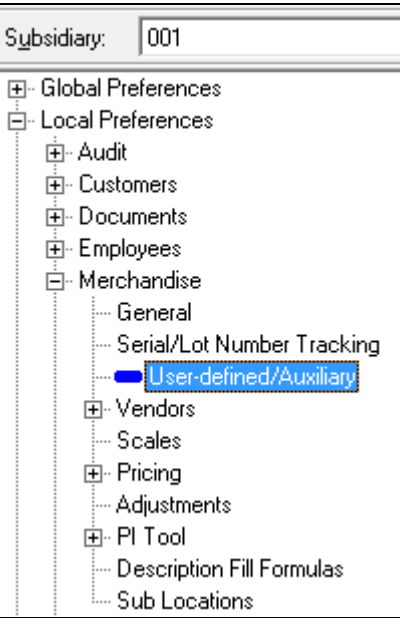
User-Defined, Auxiliary, and Supplemental Fields

User-defined fields are available for the Inventory, Vendors, and Customers areas. You can define the field labels and a list of entries to be available for selection from those fields.

The fields are assigned to either the UDF1-8 fields or Aux1-12 fields. The UDF1-2 fields are for creating your own date fields, for storing things such as birthdays or anniversaries. The UDF3-8 and Aux1-12 fields are text fields.

- In Customers, 20 user-defined fields are available (UDF 1-8 and Aux1-12)

- In Vendors, 8 user-defined fields are available (UDF1-8)

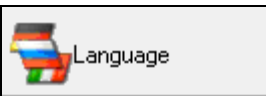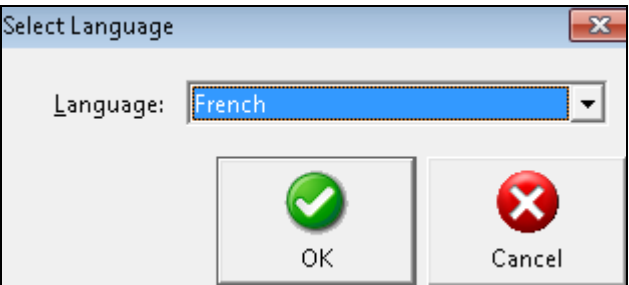- In Inventory, 15 user-defined fields are available (UDF1-6 and Aux1-9)

After you create the user-defined fields, add them to your layouts.

Steps	Instructions	Screen Elements
1.	Select Options > System Preferences from the home screen.	System Preferences
2.	Select one of the following pages: Local Preferences > Merchandise > User-defined/Auxiliary Local Preferences > Vendors > User-defined Local Preferences > Customers > User-defined/Auxiliary	Subsidiary: 001 ⊞ Global Preferences ⊟ Local Preferences ⊞ Audit ⊞ Customers ⊞ Documents ⊞ Employees ⊟ Merchandise General Serial/Lot Number Tracking User-defined/Auxiliary ⊞ Vendors Scales ⊞ Pricing Adjustments ⊞ PI Tool Description Fill Formulas Sub Locations

Steps	*Instructions*	*Screen Elements*
3.	In the Field Definitions table, enter a label for the field in the Field Name column	
4.	Select a field name and then in the Field Entries table, define the list of entries that will be available from the field	
	Click Update to save and exit preferences.	
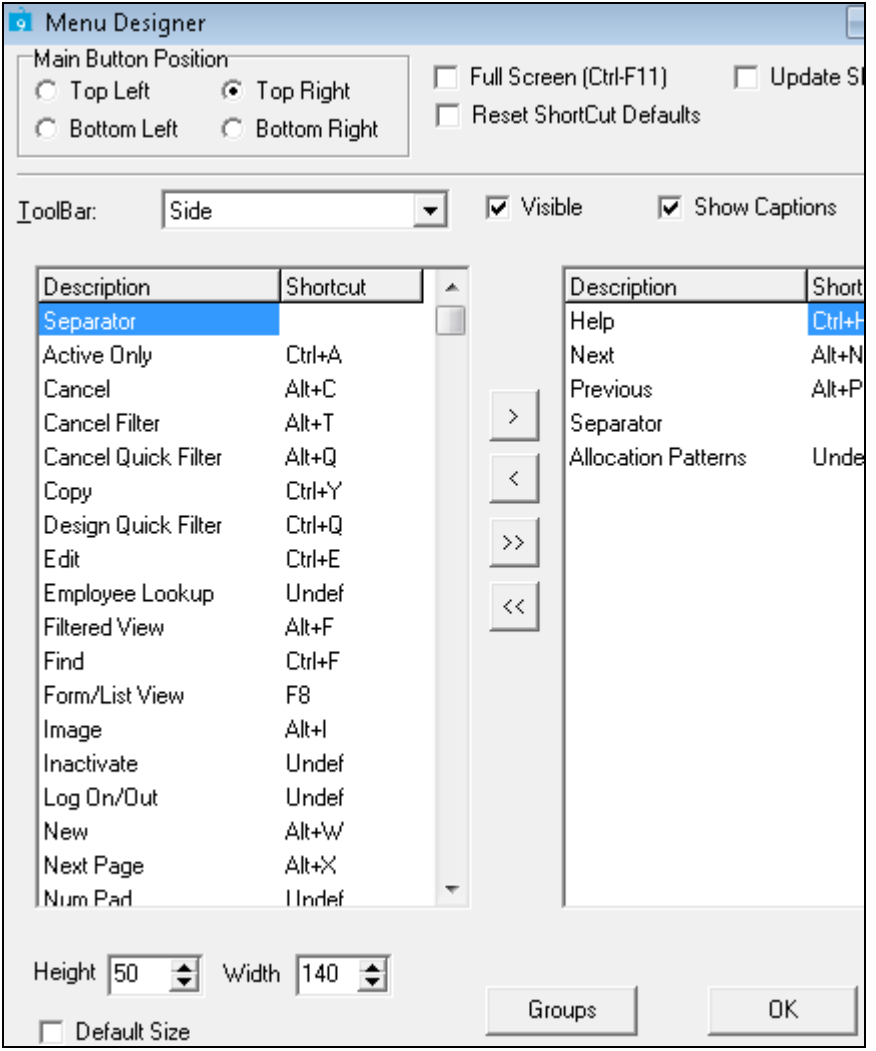
Changing Languages

You can change the Retail Pro interface to a different language using Language Manager.
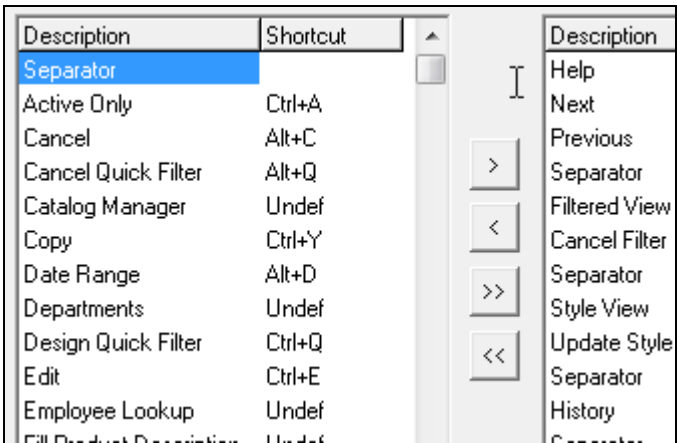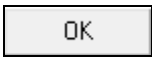
Steps	*Instructions*	*Screen Elements*
1.	Select **Options > Language** from the Home Screen. The Select Language dialog box displays.	
2.	Select a language from the drop-down list, and then click OK (***<Enter>***)	

Menu Designer

Menu Designer allows you to customize the location and appearance of your Retail Pro menus and menu buttons. You can customize the menus for each screen in Retail Pro.

Steps	*Instructions*	*Screen Elements*
1.	Right-click anywhere in the top or side menu and select Menu Designer. You can: Add or remove buttons Change the position of menus Hide/Show individual menus Display Retail Pro in full screen mode Add a separator Display or hide button text captions.	

Add or Remove Buttons

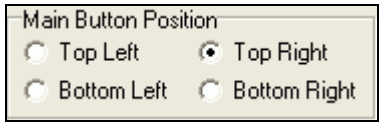| Steps	Instructions	Screen Elements
1.	In the **ToolBar** field, select **Main** to set options for the top menu, or select **Side** to set options for the side menu	
2.	Include/exclude buttons for the selected menu using one of the following methods: Click and drag buttons from one list to the other. Click a button, and then select a single arrow (> or <) to move the button from one list to the other. Double-click a button to instantly move it from one list to the other. Click the double arrows (<< or >>) to move all buttons from one list to the other	
3.	Click OK to close Menu Designer.	
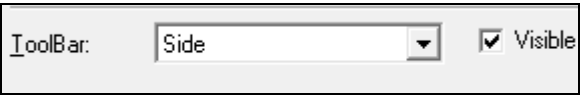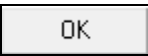
Change the Position of Menus

By default, the main Retail Pro button (see below) displays in the upper right corner of the screen, with the top menu to the left and the side menu below. You can change the position of a button by dragging and dropping the item into the desired location.

Steps	Instructions	Screen Elements
1.	With Menu Designer displayed, navigate to the Main Button Position area and make a selection: Top Left, Top Right, Bottom Left, or Bottom Right.	
2.	Click OK to close.	

Hide/Show Menus

Steps	Instructions	Screen Elements
1.	Select Main or Side in the Toolbar field. Select or unselect the Visable checkbox as desired. If selected, the menu is displayed; If not selected, the menu buttons are not displayed in the UI.	ToolBar: Side ▼ ☑ Visible
2.	Click OK to close.	OK

Display Retail Pro in Full-Screen Mode

Full-screen mode displays Retail Pro without the top and side menus.

To view Retail Pro in full-screen mode:

1. Select the Full Screen checkbox.

2. Click OK.

☑ Full Screen

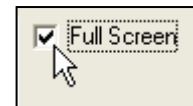To return to normal view, access Menu Designer, clear the Full Screen checkbox and click OK. while working in Retail Pro:

Adding a Separator

You can add a separator between buttons by including the Separator element and placing it in the desired position.

ToolBar:	Main ▼	☑ Visible	☑ Show Captions

Description	Shortcut		Description	Shortcut
Separator			Merchandise	Alt+M
About	Undef		Separator	
Adjustments	Alt+A		Purchasing	Alt+P

Merchandise	Purchasing
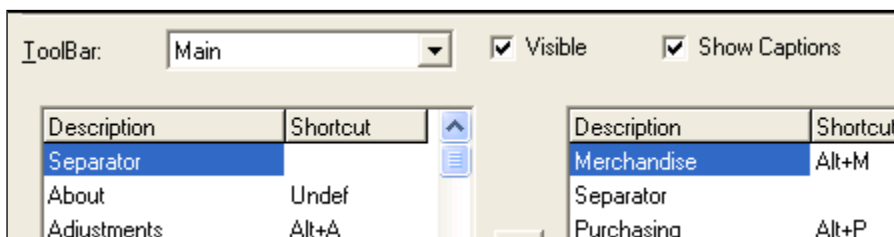
A separator is placed between the Merchandise and Purchasing buttons.

Show or Hide Button Captions
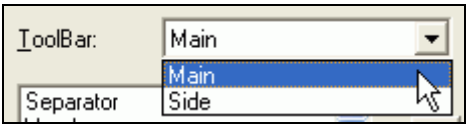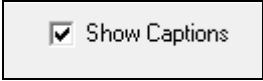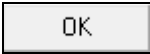
You can display a caption with each menu buttons icon, or display icons only.
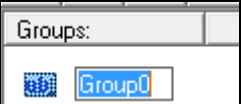
To show or hide button captions:
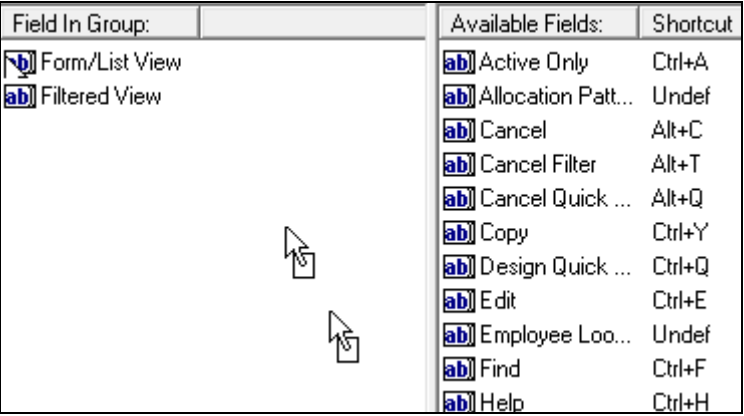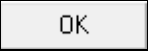
Steps	Instructions	Screen Elements
1.	In the Menu Designer dialog, navigate to the Toolbar field and select the toolbar you want to work with: Main or Side.	
2.	Navigate to the Show Captions checkbox and select or clear as needed. If selected, both the button image and button caption are displayed. If not selected, only the button image is displayed.	
3.	Click OK to close the Menu Designer dialog.	

Menu Button Groups

You can group menu buttons together, so that clicking a button displays a sub-menu of the assigned buttons. This is useful for grouping related buttons together and makes it possible to have more buttons overall available in the interface.

Create a menu button group:

Steps	Instructions	Screen Elements
1.	Click the Groups button in the Menu Designer dialog.	
2.	Click the Add Groups button.	
3.	Select a group and click the Rename Group button.	
4.	Type a new name and press <Enter>.	

5.	Click on a button in the Available fields area and drag it to the Fields in Group area. Repeat for each button that you want to be part of the group	
6.	When you are **finished, click the 'X'** in the top right corner of the Setup Fields dialog. Click Yes when asked if you want to save your changes	
7.	Click OK to close the Menu Designer dialog.	OK

Assign an Image to a button group.
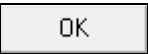
Select a group and then click the Image button.

Navigate to and select the image file that you want to use, and then click Open

Delete a menu button group:
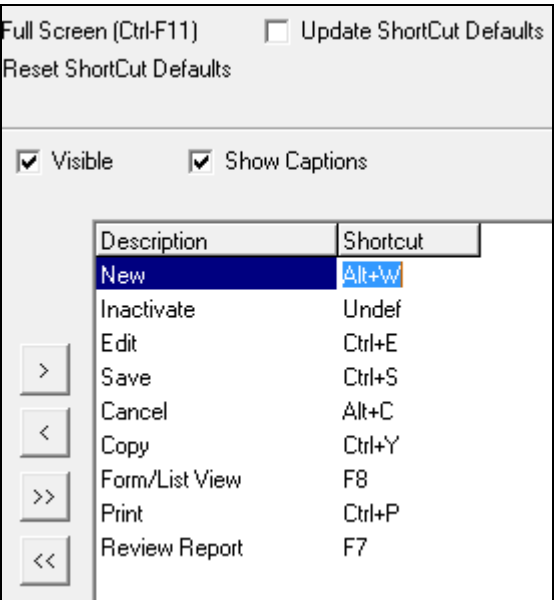
Steps	*Instructions*	*Screen Elements*
1.	Click the Groups button in the Menu Designer dialog.	Groups
2.	Select a button group and click the Delete Group button.	
3.	Click the 'X' in the upper right corner of the Setup Fields dialog. Select Yes when asked if you want to save your changes	

| Steps	Instructions	Screen Elements
4.	Click OK to close the Menu Designer dialog.	OK

Create Keyboard Shortcuts

A keyboard shortcut is a key or set of keys that performs a predefined function. Within Menu Designer, you can assign a keyboard shortcut to many of the buttons available in Retail Pro . You can also create button groups, which cause a single keystroke combination to bring up a list of buttons from which you can select.

Keyboard shortcuts will work even if the corresponding button does not display on the screen. In order to keep track of what keystroke and function was used, a message will display in the status bar at the bottom of the screen when you use a shortcut.

Steps	Instructions	Screen Elements
1.	Right-click in the top or side menu and then select Menu Designer.	Menu Designer
2.	Highlight the button description and type the keyboard shortcut directly into the Shortcut field using Keyboard Shortcut convention. Click OK when finished.	Full Screen (Ctrl-F11) □ Update ShortCut Defaults Reset ShortCut Defaults ☑ Visible ☑ Show Captions Description / Shortcut New / Alt+W Inactivate / Undef Edit / Ctrl+E Save / Ctrl+S Cancel / Alt+C Copy / Ctrl+Y Form/List View / F8 Print / Ctrl+P Review Report / F7

Notes

- You can reset the keyboard shortcuts back to the defaults at any time by checking Reset Shortcut Defaults and clicking OK.   □ Reset ShortCut Defaults
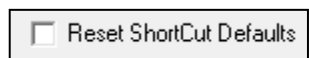
- Any buttons that are not capable of using a keyboard shortcut will be blank.

Displaying Shortcut Keys

You can display the shortcut keys that are assigned to menu buttons by holding the cursor over a button and then pressing the **<Alt>** key.

Adding Custom Buttons for Outside Applications

The Usermenu.ini file stores information for the buttons that appear on the Retail Pro user menus.

You can change the [TOOLS] area of the **Usermenu.ini** file to add buttons that link to outside applications. For example, you might want to add a button to the Tools menu that links to your QuickBooks accounting software. The buttons that you add can be accessed by clicking Tools on the Retail Pro Home Screen.
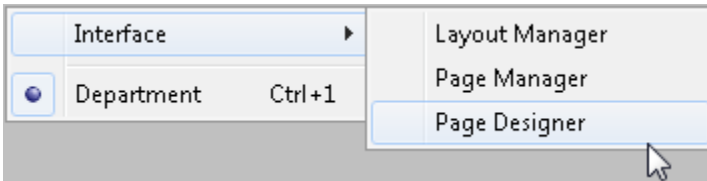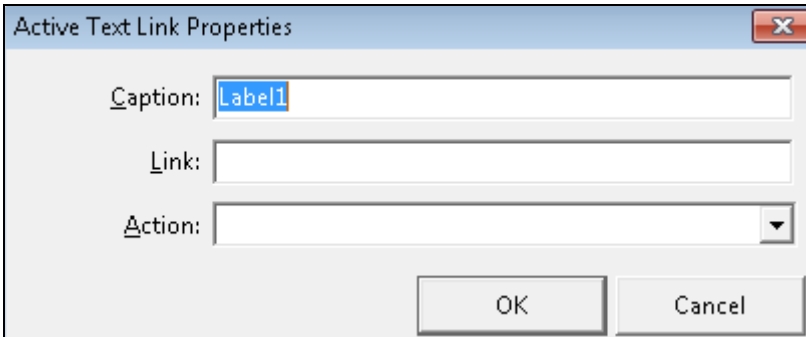
Example:

[TOOLS]

MyButton=MyExecutable.exe /someparameter
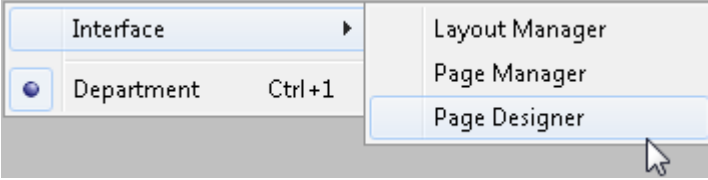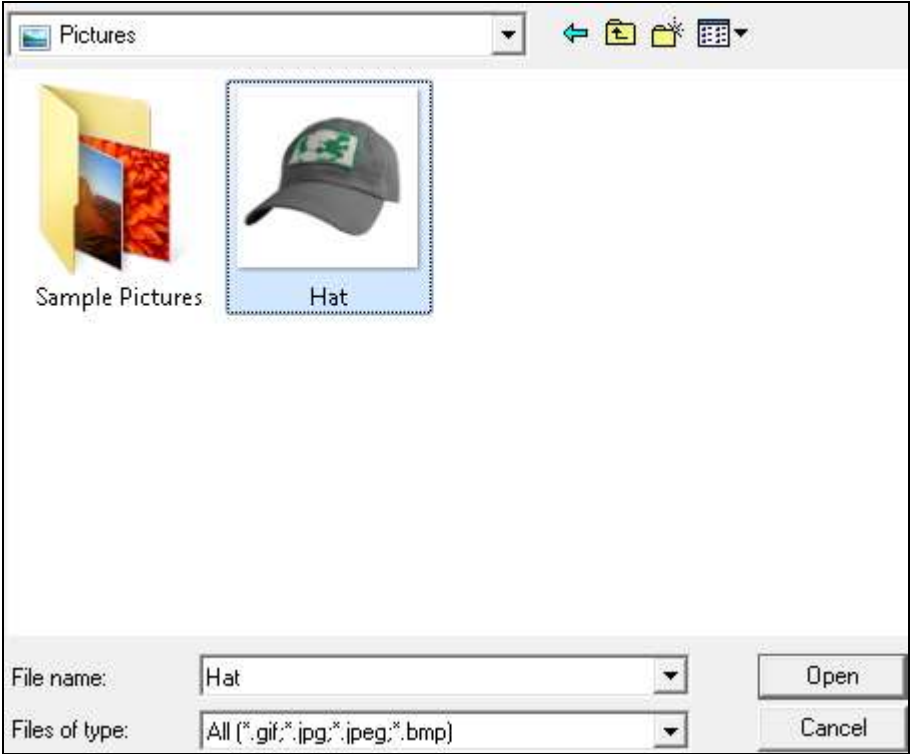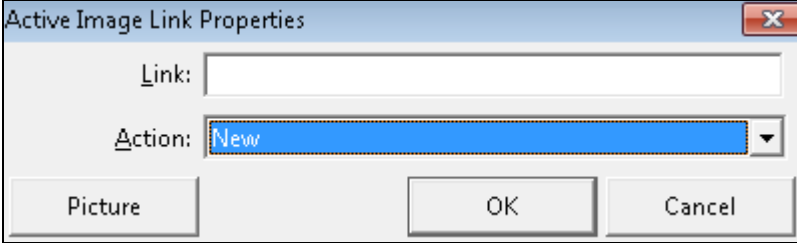
Active Links

By adding an active link to Form View layouts, mouse and touchscreen users can display an HTML page (in a separate browser window), launch a program file, or activate a side menu function, all from anywhere within the form layout. When the cursor is placed over an active link in a form, it is displayed as the typical "hand" icon indicating it is an active link.

Active links can be added to any form layout as either a text link or a picture link. Text links and picture links work identically. The only difference is that with a picture link you can represent the link on the form with a graphic image.
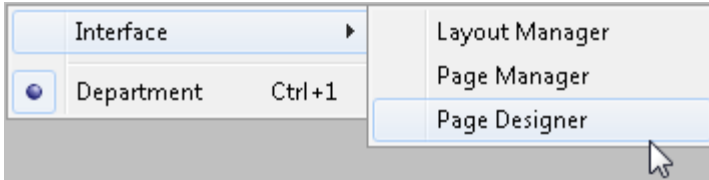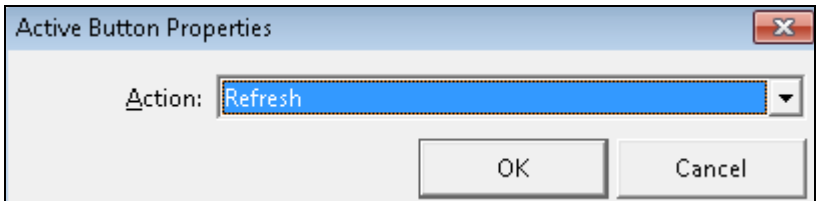
Add active text link:

Steps	*Instructions*	*Screen Elements*
1.	In Form View, right-click in an empty area of the form and select Interface > Page Designer.	
2.	Select the Add Active Text Link button.	
3.	Enter a caption that will be displayed on the form. Link - specify the path to an HTML page or program executable file that will launch when the active link is selected. Action - specify an action that will be performed when the active link is selected. Click OK when finished.	
4.	Reposition the link on the form as needed and click the Save button.	

Add an active image link to a form:

Steps	Instructions	Screen Elements
1.	In Form View, right-click and select Page Designer.	Interface ▶ Layout Manager / Page Manager / Page Designer ● Department Ctrl+1
2.	Click the Add Active Image Link button.	
3.	Browse for an image in the dialog that is displayed. The selected image is added to the form. Double-click the image to access the Link Properties dialog	Pictures / Sample Pictures / Hat / File name: Hat / Files of type: All (*.gif;*.jpg;*.jpeg;*.bmp) / Open / Cancel
4.	Double-click the image to access the Link Properties dialog. Select an Action for the picture and then click OK.	Active Image Link Properties / Link: / Action: New / Picture / OK / Cancel

Steps	Instructions	Screen Elements
	Resize and reposition the picture as needed and then click the Save button.	

Add active button link to form

Steps	Instructions	Screen Elements
1.	In Form View, right-click and select Page Designer.	
2.	Select Add Active Button Link from the Page Designer toolbar.	
3.	Select an action that will be performed when the button is clicked. Click OK.	
4.	Position the button on the form as needed and then click Save.	

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