

PayBiz – Custom Menu

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Custom Menu

The custom menu allows users to customise their side bar menu within PayBiz to continue the options relevant to their job for quick access to the options used frequently.

Configure Custom Menu

PayBiz Main Menu > Custom > Configure Custom Menu

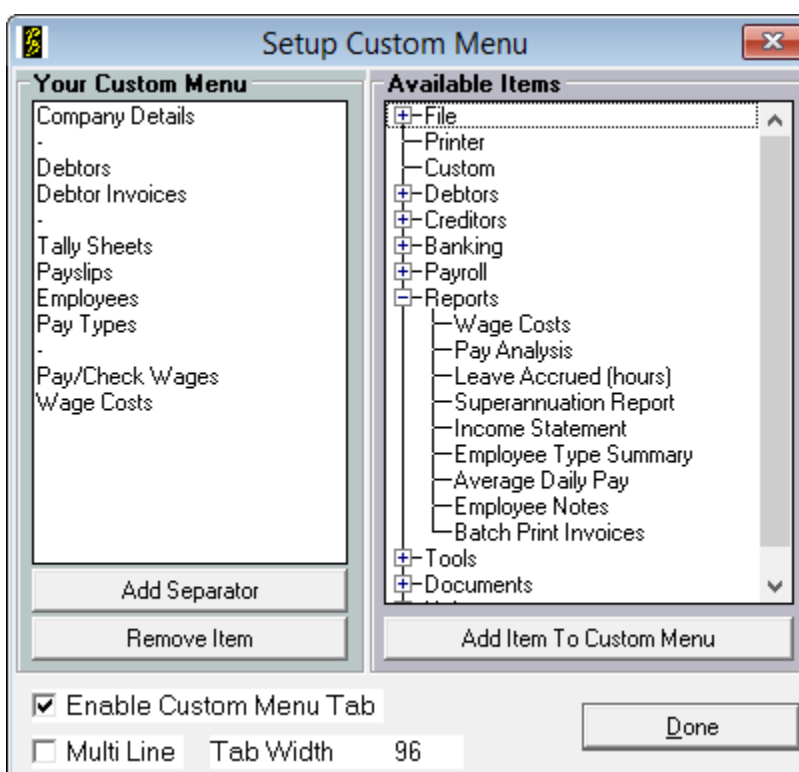


Figure 1: Configure Custom Menu

Field	Description
Your Custom Menu	Displays the list of menu options currently in your custom menu.
Add Separator	Use this to add a line between Your Custom Menu options. You can click and drag this line to change its position.
Remove Item	To remove an item from Your Custom Menu select the option and click on Remove Item . It will be removed from the list.

Continued...

Field	Description
Available Items	Displays the list of available menu and reports that can be added to the custom menu. Click on the + to the right of menu headings to expand the options within the menu.
Add Item To Custom Menu	To add new options to the menu, find the menu option in the Available Items list, click the desired item so it is highlighted, then click on Add Item To Custom Menu . New items will automatically be added to the bottom of the Your Custom Menu list. Click and drag the items in the list to their preferred position.
Enable Custom Menu Tab	Tick to set up a custom tab on the left side of the application window for quick access to the items you use most. Remove the tick to disable the custom menu tab.
Multi Line	Tick to allow multi-line buttons on the tab menu for clarity.
Tab Width	Change this setting to adjust the width of the custom menu tab.
Done	Click to save changes and close the window. All changes will take effect once you log out and back in.

Using the Custom Menu

Once configured and enabled, the custom menu will appear at the left side of the application window when a user logs in.

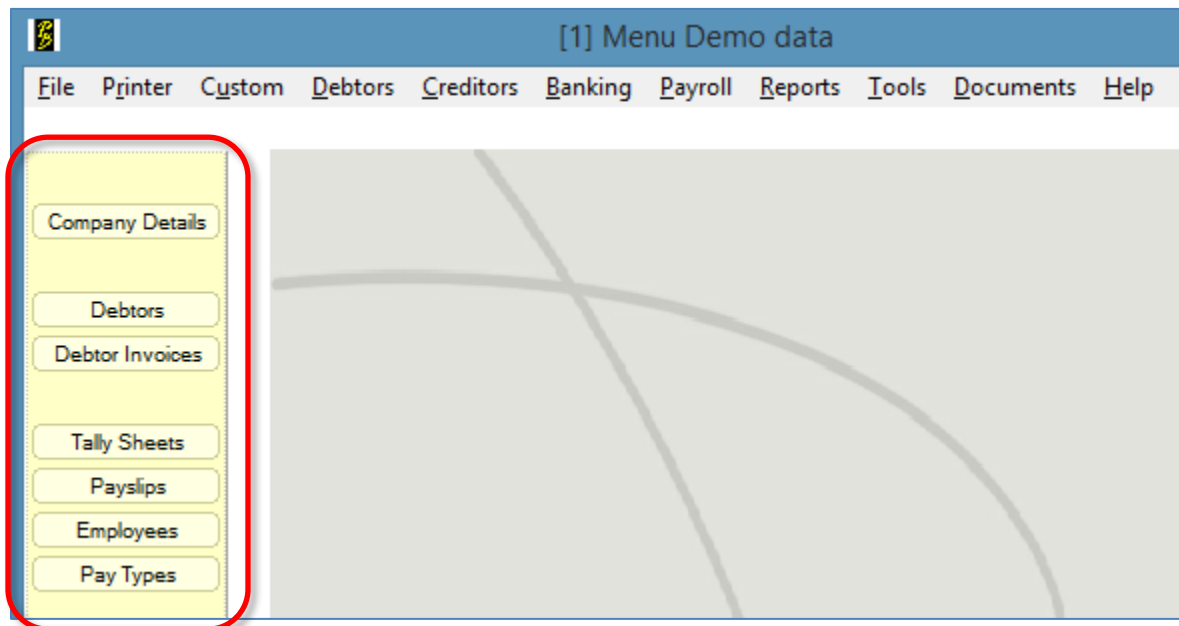


Figure 2: Custom Menu

- The items in the custom menu appear in the configured order at the left hand side of the application.
- The menu items also appear in the Custom drop down menu.
- When you click on an option in the custom menu, the system will automatically close the current screen and open the new screen.
- You can automatically close all screens by clicking in the blank yellow section at the top of the custom menu.

Add a Report to the Custom Menu

You can add custom reports that you run frequently to the custom menu so you can open the report quickly without needing to go through the **File > Custom Report** menu options.

PayBiz Main Menu > Custom > Configure Custom Menu

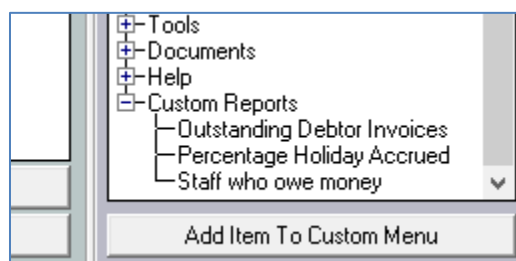


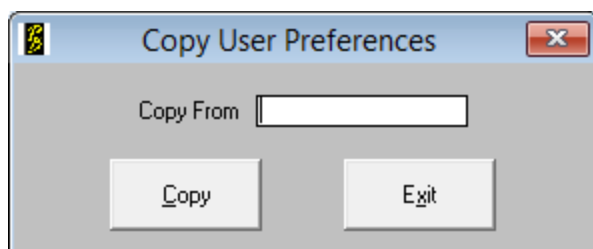
Figure 3: Custom Reports

- Click on the + beside **Custom Reports** in the **Available Items** list to display the custom reports available.
- Select the custom report to add to the custom menu.
- Click **Add Item To Custom Menu**.
- You will now be able to run or edit the report directly from the custom menu side bar.

Copy Custom Menu Settings to a New User

PayBiz Main Menu > File > User File

- Open the new user file details.
- Click on the **Copy Preferences** button:



- Enter the User Id, or hit F8 for a lookup to pick from, of the user who has the settings you want to copy to the new user.
- Click the **Copy** button.
- The new user will then need to log in and tick **Enable Custom Menu Tab** in **Custom > Configure Custom Menu** to activate the custom menu with the copied settings.