

Sage 300 :: Visual Design Patterns

sage



TABLE OF CONTENTS

Basic Patterns

05-12:: Basic Form Elements

23-25:: Visual Defects Guide

Complex Modules

15:: Complex Modules

Samples

27:: A/R Recurring Charges

28:: O/E Options

General Rules

17-19:: General Rules

Page Specific Rules

21:: Visual Defects Guide

Visual Defects Guide

VERSION HISTORY

Basic Patterns

BASIC FORM ELEMENTS

TEXT INPUT FIELD

Place label at top and text input field / select list below.

Description

Description

TEXT INPUT FIELD WITH FINDER

Go button is added whenever finder button is there.

Default Closing Account 3200 

Default Closing Account  

TEXT INPUT FIELD WITH FINDER AND INCREMENT

Ignore arrows.

For increment button, if its input field is first form element in the form, this becomes “New” button in the form heading.

Batch Number   000195    

Batch Number   

TEXT INPUT FIELD WITH FINDER, INCREMENT & OTHER MENU

Any buttons other than “New” button should be consolidated into one “Menu” button.

Customer No. *     

Customer Number *    

Vendor Number  

Vendor Number   

BASIC FORM ELEMENTS

DATE INPUT FIELD WITH DATE PICKER

Use medium (default) size for date input field.

Date 

Date 

FISCAL PERIOD INPUT FIELD WITH FISCAL PERIOD PICKER

Use medium (default) size for fiscal period input field.

Year/Period 

Year/Period 

CHECKBOXES

Checkboxes should always be placed vertically.

- Allow Posting to Previous Years
- Allow Provisional Posting
- Force Listing of Batches

- Allow Posting to Previous Years
- Allow Provisional Posting
- Force Listing of Batches

RADIO BUTTONS

Radio buttons should always be placed vertically.

- Letter
- Label

- Letter
- Label

Edit Imported Entries All Fields

Edit Imported Entries

+ Add New		Delete	Edit Columns	<input checked="" type="radio"/> Normal Entry Mode	<input type="radio"/> Quick Entry Mode
	Text input	Single-selection List	Finder	Date	Time
<input type="checkbox"/>	View	View	View	2014-04-30	2014-04-30
<input type="checkbox"/>	View	View	View	2014-04-30	2014-04-30
<input checked="" type="checkbox"/>	Editable mode	Editable mode ▾	Editable mode <input type="text"/> 	2014-04-30 	2014-04-30 
<input type="checkbox"/>	View	View	View	2014-04-30	2014-04-30
<input type="checkbox"/>	View	View	View	2014-04-30	2014-04-30
<input type="checkbox"/>	View	View	View	2014-04-30	2014-04-30

Document Type	Next Number
Next Invoice Batch	66
Next Payment Batch	65
Next Adjustment Batch	3
Next Invoice Posting Sequence	32
Next Payment Posting Sequence	17
Next Adjustment Posting Sequence	2
Next Revaluation Posting Sequence	1

Document Type	Next Number
Lorem ipsum	2213
Lorem ipsum	2110
 	2010
	201
	20
	2

BASIC FORM ELEMENTS

COLUMN LAYOUT

Use column layout when 2 or more sets of the same input fields are stacked.

Add table heading if missing for a column that contains input fields.

	General Ledger Account	
Revenue	<input type="text"/>	<input type="button" value="🔍"/>
Inventory	<input type="text"/>	<input type="button" value="🔍"/>
Cost of Goods Sold	<input type="text"/>	<input type="button" value="🔍"/>

	General Ledger Account	Description
Row heading	<input type="text"/>	<input type="button" value="🔍"/>
Row heading	<input type="text"/>	<input type="button" value="🔍"/>
Row heading	<input type="text"/>	<input type="button" value="🔍"/>
Row heading	Focused	<input type="button" value="🔍"/>

MULTI-SELECT BOX

The screenshot shows a configuration interface for selecting applications. On the left, a list of 'Available Applications' includes: Accounts Receivable 6.2A, Administrative Services 6.2A, Bank Services 6.2A, Common Services 6.2A, General Ledger 6.2A, G/L Subledger Services 6.2A, Inventory Control 6.2A, Order Entry 6.2A, and Project and Job Costing 6.2A. One item, 'Accounts Receivable 6.2A', is selected and highlighted in blue. On the right, a list of 'Check Applications' includes: Accounts Payable 6.2A. A button labeled 'Include ->' is positioned between the two lists. Below the lists are several control buttons: 'Include ->', '<- Exclude', 'All ->', 'Order', a plus sign (+) button, and a minus sign (-) button. At the bottom right is a button labeled 'Application Options...'. To the right of the interface is a vertical scroll bar.

The screenshot shows a list of items with placeholder text 'Lorem ipsum dolor sit amet'. The list includes six items, each preceded by a small blue square. To the right of the list are four buttons: 'Move All' (with double arrows), 'Move One' (with a single arrow pointing right), 'Move All' (with double arrows pointing left), and 'Move One' (with a single arrow pointing left). Below these buttons is a section labeled 'Order' with up and down arrow buttons. To the right of the list is another vertical scroll bar.

SUMMARY

Place summary block at the top right corner just below form heading.

Posting Statistics	
Last Batch	220
Next Posting Sequence	51
Next Prov. Posting Sequence	1
Current Fiscal Year	2020
Oldest Year of Fiscal Sets	2018
Oldest Year of Transaction Detail	2018

Entries:	0
Debits:	0.00
Credits:	0.00
Quantity:	0
Type:	Entered
Status:	Open

Posting Statistics	
Entries:	15.00
Debits:	15.00
Credits:	0.00
Quantity:	1
Type:	Entered
Status:	Open

BASIC FORM ELEMENTS

CHECKBOX WITH TRIGGERED INPUT FIELD

The select list is triggered by checking the checkbox. For this behaviour, treat the checkbox as a label and apply standard label on top and field below layout.

Auto Reverse

Checkbox selected

INLINE INPUT FIELD

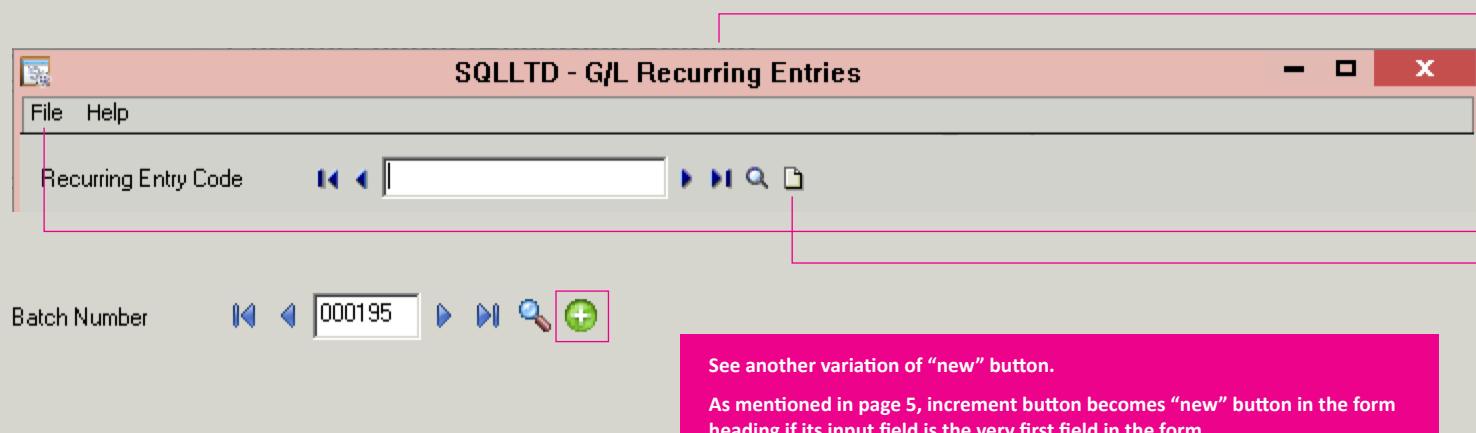
When a input field is inserted in a sentence, treat it as an inline input field.

Keep Years of Fiscal Sets

- Keep - Years of Fiscal Sets -

FORM HEADER

Often, the first input field with finder has “new” button. This button becomes “new” button in the form heading.



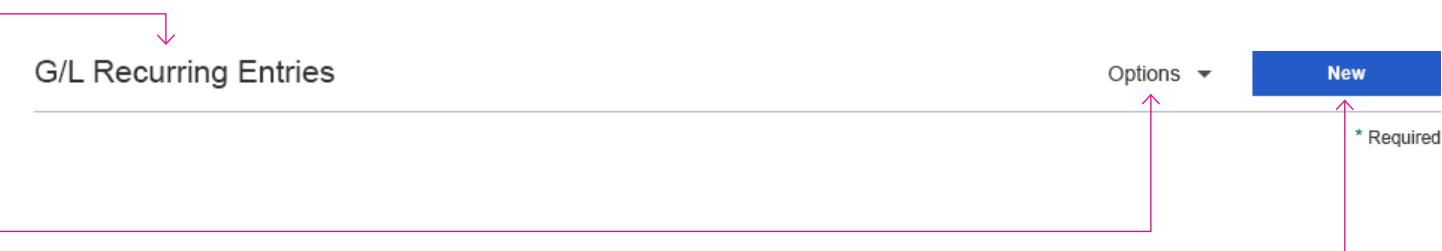
SQLLTG - G/L Recurring Entries

File Help

Recurring Entry Code

Batch Number

See another variation of “new” button.
As mentioned in page 5, increment button becomes “new” button in the form heading if its input field is the very first field in the form.



G/L Recurring Entries

Options

* Required

BASIC FORM ELEMENTS

FORM FOOTER BUTTONS

Ignore “close” button. Ignore “detail” button too if it only contains the same fields as in grid itself.

Collapse any border or line in order to avoid a double-lines.

Use primary green for “save” and “delete” button. For anything else, use secondary buttons.

The “save” button should be placed at right end all the time.



BOXED ELEMENTS

Sometimes, heading for the boxed elements are outside the box. Move the heading and apply the same treatment all the time.

Include	
<input type="checkbox"/> Previously Printed Batches	<input checked="" type="checkbox"/> Ref. and Desc.
<input type="checkbox"/> Trans. Optional Fields	<input checked="" type="checkbox"/> Comments

Include	
<input type="checkbox"/> Previously Printed Batches	
<input type="checkbox"/> Transactional Optional Fields	
<input checked="" type="checkbox"/> Reference and Description	
<input checked="" type="checkbox"/> Comments	

20px inner spacing (padding) along with 20px outer spacing (margin) vertically.
Horizontally, there is no spacing. Heading is 14px bold.

Occasionally, input fields are clearly grouped with indentation but do not have a box around it or any rule to separate the group from the elements around. Apply the same treatment by adding rules and heading.

Aging Periods:

Current	1st	2nd	3rd	Over
<input type="text" value="0"/>	<input type="text" value="30"/>	<input type="text" value="60"/>	<input type="text" value="90"/>	90 Days

Sort Transactions By Transaction Type

Aging Periods

Current	1st	2nd	3rd	Over
<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="30"/>	<input type="text" value="60"/>	60 days

Show the current column

BASIC FORM ELEMENTS

ENTITY COMBINATION

Entity combination pattern is found for a field with only arrows and finder without text input field. Subsequent input fields are combined to define an entity.

Item Prices 

Currency Code	AUD 	Australian Dollars
Price List Code	AUSTRA 	Australia Price List

Item Prices 

Currency Code	AUD 	Currency Description	Australian Dollars
Price List Code	AUSTRA 	Price List Description	Australia Price List

GRID DETAIL

Sometimes, grid has a table displaying details of selected row of the grid. Instead of using column layout, use this pattern instead to better represent relationship between the two elements.

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	167	2 	200 	0 	167
All Locations (Ea.)	731	2 	825 	0 	731

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	167	2 	200 	0 	137
All Locations (Ea.)	731	2 	825 	0 	731

TABS

Company | Processing | Transactions | Numbering | Statement | Retainage

Company | Processing | Transactions | Numbering | Statement | Retainage

RULE

20px vertical spacing around the rule.

BASIC FORM ELEMENTS

ADDRESS

Address is a common module found in many screens.

Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text"/>
Telephone	(<input type="text"/> - <input type="text"/>) <input type="text"/>
Fax	(<input type="text"/> - <input type="text"/>) <input type="text"/>
E-mail	<input type="text"/>

Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
City	<input type="text"/>
State / Province	<input type="text"/>
Country	<input type="text"/>
Zip / Postal Code	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email Address	<input type="text"/>

CURRENCY

Often, currency is associated with multicurrency selection and default rate type.

Functional Currency

Multicurrency

Default Rate Type

Multicurrency

Functional Currency Default Rate Type

>

BASIC FORM ELEMENTS

APPLY BUTTON

There are two variations of “Apply” button. Both of them on click update fields below the button. To improve user experience, CNA 2.0 will have this as a standard button with secondary button style with clear text “Apply”.

The "Apply" button should be left aligned and be placed right above set of fields that are updated as per values in fields above the button.

For instance in the 1st example, the "Apply" button should be placed right above Doc. Type field. In the 2nd example, the "Apply" button should be placed right above the grid.

Apply	Document Type	Document Number	Payment Number	Pending Balance	Applied Amount	Discount Available	Discount Taken	Adjus:
No	Invoice	100-01	1	0.13	0.00	0.00	0.00	
No	Invoice	12345	1	108.25	0.00	0.00	0.00	
No	Invoice	IN120111	1	202.97	0.00	0.00	0.00	
Pending	Invoice	IN120121	1	0.00	0.00	0.00	0.00	
No	Invoice	IN120131	1	152.23	0.00	2.81	0.00	

Complex Modules

COMPLEX MODULES

CROSS-FIELDSET DYNAMICS WITH RADIO BUTTONS

In some cases, radio buttons work like tabs and content of another fieldset changes depending on the selected radio button.

Recurring Periods

- Daily
- Weekly
- Semi-monthly
- Monthly
- Yearly

Frequency

- Every Day(s)
- These Work Days
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday

In both examples, the content of right box changes depending on the selected radio button in the left box behaving just like tabs.

Recurring Periods

- Daily
- Weekly
- Semi-monthly
- Monthly
- Yearly

Frequency

- Every Day(s)
- These Work Days
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday

Use indentation to indicate grouping of child elements.

General Rules

GENERAL RULES

ORDER OF FORM ELEMENTS

Order of form elements should flow linear from top to bottom.

Exceptions are ...

- Summary block should be placed top right corner just below form heading.
- Directly related fields should be placed horizontally.

Examples of directly related fields are below.

Recurring Entry Code

Entry Description

Debits Credits Out of Balance By

From
To

Last Maintained Inactive

Sort By
Segment
From
To

TAB INDEX

Tab index should flow left to right then top to bottom.

Recurring Entry Code

Entry Description

Debits Credits Out of Balance By

From To

Last Maintained Inactive (as of)

Sort By
Segment
From To

GENERAL RULES

CONDITIONAL FIELDS

Some fields are conditional and only visible when a certain elements is selected. Rule is to keep the page as static as possible with least amount of page-jumping.

- Use disabled field as a place holder if an element is not visible.
- If a label or a field get swapped out conditionally, swap them out too on CNA 2.0. Again, keep the page as static as possible.

Inactive Inactive 08/18/2010

Inactive

Inactive field works as a label. So, it's placed above the disabled text field which will become read-only once the inactive field is checked.
In order to eliminate page-jumping, the conditional text field is presented as disabled text field.

SIZE OF INPUT FIELDS

The size of input fields should closely match the size used in on-prem application screen. Five target sizes are x-small, small, medium (default), large and x-large.

Use next size up if it can't fit the number of characters used in on-prem application.

Below example shows the order of input fields, tab indexing, a conditional field and different size of fields all combined.

Terms Code P90 90 day Multiple Payments

Last Maintained 08/18/2010 Inactive

Calculate Base for Discount With Tax Excluded Multiple Payment Schedule

Due Date Type End of Next Month Discount Type End of Next Month

	x-small	small	medium (default)	large	x-large
Size from Sage 300	< 4 characters	5 - 8 characters	9 - 17 characters	18 - 34 characters	> 35 characters
Size for CNA 2.0	60px	100px	160px	280px	580px

Above sizes are recommended based on grid system.

Terms Code P90 1 2 3 Terms Code Description 90 Days Multiple Payments 4

Last Maintained 08/18/2010 5 Inactive (as of) 10/21/2014

Calculated Base for Discount with Tax Excluded 6

Multiple Payment Schedule

Due Date Type End of Next Month 7 Discount Type End of Next Month 8

Showing the order of fields and tab index which skips disabled/read-only fields.
The terms code field and its description field are placed horizontally because of direct relationship.

Page Specific Rules

PAGE SPECIFIC RULES > ENTRY SCREENS

BATCH SUMMARY

Entry screens often have batch summary at the top with readonly fields that are never edit-able. Those readonly fields can be grouped under batch summary.

Batch Number		No. of Entries	0	Total Amount	0.000
Batch Date	03/10/2020				

Batch Number		Batch Summary
Batch Description		
Batch Date	03/10/2020	No. of Entries: 0 Total Amount: 0

TOTALS TAB

A totals tab usually has this layout where the left content is mostly text based with occasional inline form fields and the right content with readonly form fields and occasional editable form fields.

Order Subtotal	816.65		
Less Detail Discount	0.00000 % 0.00		
Net of Detail Discount	816.65		
Less Order Discount	0.00000 % 0.00		
Net Amount	816.65		
Plus Excluded Tax	67.37		
Total	884.02		
Less Total Prepayments	0.00		
Less Terms Discount Available	0.00		
Outstanding Order Amount	884.02		
Items Subtotal	816.65		
Misc. Charges Total	0.00		
<input type="checkbox"/> Discount Miscellaneous Charges			
On	816.65		
Included Tax	0.00		
Total Tax	67.37		
Estimated Weight	0.0000 lbs.		
Number of Labels	1	Number of Lines	4

Order Subtotal:	816.65		
Less Detail Discount:	0.00000 % 0.00		
Net of Detail Discount:	816.65		
Less Order Discount:	0.00000 % 0.00		
Net Amount:	816.65		
Plus Excluded Tax:	67.37		
Total:	884.02		
Less Total Prepayments:	0.00		
Less Terms Discount Available:	0.00		
Outstanding Order Amount:	884.02		
Items Subtotal	119.98		
Misc. Charge Total	0.00		
<input type="checkbox"/> Discount Miscellaneous Charges			
On	0.00		
Included Tax	0.00		
Total Tax	9.90		
Estimated Weight	3.0000 lbs		
Number of Labels	1	Number of Lines	4

Visual Defects Guide

VISUAL DEFECTS GUIDE

LEFT ALIGNMENT

All form fields must left-aligned all the time at the left edge.

Exceptions are ...

- Summary which should be placed top right
- Footer buttons are right aligned.



Recurring Entry Code
BANKCHARGE > 

Description
Monthly Bank Charge

Debits
15.00

Exchange Rate




Recurring Entry Code
BANKCHARGE > 

Description
Monthly Bank Charge

Debits
15.00

Exchange Rate


VERTICAL ALIGNMENT

All adjacent fields should be vertically aligned.



Recurring Entry Code
BANKCHARGE > 

Description
Monthly Bank Charge



Recurring Entry Code
BANKCHARGE > 

Description
Monthly Bank Charge



Recurring Entry Code
BANKCHARGE > 

Description
Monthly Bank Charge

VISUAL DEFECTS GUIDE

NATURAL FLOW

Form elements should naturally flow top to bottom and left to right while keeping spacing consistent.

- Overlapping of any elements is not acceptable.
- A label, a form field and related buttons (ie. finder, go, increment buttons) are together considered as a single unit and should always move together.

Extra long French word for Recurring Entry Code

 BANKCHARGE > 

Description

Extra long French word for Recurring Entry Code

 BANKCHARGE > 

Description

Extra long French word for Recurring Entry Code

 BANKCHARGE > 

Recurring Entry Code

 BANKCHARGE > 

Address
 Profile
 Recurring Payables
 Optional Fields

 Address Recurring Payables
 Profile Optional Fields

Samples

SAMPLES > A/R RECURRING CHARGES

SQLLTD - A/R Recurring Charges

Recurring Charge Code: ONCALL (On call service contract)

Customer Number: 1100 (Bargain Mart - San Diego)

Schedule Code: WEEKLY (Weekly schedule)

Start Date: 01/01/2019 Last Maintained: 08/18/2010 Inactive:

Next Invoice Date: 01/07/2019 Last Generated: / /

Expiration Type: Specific Date (12/31/2020)

Account Set: USA Job Related: Currency: USD Rate Type: SP

Ship-To: Ship Via:

Description: Emergency on call retainer. PO Number: 1452

Special Instructions:

Terms: N30 Net 30 Days

Buttons: Save, Delete, Create Invoice..., Close

A/R Recurring Charges

Options

* Required

Recurring Charge Code * Recurring Charge Description

Customer Number * Customer Name

Invoice Detail Optional Fields Sales Split Tax/Totals Statistics

Schedule Code * Schedule Code Description

Start Date Last Maintained Inactive (as of): Jun 24, 2015

Next Invoice Date Last Generated

Expiration Type Expiration Date Label Current Amount

Account Set * Currency Rate Type

Ship-To Ship Via Ship Via Description

Description

Special Instruction

PO Number Order Number

Terms * Terms Description

1099/CPRS Code 1099/CPRS Code Description 1099/CPRS Code Amount

Buttons: Create Invoice, Delete, Save

SAMPLES > O/E OPTIONS

SQLLTD - O/E Options

File Help

Company | Processing | Documents

SQLLTD
123 Sample Company Plaza

Any City
Any Province
V6J 9T3
Canada

Contact Name
Telephone
Fax Number

O/E Options

Options ▾

* Required

Company | Processing | Documents

Sample Company Limited
123 Sample Company Plaza
Any City
Any Province
V6J 9T3
Canada

Contact Name

Phone Fax



Sage 300 :: Visual Design Patterns

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