# How to Update User Panel - Canned Panel Copy

Through Panel Settings > Apply to Users:

- 1. Activate a Canned Panel.
- 2. Open the Canned Panel and modify. Hit Save button and OK on warning message. Panel Settings - TEST CANNED PANEL ~ □ × Details Settings ✓ Rows Retrieved 0 Class Master Panel Name \* TEST CANNED PANEL ~ Panel Caption TEST CANNED PANEL Style Grid ✓ Rows Visible 5 ~ Description select \* from tblCFTransaction Ouerv ✓ Date Condition None ✓ Date Field Connection i21 Other Filter: ✓ Filter Variable ∨ Filter Field None Drill Down V Auto Refresh panel every 1 ≎ Minute None ✓ Descending Owner Order By: ? 🔘 🖓 🖂 Ready 🕅 🖣 Page 1 of1 ▶ ▶ Panel Settings - TEST CANNED PANEL Details Settings Panel Name \* TEST CANNED PANEL Class Master ✓ Rows Retrieved 0 Panel Caption TEST CANNED PANEL Style Grid ✓ Rows Visible 0 Description select \* from tblC Query iRely i21 This will update user panels and reset their settings. Do you wish to continue? Date Condition None Other Filter: None ✓ Auto Refresh panel every 1 Minute Drill Down Order By: ✓ Descending ? 🔘 🖓 🖂 Ready 1 of 1 Page

#### 3. Hit Apply to Users button and Yes on warning message.

Panel Settings -	TEST CANNED PANEL						^ 🗆 X
New - Save							
Details Settin	ngs						
Panel Name ,	* TEST CANNED PANEL		Class	Master	✓ Rows Retrieved	0	~
Panel Caption	TEST CANNED PANEL		Style	Grid	✓ Rows Visible	0	~
Description							
Ouerv	select * from tblCl						
		i This will update us Do y	iRely i21 er panels and re ou wish to contir (es No	eset their set	tings.		
Connection	i21	✓ Date Condition	None	~ I	Date Field		~
Other Filter:	None	✓ Filter Variable		~ 1	Filter Field		~
Drill Down	None	V 🗌 Auto Refresh	panel every 1	Minute     Minute			
Owner		Order By:		~	Descending		
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4. The changes can be verified by opening the activated canned panel copy on **Panel List > Active Panels** by hitting **Edit** button.

New - Save	Undo Delete Dupl	licate Deactiva	e Search Refre	sh Query Builder	User Access F	Pull Push Close	
Details Set	tings						
Panel Name	* TEST CANNED PAN	EL		Class	s Master	✓ Rows Retrieved	0 ~
Panel Caption	TEST CANNED PAN	EL		Style	Grid	✓ Rows Visible	0 ~
Description							
Query	select * from tblCF	Transaction					
Connection	i21	~	Date Condition	Noos	~	Date Field	~
CONTICCTON	· • ·						
Other Filter:	None	~	Filter Variable		~	Filter Field	~
Other Filter: Drill Down	None	~	Filter Variable	panel every 1	↓ ♦ Minute	Filter Field	~
Other Filter: Drill Down Owner	None None irelyadmin ×	× ×	Filter Variable Auto Refresh Order By:	panel every 1	V Minute	Filter Field	~ ~

## Through Panel Settings > Pull:

1. Provided that the Canned Panel has been modified already.

## 2. Hit Save button and OK on warning message.

Panel Settings -	TEST CANNED PANEL						^ 🗆 X
New - Save							
Details Settin	ngs						
Panel Name 🖌	* TEST CANNED PANEL		Class	Master	<ul> <li>Rows Retrieved</li> </ul>	0	~
Panel Caption	TEST CANNED PANEL		Style	Grid	✓ Rows Visible	0	~
Description							
Query	select * from tblC						
			iDaly i24				
		This will update	IREIY IZ1	eset their settir	nas.		
		Do	you wish to conti	nue?			
			Yes		_		
Connection	121	✓ Date Condition	None	✓ Da	te Field		~
Other Filter:	None	✓ Filter Variable		→ Filt	er Field		~
Drill Down	None	V Auto Refres	h panel every 1	\$ Minute			
Owner		Order By:		<b>~</b>	Descending		
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3. Close the canned panel. Open the activated canned panel copy on **Panel List** > **Active Panels** by hitting **Open** button.

## 4. Hit Pull button.

Panel Settings -	TEST CANNED	PANEL								^ □ X
New - Save	Undo Delete	Duplicate	Deactivate	Search Refre	sh Query Bi	uilder	User Access		l Push Close	
Details Settin	igs								Update panel	
Panel Name 🔸	TEST CANNED	PANEL				Class	Master		✓ Rows Retrieved 0	~
Panel Caption	TEST CANNED	PANEL				Style	Grid		<ul> <li>Rows Visible</li> </ul>	~
Description										
Query	select * from	tblCFTransa	action							
Connection	i21		~	Date Condition	None			~	Date Field	~
Other Filter:	None		~	-ilter Variable				$\sim$	Filter Field	×
Drill Down	None		~	Auto Refresh	panel every	1	≎ Minu	ute		
Owner	irelyadmin	×	~ 1	Order By:				~	Descending	
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## 5. Changes on the canned panel will be pulled.

Panel Settings -	TEST CANNED PANEL									^	⊢ ×
New - Save	Undo Delete Duplicate I	Deactivat	e Search Refre	sh Query B	uilder	User Access	Pull	Push Close			
Details Settin	ngs										
Panel Name	* TEST CANNED PANEL				Class	Master	、 、	<ul> <li>Rows Retrieve</li> </ul>	d 0		~
Panel Caption	TEST CANNED PANEL				Style	Grid	`	Rows Visible	0		~
Description											
Query	select * from tblCFTransac	tion									
Connection	i21	~	Date Condition	None		~	/ Dat	e Field			$\sim$
Other Filter:	None	~	Filter Variable			~	/ Filte	er Field			$\sim$
Drill Down	None	~	Auto Refresh	panel every	1	Minut     Minut	te				
Owner	irelyadmin ×	~	Order By:			~	-	Descending			
2 <b>CD</b> Q	Readv							Id d Pa	ge	1 of 1	
) .									-		

## Through Dashboard > New Canned Panel Version Indicator:

1. Activate a canned panel and display it on dashboard.

	-0-										
anel Name	TEST CANNED	PANEL				Class	Master	~	Rows Retrieve	d 0	
anel Caption	TEST CANNED	PANEL				Style	Grid	~	Rows Visible	10	
escription											
luery	select * from t	bICFTrans	action								
nnection	i21		~	Date Condition	None			▼ Dat	e Field		
nnection her Filter:	121 None		×	Date Condition	None			✓ Dat	e Field		
nnection her Filter: ill Down	i21 None None		× × ×	Date Condition Filter Variable	None	1	↓ ↓ Mir	✓ Dat ✓ Filte	e Field		

#### 2. Modify a canned panel.

Panel Settings	- TEST CANNED	PANEL	Defect									
New + Save	Undo Delete	Search	Refresh	Query Builder	Apply to Users	Close						
Details Sett		DANE				Class			Power Potriovo	4		
	* TEST CANNED	PANEL				Cass	Iviaster		Nows Nethevel			
Parlel Caption	TEST CANNED	PANEL				Style	Grid	Y	NOWS VISIBLE	U		Ň
Description												
Query	select * from t	bICFTrar	nsaction									
Connection	i21			✓ Date Condit	tion None		~	Date F	ield			
Other Filter:	None			✓ Filter Variab	ble		~	Filter F	ield			
Drill Down	None			✓ Auto Ref	resh panel ever	y 1	↓ Minute	e				
Owner				Order By:			~	De	scending			
									0			
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- Once modified close the Panel Settings and Panel List.
   Log out on i21 and re-login.

- 5. From Dashboard main menu, click Display Dashboard button to populate the tabs.
  6. Go to the tab where canned panel copy is placed. Noticed the indicator. This is a mark that the panel is outdated.

= <mark>~</mark> '	IESI ONNINED P	ANEL				
intTransar		T		ulate	dblCalculated	ysninvalid
	A new copy of yo	our panel is ava	ilable. Click the	update.		
2		3/4/2016	\$0.00	\$0.00	\$0.00	INO
3	10	3/4/2016	\$0.00	\$0.00	\$0.00	No
4	3.5	3/4/2016	\$0.00	\$0.00	\$0.00	No
5	52	3/4/2016	\$0.00	\$0.00	\$0.00	No
6	27.2	3/4/2016	\$0.00	\$0.00	\$0.00	No
7	10	3/7/2016	\$0.00	\$0.00	\$0.00	No
8	140	3/7/2016	\$0.00	\$0.00	\$0.00	No
9	20.1	4/1/2016	\$0.00	\$0.00	\$0.00	No
10	25	4/1/2016	\$0.00	\$0.00	\$0.00	No
11	15.5	4/1/2016	\$0.00	\$0.00	\$0.00	No
			\$0.00	\$0.00	\$0.00	

7. Hit the indicator and select **Yes** on warning message.

= 0 IB						
intTransactio	dblQuantity	dtmTransacti	dblCalculated	dblCalcu	ulated dblCalculated vsnInvalid	
2	11	3/4/2016	\$0.00	\$0.00		
3	10	3/4/2016	\$0.00	\$0.00		
4	3.5	3/4/2016	\$0.00	\$0.00		
5	52	3/4/2016	\$0.00	\$0.00		
6	27.2	3/4/2016	\$0.00	\$0.00		
7	10	3/7/2016	\$0.00	\$0.00		iRely i21
8	140	3/7/2016	\$0.00	\$0.00	This will update	your papel and reset its settings
9	20.1	4/1/2016	\$0.00	\$0.00	Do	you wish to continue?
10	25	4/1/2016	\$0.00	\$0.00		
11	15.5	4/1/2016	\$0.00	\$0.00		Yes No
			\$0.00	\$0.00	\$0.00	

#### 8. Dashboard Panel will get updated.

■ TEST CA	NNED PANEL					
intTransactio	dblQuantity	dtmTransacti	dblCalculated	dblCalculated	dblCalculated	ysninvalid
2	11	3/4/2016	\$0.00	\$0.00	\$0.00	No
3	10	3/4/2016	\$0.00	\$0.00	\$0.00	No
4	3.5	3/4/2016	\$0.00	\$0.00	\$0.00	No
5	52	3/4/2016	\$0.00	\$0.00	\$0.00	No
6	27.2	3/4/2016	\$0.00	\$0.00	\$0.00	No
7	10	3/7/2016	\$0.00	\$0.00	\$0.00	No
8	140	3/7/2016	\$0.00	\$0.00	\$0.00	No
9	20.1	4/1/2016	\$0.00	\$0.00	\$0.00	No
10	25	4/1/2016	\$0.00	\$0.00	\$0.00	No
11	15.5	4/1/2016	\$0.00	\$0.00	\$0.00	No
12	9.2	4/1/2016	\$0.00	\$0.00	\$0.00	No
13	15.8	4/11/2016	\$0.00	\$0.00	\$0.00	No
14	15	6/29/2016	\$0.00	\$0.00	\$0.00	No
15	50	6/29/2016	\$0.00	\$0.00	\$0.00	No
16	30	7/22/2016	\$0.00	\$0.00	\$0.00	No
17	41.2	7/25/2016	\$0.00	\$0.00	\$0.00	No
18	15.85	7/25/2016	\$0.00	\$0.00	\$0.00	No
19	21.02	7/25/2016	\$0.00	\$0.00	\$0.00	No
20	6.58	7/26/2016	\$0.00	\$0.00	\$0.00	No
21	10.25	7/26/2016	\$0.00	\$0.00	\$0.00	Yes
22	12.6	7/25/2016	\$0.00	\$0.00	\$0.00	No
23	15.68	7/26/2016	\$0.00	\$0.00	\$0.00	No
24	15.86	10/21/2016	\$0.00	\$0.00	\$0.00	No
25	14.48	10/1/2016	\$0.00	\$0.00	\$0.00	No
26	14.28	10/11/2016	\$0.00	\$0.00	\$0.00	No
27	13.78	10/18/2016	\$0.00	\$0.00	\$0.00	No
28	15.27	10/27/2016	\$0.00	\$0.00	\$0.00	No

9. Check the changes by opening the activated canned panel copy on Panel List > Active Panels by hitting Open button.

Panel Settings -	TEST CANNED	PANEL											□ ×
New - Save	Undo Delete	Duplicate	Deactivate	Search Refre	ish Query Bi	uilder	User Access	Pull P	ush Clo	se			
Details Settin	ngs												
Panel Name	TEST CANNED	D PANEL				Class	Master	~	Rows R	etrieved	0		~
Panel Caption	TEST CANNED	D PANEL				Style	Grid	~	Rows Vi	isible	0		~
Description													
Query	select * from	tblCFTransa	action										
query													
Connection	i21		~ [	Date Condition	None			V Date	Field				~
Other Filter:	None		× 1	Auto Pafrach			<u>^</u>	<ul> <li>Filte</li> </ul>	r Field				~
Owner	None	V	× [	Auto Kerresh	panel every	1	V Minu	ite	Descendir				
Owner	reiyadmin	^	Ŭ,	order by:				× 🗆	Descendir	1g			
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Any changes to canned panel may be overwritten upon version upgrade.

## Through Panel Settings > Apply to Users:

1. Activate a Canned Panel.

2. For the purpose of checking if the changes cascade, open the activated canned panel copy on Panel List > Active Panels by hitting Edit button.



3. Close the user's copy and Open the Canned Panel and modify.

anel Name:	Rely AG - Cus	stomers Ove	er Credit Lin	nit		Class:	Master	~	Rows Retrieved	i: 0	
anel Caption: i	iRely AG - Cus	stomers Ove	er Credit Lin	nit		Style:	Grid	*	Rows Visible:	30	
									-		
scription:											
	Colort parties	est paque la		ut sacus	last nam		t pages i	first name	pagement page	and limit	
ary:	agcusmst.agc	us_ar_futu	re+agcusm	st.agcus_a	asc_nama ar_per1+a	gcusmst.ag	gcus_ar_	per3+agcu	smst.agcus_ar_p	er2+agcusmst	.agcus_
	ar_per4+agcu agcusmst.agc	us cred lin	s_ar_per5-a nit-	gcusmst.a	igcus_cre	d_reg-agcu	smst.ago	us_cred_p	pd As 'Total Bala	nce',	
	(aocusmst.ao	cus ar futu	ure+adcush	nst.aocus	ar per1+	aocusmst.a	iacus ar	per3+aoc	usmst.adcus ar	per2+aocusms	t.adcus
te Condition: 1	None		*		ible:		~				
ner Filter:	None		9.4				$\sim$				
her Filter:	None		Q ¥	Filter Varia	able:		~	Filter Fiel			0
ner Filter:	None 121		Q ¥	Filter Varia Owner:	able:	nned Panel	¥	Filter Field	d: n: None		٩
ier Filter:	None 121 Conditional	Format	Q ¥	Filter Varia Owner:	able: Ca	nned Panel	Y	Filter Field	d: n: None		Q
nnection: I Column Settings	None I21 Conditional O Fill Colum	Format	Q ♥ Q ♥ e Up ♥ M	Filter Varia	able: Ca	nned Panel	Y	Filter Field	d: n: None		٩
ner Filter:	None I21 Conditional O Fill Columne Ca	Format 16 A Mov ption	Q ▼ Q ▼ e Up ▼ M	Filter Varia Owner: ove Down Width	able: Ca S Clear Align	Layout	ter	Filter Field	d: None Drill Do	wn Column	
nnection: 1 Column Settings Remove Column Nam agcus_key	None I21 Conditional O Fill Colum re Ca Cu	Format ns   Mov ption stomer #	Q ▼ Q ▼ e Up ▼ M	Filter Varia Owner: ove Down Width 232	Ca	Layout Foo	ter	Filter Field Drill Dow	d: None Drill Do	wn Column	
ner Filter: P nnection: I Column Settings Remove Column Nam agcus_key agcus_last_r	None I21 Conditional Pill Colum re Ca Ca name Ca	Format ns A Mow option stomer # stomer Last	e Up 🔻 M	Filter Varia Owner: ove Down Width 232 231	Ca Ca Clear Align Left Left	Layout Foo	ter	Filter Field Drill Dow	d: None Drill Do	wn Column	
ner Filter: nnection: Column Settings Remove Column Nam agcus_key agcus_last_r agcus_first_i	None I21 Conditional Pill Column Ne Ca Cu name Cu name Fill	Format ns A Mov sption stomer # stomer Last st Name	e Up 🔻 M	Filter Varia Owner: ove Down Width 232 231 231	Ca Ca Clear Align Left Left Left	Layout Foo	ter	Filter Field	t: None Drill Do	wn Column	٩
ner Filter: [ nnection: [ Column Settings Column Settings Column Nam agcus_key agcus_last_r agcus_first_ agcus_cred_	None Conditional Fill Columne Caname Caname Fill Jimit Critical Caname	Format ns A Mow option stomer # stomer Last st Name edit Limit	e Up 🔻 M	Filter Varia Owner: ove Down Width 232 231 231 231	Ca Ca Clear Align Left Left Right	Inned Panel Layout Foo Sun	ter	Filter Field Drill Dow Format \$####.0	d: None Drill Do	wn Column	
her Filter: nnection: Column Settings Column Nam agcus_key agcus_last_r agcus_cred_ Total Balance	None Conditional Fill Colum te Ca Ca name Ca name Fin Jimit Cr te To	Format ns A Mow uption ustomer # ustomer Last st Name edit Limit tal Balance	ie Up ▼ M	Filter Varia Owner: ove Down Width 232 231 231 231 231	Ca Ca Align Left Left Right Right	Layout Foo Sun Sun	ter	Filter Field Drill Dow Format \$####.0 \$####.0	d: None Drill Do Drill Do	wn Column	

4. Hit Save button and OK on warning message.

3 Panel Settin	igs									2 🗆
New Save	Undo	Delete Refresh Query	Builder Apply	to Users	Close					
Panel Name:	iRely A	G - Customers Over Credi	t Limit		Class:	Master	~	Rows Retrieved:	0	Y
Panel Caption	: IRely A	G - Customers Over Credi	t Limit		Style:	Grid	~	Rows Visible:	30	~
Description:										
Query:	Select a agcusn ar_per- agcusn (agcus	agcusmst.agcus_key, ago ist.agcus_ar_future+ago +-agcusmst.agcus_ar_pe ist.agcus_cred_limit- mst.agcus_ar_future+ago	usmst.agcus_ usmst.agcus_i r5-agcusmst.a cusmst.agcus	last_name, ar_per1+ag agcus_cred_ ar_per1+a	agcusms cusmst.a _reg-agci ocusmst.	st.agcus_first igcus_ar_per3 usmst.agcus_i aocus_ar_per	_name, +agcus cred_pp 3+aqcu	agcusmst.agcus_c mst.agcus_ar_per id As 'Total Balanc ismst.aocus_ar_pe	red_limit, 2+agcusmst e', r2+agcusms	agcus_
Date Condition	n: None	IRely i21						×		
Other Filter:	None		Changes to ca	nned panel	may be	overwritten u	pon ver	sion upgrade.		
Connection:	i21	ditional Form			OK					٩, •
Concernation	O Fill	Columns A Move Un	Move Down	O Clear L	avout	_				
Column	Name	Caption	Width	Align	For	oter Fo	rmat	Drill Down	Column	
agcus_k	юy	Customer #	232	Left						
agcus_k	ast_name	Customer Last Name	231	Left						
📄 agcus_fi	irst_name	First Name	231	Left						
agcus_c	red_limit	Credit Limit	231	Right	Sur	m \$#	###.00			
Total Ba	lance	Total Balance	231	Right	Sur	m \$#	###.00			
Overage		Overage	231	Right	Sur	m \$#	###.00			
			25	Left						
0 😟 🖓 E	dited							14 4 Page	1	of 1

5. Hit Apply to Users button and Yes on warning message.

0.	<b>_</b>	5		C			2	1						
lew	Save	Undo	Delete	Refresh	Query Build	der Apply	to Users	Close						
anel I	Name:	iRely A	3 - Cust	omers Ov	er Credit Lin	nit		Class:	Master	~	Row	s Retrieved:	0	
anel (	Caption:	iRely A	3 - Cust	omers Ov	er Credit Lir	nit		Style:	Grid	~	Row	s Visible:	30	
escrip	otion:													
Jery:		Select agcush	agcusms ist.agcus i+agcus	st.agcus_ s_ar_futi mst.agcu s_cred_li	iRely i2	1 This will Do you y	update use	r panels a tinue?	nd reset t	heir setting	× 15.	mst.agcus_c jcus_ar_per Total Balanc	red_limit, 2+agcusm :e', r2+agcusr	ist.agcus mst.agcus
		(accus	nst.adc	us ar ful								acces of be		
te G her F	ondition: Filter:	None None	nst.aoci	us ar ful			Yes	N	•					
ite C her F	ondition: Filter: ction:	None None i21	nst.auci	us ar ful	9.4	Owner:	Yes	ned Pane		Drill Down	n: No	ne		
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te C ner f nne Colur	ondition: Filter: ction: mn Setting emove Column Na column Na	Ageusin (aocus None i21 i21 con © Fill me	ditional I Column Cap	Format	Q ▼ we Up ▼ M	Owner: love Down Width	Yes Can O Clear L Align	ned Pane ayout For	o I I	Drill Down	n: No	ne Drill Dowr	Column	
te C her F Colur	ondition: Filter: ction: mn Setting emove Column Na agcus_key agcus_key	Ageusin (aocus None i21 i21 con i21 i21 i21 i21 i21 i21 i21 i21 i21	ditional I Column Cap Cus	=ormat = ormat s  Mon tion tomer #	ve Up → M	Owner: love Down Width 232 231	Yes Can S Clear L Align Left	ned Pane ayout Foc	ter	Drill Down	n: No	ne Drill Dowr	Column	
te C her F Colur	ondition: Filter: ction: mn Setting emove Column Na agcus_key agcus_last agcus_firs	None None i21 Con Fill me name	ditional I Column Cap Cus Firs	Format	e Up ▼ M t Name	Owner: love Down Width 232 231 231	Yes Can O Clear L Align Left Left Left	ned Pane ayout Foc	kter	Drill Down	n: No	ne Drill Dowr	Column	
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te C her f Colur	ondition: Filter: ction: mn Setting emove Column Na agcus_key agcus_last agcus_firs agcus_firs agcus_crei Total Balai	None None i21 Con i21 Con i21 i21 i21 i21 i21 i21 i21 i21 i21 i21	ditional I Column Cap Cus Firs Cre Tob	Format s Mon tomer # tomer Last t Name dit Limit al Balance	ve Up → M t Name	Owner: love Down Width 232 231 231 231 231	Yes Can O Clear L Align Left Left Right Right	ayout Foc	o l iter n n	Drill Down	1: No	Drill Dowr	ı Column	
ite C her f colur Colur	ondition: Filter: ction: mn Setting emove Column Na agcus_key agcus_last agcus_firs agcus_cre Total Balai Overage	None None i21 Con I21 Con I21 I21 I21 I21 I21 I21 I21 I21 I21 I21	ditional I Column Cap Cus Firs Cre Tot	Format	ve Up 🤝 M	Owner: Nove Down Width 232 231 231 231 231 231 231	Yes Can O Clear L Align Left Left Left Right Right Right	Noned Panel ayout Foc	n n n	Drill Down	1: No	Drill Dowr	(Column	

6. The changes can be verified by opening the activated canned panel copy on Panel List > Active Panels by hitting Edit button.

C Falle	n Libe		🗂 Pan	el Setting:	5											× 🗆 ×
New	Save Undo Pull/Import	Close	New	Save	Vindo	Delete	Duplicate	2 Refresh	Query Build	ler Use	er Access	Pull	Push	Close		
Activ	Panels Canned Panels	-	Panel	Name:	iRely A	4G - Cust	omers Ove	er Credit L	imit		Class:	Master	*	Rows Retrieved:	0	*
	Panel Name Post Name VC Invoices Grid GL Details Grid Irens Status Bir Stacked	Panel Cap VC Invoice GL Details	Panel Descri	Caption: ption:	iRely A	kG - Cust	comers Ove	er Credit L	imit		Style:	Grid	Y	Rows Visible:	30	¥
	Issue Status Column Issue Status Column Stack AG Invoices Chart Bar Column Chart Double Series	Issue Stat Issue Stat AG Invoice Column C	Query		Select agcusr ar_per agcusr (aocus	agcusm nst.agcu 4+agcu nst.agcu smst.agcu	st.agcus_k ıs_ar_futuı smst.agcus ıs_cred_lin us_ar_futu	ey, agcus re+agcus s_ar_per5 nit- ire+agcus	mst.agcus_ nst.agcus_a -agcusmst.a mst.agcus	ast_nam r_per1+a gcus_cre ar_per1+	ne, agcusms agcusmst.a ed_reg-agci +agcusmst.	st.agcus_ igcus_ar_ usmst.ago agcus_ar	first_name, per3+agcus cus_cred_pp per3+agcu	agcusmst.agcus_ mst.agcus_ar_pe d As 'Total Balan smst.agcus_ar_pe	tred_limit, 2+agcusmst ce', ar2+agcusm	t.agcus_
	Sample Pivot	Sample Pi	Date (	Condition:	None			~	Date Varia	ble:		~				v
	Customers Customer Invoices Grid	Customer	Other	Filter:	None			۹. ۲	Filter Varia	ble:		Y	Filter Field			Y
E	GL Detail Test Gl	GL Detail	Conne	ction:	i21			9.4	Owner:	AG	GADMIN		Drill Down	: None		9.4
	VC Customer	VC Custor	Colu	mn Setting	s Cor	nditional	Format									
E	Billable Hours	Billable H	<b></b>	temove	😳 Fil	ll Column	s 🔺 Mov	e Up 🔻	Move Down	🚫 Clear	r Layout					
	Panel Upload Store - Cash Over and Sho Duplicate of Billable Hours iRely AG - Customers Over Ready	Panel Upk Store - Ca Duplicate iRely AG -		agcus_key agcus_last agcus_firs agcus_cre Total Bala Overage	t_name t_name d_limit nce	Caj Cui Cui Fin Cre Tot Ow	stomer # stomer Last st Name dit Limit al Balance erage	Name	width 232 231 231 231 231 231 231 231 25	Left Left Left Right Right Right Left	Sur Sur	m m m	\$####.00 \$####.00	Dhill Dow	1 Corumin	
			0 0	👔 Rea	dy									4 Page	1	of 1

## Through Panel Settings > Pull:

1. Provided that the Canned Panel has been modified already.

Panel Settings										* 🗆 X
New Save	Undo D	elete Refresh Query E	Auilder Apply	to Users	Close					
Panel Name:	iRely AG -	Customers Over Credit	Limit		Class:	Master	*	Rows Retrieved:	0	~
Panel Caption:	iRely AG -	Customers Over Credit	Limit		Style:	Grid	~	Rows Visible:	30	~
Description:										
Query:	Select age agcusmst ar_per4+ agcusmst (aocusms	cusmst.agcus_key, agc .agcus_ar_future+agcu agcusmst.agcus_ar_pe .agcus_cred_limit- t.accus_ar_future+acc	usmst.agcus_ ismst.agcus_a i5-agcusmst.a usmst.aocus	last_nami ar_per1+a igcus_crei ar per1+	e, agcusms Igcusmst.a d_reg-agcu agcusmst.a	t.agcus_i gcus_ar_ ismst.agc aocus_ar	first_name, a per3+agcus :us_cred_pp .per3+aocu	agcusmst.agcus_c nst.agcus_ar_per d As 'Total Balanc smst.agcus_ar_pe	rred_limit, 2+agcusmst :e', rr2+agcusms	agcus_
Date Condition:	None		🖌 Date Varia	ible:			Date Field:			~
Other Filter:	None	٩.	<ul> <li>Filter Varia</li> </ul>	able:			Filter Field			
Connection:	i21	٩.	• Owner:	Ca	nned Pane	1	Drill Down	None		۹, ۲
Column Settings	Condit	ional Format	-							
Remove	🔾 Fill Co	olumns 🔺 Move Up 🤜	Move Down	🚫 Clear	Layout					
Column Na	me	Caption	Width	Align	Foo	ter	Format	Drill Down	n Column	
agcus_key		Customer #	232	Left						
📄 agcus_last	name	Customer Last Name	231	Left						
agcus_first	_name	First Name	231	Left						
agcus_crec	_limit	Credit Limit	231	Right	Sur	n	\$####.00			
Total Balar	ice	Total Balance	231	Right	Sur	n	\$####.00			
Overage		Overage	231	Right	Sur	n	\$####.00			
			25	Lert						
🕜 😒 🖉 Edit	ed							4 Page	1	of 1 🕨 🕅

2. Hit **Save** button and **OK** on warning message.

New	Save	Undo	Delete Refr	esh Query B	uilder Apply	to Users	Close				
anel	Name:	iRely AG	- Customer	s Over Credit	Limit		Class: Master	*	Rows Retrieved:	0	
anel	Caption:	iRely AG	- Customen	s Over Credit	Limit		Style: Grid	¥	Rows Visible:	30	
)escri	iption:										
)uery		Select a agcusm ar_per4 agcusm (accusm	gcusmst.ago st.agcus_ar_ +agcusmst.a st.agcus_cre nst.agcus_ar	i iRely iz	1 Changes to	canned pa	nel may be overw	rritten upon '	version upgrade.	<pre>xd_limit, +agcusms , +adcusm</pre>	t.agcus_
ate ( )ther	Condition: Filter:	None None					ок				
ate ( )ther Colu	Condition: Filter: ection: umn Setting	None i21 s Cond	itional Forma	L	Owner:	Cant	OK ned Panel	Drill Dowr	n: None		Q)-
oate ( )ther Colu © F	Condition: Filter: ection: umn Setting Remove	None None 121 Cond O Fill 1	itional Forma	t Move Up	Owner:	Cant S Clear Li	OK ned Panel	Drill Dowr	n: None		
oate C other Colu	Condition: Filter: ection: umn Setting Remove Column Na	None None i21 Cond O Fill o	itional Forma Columns A Caption	t Move Up	Owner: Move Down Width	Cant O Clear Li Align	OK ned Panel nyout Footer	Drill Dowr Format	n: None Drill Dow	n Column	
Colu	Condition: Filter: ection: umn Setting Remove Column Na agcus_key accus last	None None 121 s Cond o Fill me	itional Forma Columns Caption Customer Customer	t Move Up	Owner: Move Down Width 232 231	Cant O Clear Li Align Left	OK ned Panel ayout Footer	Drill Dowr	None Drill Dow	n Column	
onne Colu	Condition: Filter: ection: amn Setting Remove Column Na agcus_key agcus_last agcus firs	None None 121 s Cond me _name	itional Forma Columns Caption Customer Customer First Nam	t Move Up 🔻 Last Name	Owner: Move Down Width 232 231 231	Cant Cant Align Left Left	OK ned Panel ayout Footer	Drill Dowr	1: None Drill Dow	n Column	
oate ( other conne colu	Condition: Filter: ection: amn Setting Remove Column Ne agcus_key agcus_last agcus_firs agcus_firs	None None 121 Cond Fill Imme Lame Lame	itional Forma Columns Caption Customer First Nam Credit Lir	t Move Up 🔻 Last Name ie nit	Owner: Move Down Width 232 231 231 231	Cant Cant Cant Cant Align Left Left Left Right	OK ned Panel ayout Footer Sum	Drill Dowr Format	1: None Drill Dow	n Column	Q.
Colu	Condition: Filter: ection: amn Setting Remove Column Ne agcus_key agcus_last agcus_firs agcus_firs agcus_cret Total Balai	None None 121 Cond Pill of me t_name t_name d_limit nce	itional Forma Columns Caption Customer First Nam Credit Lir Total Bala	t Move Up = # Last Name ie nit ance	Move Down Width 232 231 231 231 231	Cant Cant Align Left Left Right Right	OK hed Panel ayout Footer Sum Sum	Format	12 None Drill Dow	n Column	Q.
Colu	Condition: Filter: ection: umn Setting Remove Column Ne agcus_key agcus_last agcus_firs agcus_firs agcus_cre Total Balai Overage	None None 121 Cond Fill of me name tname d_limit nce	itional Forma Columns Caption Customer First Nam Credit Lir Total Bali Overage	t Move Up 💌 # :Last Name ie nit innce	Owner: Move Down Width 232 231 231 231 231 231	Cant Align Left Left Right Right Right	OK ned Panel ayout Footer Sum Sum Sum	Drill Down	Drill Dow	n Column	

3. Close the canned panel. Open the activated canned panel copy on Panel List > Active Panels by hitting Edit button.

-				C) Pa	nel Setting:	5													8 🗆 🗙
Ne	o. 🔐 💟 w Save U	ndo Pull/Imp	ort Close	New	- 😭	VINdo	Delete	Duplicate	2 Refresh	Query Build	er L	Jser Access	Pull	Push	Close				
	ctive Panels C	anned Panels	-	Pane	l Name:	iRely A	4G - Custo	omers Over	Credit Li	imit		Class:	Master	`	Row:	s Retrieved:	0		*
	Panel Name VC Invoices Gri GL Details Grid	di di di di	Panel Captio VC Invoices GL Details G	Pane Desc	l Caption: ription:	iRely A	4G - Custe	omers Over	Credit Li	imit		Style:	Grid		Rows	s Visible:	20	_	~
E	Issue Status de Issue Status Co Issue Status Co AG Invoices Ch Column Chart I	Iumn Iumn Stacked art Bar ouble Series	Issue Status Issue Status AG Invoices Column Cha	Quer	у:	Select agcusr ar_per agcusr (agcusr	agcusms nst.agcus 4+agcus nst.agcus amst.agcu	t.agcus_ke s_ar_future mst.agcus_ s_cred_limi us_ar_futur	ey, agcus e+agcusn _ar_per5- it- 'e+agcus	mst.agcus_l nst.agcus_a agcusmst.a mst.agcus	ast_na r_per1 gcus_o ar per	ame, agcusm .+agcusmst. cred_reg-agc 1+agcusmst	ist.agcus_ agcus_ar_ usmst.ago .agcus_ar	first_name per3+agc cus_cred_l per3+ag	e, agcus usmst.a opd As ' cusmst.a	mst.agcus_o gcus_ar_per 'Total Balano agcus ar pe	cred_limit, r2+agcusm ce', ar2+agcusi	st.agcu nst.agc	is_ ∎ us ▼
E	Sample Pivot		Sample Pivo Customers	Date	Condition:	None			~	Date Varia	ole:								Y
E	Customer Invoi	es Grid	Customer In	Othe	r Filter:	None			4 ¥	Filter Varia		AGADMIN		Drill Dov	ld:	ne			× 4 •
E	] Test GL VC Customer		Test GL VC Custome	Co	lumn Setting	s Cor	nditional P	ormat											
E	Billable Hours		Billable Hou	0	Remove	🔘 Fil	II Columns	🔺 Move	Up 🔻 I	Move Down	🚫 Cle	ear Layout							
	Panel Upload Store - Cash O Duplicate of Bil Rely AG - Cust	er and Short able Hours omers Over C	Panel Uploa Store - Cash Duplicate of iRely AG - C		Column Na agcus_key agcus_last agcus_firs agcus_cre Total Bala Overage	ame t_name t_name d_limit nce	Cap Cus Cus Firs Crea Totz Ove	tion tomer # tomer Last N t Name dit Limit el Balance rage	lame	Width 232 231 231 231 231 231 231 231 25	Align Left Left Right Right Left	Fc Sk Sk Sk	im im im	Format \$####; \$####;	00 00 00	Drill Dowr	n Column		
				0	🧿 🏆   Rea	dy									ŀ	4 4 Page	1	of 1	

#### 4. Hit Pull button.

New	Save	Undo	Delete	Duplicate	Refresh	Query Buil	der Us	Ver Access	Pull	Push	Close		
anel Na	ame:	iRely A	G - Cust	omers Ove	er Credit L	.imit		Class:	Master	*	Rows Retrieved:	0	1
anel Ca	aption:	iRely A	3 - Cust	omers Ove	er Credit L	.imit		Style:	Grid	*	Rows Visible:	20	
Descripti	ion:												
luery:		Select a	agcusms ist.agcu	t.agcus_k s_ar_futu	re+agcus	smst.agcus_ mst.agcus_	last_nar ar_per1+	ne, agcusn Fagcusmst.	ist.agcus_ agcus_ar_	first_name, a _per3+agcus	agcusmst.agcus_o mst.agcus_ar_per	red_limit, 2+agcusms	t.agcus_
		ar_per4 agcusm	+agcus ist.agcu	mst.agcus s_cred_lin	s_ar_per5 nit-	-agcusmst.a	igcus_ci	ed_reg-ago	usmst.ag	cus_cred_pp	d As 'Total Balanc	te',	
		(adcus	nst.adci	us ar futu	ire+adcu	smst.adcus	ar peri	+aocusmst	.aocus ai	Der3+adcu:	smst.aocus ar be	r2+adcusm	st.adcus
into Cor	ndition:	Nono			V								
ate coi	indicion.	None											
ther Fil	Iter:	None			٩.~	Filter Vari	able:			Filter Field			
)ther Fil	lter: tion:	None i21			Q ¥	Filter Vari	able:	GADMIN		Filter Field	None		Q
ther Fil	lter: tion:	None i21	Etimo I (		Q ~	Filter Vari Owner:	able:	GADMIN		Filter Field	: None		Q.
ther Fil onnecti Columr	lter: tion: n Settings	None i21 Con	ditional f	format	<b>Q</b>   ♥	Filter Vari	able:	GADMIN		Filter Field	None		٩
ther Fil onnecti Column	Iter: tion: n Settings move	None i21 Con O Fill	ditional F Columns Can	format s 🔺 Mow	Q ¥ Q ¥ e Up ▼	Owner: Move Down	able:	GADMIN ar Layout	vter.	Filter Field	None	1 Column	4
ther Fil onnecti Column Column	Iter: tion: n Settings move column Nar	None i21 Conr O Fill me	ditional F Columns Cap	format s 🔺 Mow tion	Q ¥ Q ¥ eUp ₹	Filter Vari Owner: Move Down Width 232	able: A	GADMIN ar Layout Fo	oter	Filter Field Drill Down	: None Drill Dowr	1 Column	
ther Fil onnecti Column Column Column Column Column Column Column Column Column Column Column Column Column	lter: tion: n Settings move column Nar gcus_key gcus_last	None i21 Con O Fill me	ditional F Columns Cap Cus Cus	Format Mow tion tomer # tomer Last	e Up 💌	Move Down Width 232 231	able: A Align Left Left	GADMIN ar Layout Fo	oter	Filter Field	None Drill Dowr	1 Column	
Column Co	Iter: tion: n Settings move column Nar gcus_key gcus_last_ gcus_first	None i21 Coni i21 i21 i21 i21 i21 i21 i21 i2	ditional F Column Cap Cus Firs	format	e Up 💌	Move Down Width 232 231 231	Align Left Left	GADMIN ar Layout Fo	oter	Format	: None Drill Dowr	1 Column	
Column Co	lter: tion: n Settings move column Nar gcus_key gcus_last_ gcus_first gcus_cred	None i21 Con Fill me name _name	ditional F Columns Cap Cus Firs Cre	Format	e Up 🔻	Move Down Width 232 231 231 231	Clea Align Left Left Right	GADMIN ar Layout Fr	oter m	Format	Drill Dowr	1 Column	
Column Co	lter: tion: n Settings move column Nar gcus_key gcus_last gcus_first gcus_cred otal Balan	None i21 Con Fill me name limit ce	ditional F Columns Cus Cus Firs Cre Tota	format Mow tion tomer # tomer Last t Name dit Limit al Balance	e Up 🔻	Move Down Width 232 231 231 231 231	Align Left Left Right Right	IGADMIN ar Layout Fr Si Si Si	koter im im	Format	: None Drill Dowr	n Column	
Column Co	Iter: tion: n Settings move column Nar gcus_key gcus_last_ gcus_first, gcus_cred otal Balan Werage	None i21 Con Fill me _name _limit ce	ditional F Columns Cap Cus Firs Cre Tota Ove	format Mow tion tomer # tomer Last t Name dit Limit al Balance rage	e Up 🔻	Move Down Width 232 231 231 231 231 231 231	Align Left Left Right Right Right	IGADMIN ar Layout Fr Si Si Si Si Si	koter im im im	Filter Field           Drill Down           Format           \$####.00           \$####.00           \$####.00	: None Drill Dowr	n Column	

5. Changes on the canned panel will be pulled.

Panel Setting	IS												2	
New Save	VINdo	Delete	Duplicate	2 Refresh	Query Buil	der	User Access	Pull		Push				
Panel Name:	iRely A	G - Cust	omers Ove	r Credit L	mit		Class	: Maste	r	~	Rows Retriev	ed: 0		~
Panel Caption:	iRely A	G - Cust	omers Ove	r Credit L	imit		Style	Grid		*	Rows Visible	: 30		*
Description:														
Query:	Select agcusr ar_per agcusr (agcus	agcusm: nst.agcu 4+agcus nst.agcu mst.agcu	st.agcus_k is_ar_futur smst.agcus is_cred_lin us_ar_futu	ey, agcus e+agcus _ar_per5 nit- ne+aocus	mst.agcus_ nst.agcus_a agcusmst.a mst.agcus	last_n ar_per agcus_ ar_pe	iame, agcus 1+agcusms _cred_reg-a r1+agcusm	mst.agcu t.agcus_a pcusmst.a st.aocus	us_fi ar_p agcu ar	rst_name, a er3+agcusr is_cred_ppi per3+aocus	gcusmst.agc nst.agcus_ar d As 'Total Ba mst.agcus_a	us_cred_limit _per2+agcusr alance', r_per2+agcus	, mst.agcus_ smst.aocus	-
Date Condition:	None			~	Date Varia	able:				Date Field:				$\sim$
Other Filter:	None			٩, •	Filter Varia	able:				Filter Field:				v
Connection:	i21			۹. ۲	Owner:		AGADMIN			Drill Down:	None		Q	<b>\ \</b>
Column Setting	js Cor	ditional I	Format											
Remove	🗿 Fil	l Column	s 🔺 Mow	e Up 🔻	Move Down	<b>O</b> 0	lear Layout							
Column N	ame	Cap	otion		Width	Align		Footer		Format	Drill I	Down Column		
agcus_ke	y .	Cus	tomer #		232	Left								
agcus_las	t_name	Cus	tomer Last	Name	231	Left								
agcus_fin	st_name	Firs	it Name		231	Left								
agcus_cre	ed_limit	Cre	dit Limit		231	Right	1	Sum		\$####.00				
Total Bala	ince	Tot	al Balance		231	Right		Sum		\$####.00				
Overage		Ove	erage		231	Right	1	Sum		\$####.00				
					25	Left								
🙆 🤨 🤶 Rei	ady										14 4 P	age	1 of 1 🕨	- M

#### Through Panel List > Apply to Users:

1. For the purpose of checking if the changes cascade, open the activated canned panel copy on Panel List > Active Panels by hitting Edit button.



2. Provided that the Canned Panel has been modified already.

O- New	Save	Undo E	elete Refresh Q	uery Build	ler Apply	to Users	Close						
Panel Na	me:	iRely AG	- Customers Over (	Credit Lin	nit		Class:	Master	~	Rows F	letrieved:	0	
Panel Cap	ption:	iRely AG	- Customers Over (	Credit Lir	nit		Style:	Grid	~	Rows \	risible:	30	
Descriptio	on:												
juery:		Select ag agcusms ar_per4+ agcusms (agcusms	cusmst.agcus_key t.agcus_ar_future- agcusmst.agcus_a t.agcus_cred_limit st.agcus_ar_future	, agcusn -agcusm r_per5-a - +aocusn	nst.agcus_a st.agcus_a gcusmst.a nst.agcus	last_nam ar_per1+; gcus_cre ar_per1+	e, agcusms agcusmst.a id_reg-agci -agcusmst.	st.agcus_ igcus_ar_ usmst.ago aocus_ar	first_name, per3+agcu cus_cred_p per3+agc	, agcusm ismst.agc pd As 'To usmst.ao	st.agcus_ us_ar_pe ital Balan cus ar p	cred_limit, r2+agcusm ce', er2+aocusr	st.agcus_ nst.agcus
ate Con	ndition:	None		*	Date Varia	ble:		$\vee$	Date Fiel				
Other Filt	ter:	None		۹. ۲	Filter Varia	able:			Filter Fiel				
onnecti	ion:	i21		۹. ۲	Owner:	Ca	nned Pane	ł	Drill Dow	n: None			٩
Column	Settings	Condi	tional Format										
😑 Rem	nove	🔘 Fill C	olumns 🔺 Move L	р 🔻 М	iove Down	🚫 Clear	Layout						
🖻 Co	olumn Na	me	Caption		Width	Align	For	oter	Format		Drill Dow	n Column	
ee 🔝	icus_key		Customer #		232	Left							
ee 📃	cus_last	name	Customer Last Na	me	231	Left							
ee 🔝	cus_first	_name	First Name		231	Left							
ee 🔄	cus_cred	_limit	Credit Limit		231	Right	Su	m	\$####.0	0			
To	tal Balar	ce	Total Balance		231	Right	Su	m	\$####.0	0			
	/erage		Overage		231	Right	Su	m	\$####.0	U			
OV OV					25	1.477							

3. Close the Canned Panel and on Panel List screen > Canned Panel tab, hit Apply to Users button and select Yes on warning message.



4. The changes can be verified by opening the activated canned panel copy on Panel List > Active Panels by hitting Edit button.

C) Palle	I LISL		🗘 Par	nel Settings													: 🗆 🤉
O. New	Save Undo Pull/Import	Close	New	- 😭 Save	Vindo	Delete	Duplicate	2 Refresh	Query Buil	der U	Jser Access	Pull	Push	Close			
Active	Panels Canned Panels	1	Panel	Name:	iRely A	4G - Custo	omers Over	r Credit L	imit.		Class:	Master	~	Rows Retrieved:	0		*
C Rei	move 📝 Edit		Panel	Caption:	iRely A	G - Custo	omers Over	r Credit L	.imit		Style:	Grid	~	Rows Visible:	30		~
	Panel Name	Panel Cap															
E	VC Invoices Grid	VC Invoice	Descr	iption:													
E	GL Details Grid	GL Details															
E	Issue Status Bar Stacked	Issue Stat															
13	Issue Status Column	Issue Stat	Query	c.	Select	agcusms	t.agcus_k	ey, agcus	amst.agcus_	last_na	ame, agcusm	st.agcus_	first_name,	agcusmst.agcus_	cred_limit,		
E	Issue Status Column Stack	Issue Stat			ageusr	nst.agcus	s_ar_futun mst ancus	e+agcusi ar per5	mst.agcus_a	ar_per1	+agcusmst.a	igcus_ar_	per3+agcu	smst.agcus_ar_pe od As 'Total Balan	r2+agcusms	st.agcu	š_
	AG Invoices Chart Bar	AG Invoice			agcust	nst.agcus	s_cred_lim	it-	ageasmoch	sgcus_c	cicu_icg uge	o an actory of	cus_crcu_p		,		
8	Column Chart Double Series	Column C			(accus	smst.aocu	is ar futu	re+adcus	smst.adcus	ar per:	1+adcusmst.	adcus ar	per3+adcu	ismst.adcus ar bi	er2+adcusm	nst. ad cu	JS *
6	Sample Pivot	Sample Pi	Date	Condition:	None			~	Date Varia	able:							~
E3	Customers	Customer	Othor	Ellton				0 -				~					~
	Customer Invoices Grid	Customer	Outlet	Filler.													
	GL Detail	GL Detail	Conn	ection:	i21			۹ ۲	Owner:		AGADMIN		Drill Down	n: None			۹.*
	Test GL	Test GL															
8	VC Customer	VC Custor	Coli	umn Setting	s Cor	nditional F	ormat										
	Billable Hours	Billable H	0	Remove	O Fil	II Columns	A Move	Up 🔻	Move Down		ear Lavout						
	Test ABC	Test ABC	l m	Column Na	me	Can	tion		width	Alion	Fo	oter	Format	Drill Dow	n Column		
	Panel Upload	Panel Upk		acrue kay		Cue	tomer #		232	Laft							
	Store - Cash Over and Sho	Store - Ca		ageus_hey	name	Cuet	tomer Last I	Name	231	Left							
	Duplicate of Billable Hours	Duplicate		ancus first	t name	First	Name	No The	231	Left							
	iRely AG - Customers Over	iRely AG -		ageus_me	1 limit	Crec	dit Limit		231	Right	Su	m	\$2222.0	1			
0.0	0 Roody			Total Balar	ice.	Tota	Balance		231	Right	Su	m	\$####.0	- 1			
••	⊈ Neauy			Overage		Over	race		231	Right	Su	m	\$####.0	1			
									25	Left							
			0	🦻 🏆 🛛 Rea	dy									4 Page	1	of 1	P P

Through Dashboard > New Canned Panel Version Indicator:

#### 1. Activate a canned panel and display it on dashboard.

iRely i21 - iRely Grain and	Ag Co						AGADMIN - Help -
Aenu -		Mome Grid Pivot Grid	Chart Sample Sample A Billable H	ours Randy test2 Sample B			Close
🖁 🥔 Filter Menu	Q,	D Poly 45 Outprove 0	or Coult Link				
👺 Favorites		intery AS - Customers O	ver credit binit				
System Manager		Customer #	Customer Last Name	rinst Name	Credit Umit	l'otal balance	Overage
Common Info		0000100600	11.0.111.000		181100100	1011111	
Deshboerd		0000108575	100100100	100	10.00	198110	187.1
Osplay Dashboard		0000108580	1001000010	10000	18.10	18.10	1912
Add Panel		0000109080	101000-01100	10.0	1878-181	181610	181518
Ornections		0000125500	1810111	10,710	10.00	181815	182813
@ Panels		0000129150	100.001	10000001	1000.00	12.111.0	1610610
Panel Layout		0000129240	46447499	100	18.101101	(81991)81	16,000,00
Tabs		0000143159	101103	1001	10.00	1877-181	1871-181
General Ledger		0000144970	department of	- CONTRACT -	1810010	(8)75248	177914
Financial Reports		0000146050	1012100	10000	18.00000	188139.75	100000-0
Cash Management		0000146885	delicity of the second second second second		100100100	10110010	18151.0
Credit Card Reconciliation		0000148325	10.00	1811	1000.00	100010	181815
Inventory		0000152500	1011000	10114	10.00	1000170	100010
Purchasing		0000180085	1-10/100000000		1010010	1012010	16.75215
Sales		0000181360	100000 00000 0000 0000		10.000.00	10.0010	100010
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Once modified close the Panel Settings and Panel List.
 Log out on i21 and re-login.
 From Dashboard main menu, click Display Dashboard button to populate the tabs.

# 6. Go to the tab where canned panel copy is placed. Noticed the indicator. This is a mark that the panel is outdated.

Menu	K Home Grid Pivot Gri	id Chart Sample Sample A Billable Hours	Randy test2 Sample B			Close
🚆 🥩 Filter Menu						
Favorites	Horry AG - Custo	mers Over Credit Limit				
System Manager	Customer #	Customer Last Name	First Name	Credit Limit	Total Balance	Overage
Common Info	0000100500	A W M FARMS		\$5,000.00	\$8,546.66	-\$3,546.66
ashboard [	0000108575	ANTHONY	JAMES	\$1.00	\$98.31	-\$97.31
Oisplay Dashboard	0000108580	APPLEGATE	BYRON	\$1.00	\$1.22	-\$0.22
Add Panel	0000109080	ARMERUSTER	DALE	\$250.00	\$945.84	-\$695.84
Connections	0000125500	BARRON	RUTH	\$0.00	\$149.31	-\$149.31
Panels	0000129150	BEARD	STEVEN A	\$250.00	\$1,332.93	-\$1,082.93
Panel Layout	0000129240	BEARMAN	том	\$2,000.00	\$3,490.49	-\$1,490.49
Tabs	0000143159	BOHREN	MARY	\$0.00	\$871.85	-\$871.85
Ceneral Ledger	0000144970	BRADTMUELLER	DOUGLAS L	\$5,000.00	\$5,729.48	-\$729.48
Einancial Reports	0000146050	BREMER	DANNY	\$1,000.00	\$19,231.71	-\$18,231.71
Cash Management	0000146885	BROOKFIELD SAND & GRAVEL		\$20,000.00	\$20,848.06	-\$848.06
Credit Card Reconciliation	0000148325	BUHR	RICH	\$250.00	\$386.47	-\$136.47
inventory	0000152500	BOWERS	DOYLE	\$0.00	\$825.72	-\$825.72
E Purchasing	0000180085	C W FARMS LLC		\$7,500.00	\$9,229.91	-\$1,729.91
Cales Sales	0000181360	CEDAR CREEK GOLF CLUB		\$1,000.00	\$1,354.95	-\$354.95
Payroll	0000189425	CLIFFORD FARMS - VALPO		\$0.00	\$322.49	-\$322.49
Notes Receivable	0000189500	COVERDALE FARMS		\$0.00	\$374.71	-\$374.71
Grain .	0000195100	COLLIER	MARK	\$0.00	\$386.52	-\$386.52
Contract Management	0000195142	COLLINS	ANITA	\$500.00	\$840.16	-\$340.16 *
Kisk Management				\$508.438.00	\$1,209,315,37	+\$700.877.37

## 7. Hit the indicator and select Yes on warning message.

iRely i21 - iRely Grain and Ag	Co							AGADMIN - Help -
Menu	**	Home Grid Pivot Grid Cl	hart Sample Sample A Billable Hour	Randy test2	Sample B			Close
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Pavorites		Customer # 0000100600	Customer Last Name A W M FARMS	First Na	me	Credit Limit \$5,000.00	Total Balance \$8,546.66	Overage +\$3,546.66
Deshboard		0000108575	ANTHONY	JAMES		\$1.00	\$98.31	-\$97.31
Oisplay Dashboard		0000108580	APPLEGATE	BYRON		\$1.00	\$1.22	-\$0.22
Add Panel		0000109080	ARMBRUSTER	DALE		\$250.00	\$945.84	-\$695.84
Connections		0000125500	BARRON	RUTH		\$0.00	\$149.31	-\$149.31
Panels		0000129150	BEARD	iRely i21	×	\$250.00	\$1,332.93	-\$1,082.93
Panel Layout		0000129240	BEARMAN			\$2,000.00	\$3,490.49	-\$1,490.49
Tabs		0000143159	BOHREN	<u>о</u> т	his will update your panel and reset its settings.	\$0.00	\$871.85	-\$871.85
Ceneral Ledger		0000144970	BRADTMUELLER		to you wish to continue?	\$5,000.00	\$5,729.48	-\$729.48
Financial Reports		0000146050	BREMER			\$1,000.00	\$19,231.71	-\$18,231.71
Cash Management		0000146885	BROOKFIELD SAND & GRAVEL		Yes No	\$20,000.00	\$20,848.06	-\$848.05
Credit Card Reconciliation		0000148325	BUHR			\$250.00	\$386.47	-\$136.47
Inventory		0000152500	BOWERS	DOYLE		\$0.00	\$825.72	-\$825.72
Purchasing		0000180085	C W FARMS LLC			\$7,500.00	\$9,229.91	-\$1,729.91
Sales		0000181360	CEDAR CREEK GOUF CLUB			\$1,000.00	\$1,354.95	-\$354.95
Mates Decemble		0000189425	CLIFFORD FARMS - VALPO			\$0.00	\$322.49	-\$322.49
Crain		0000189500	COVERDALE FARMS			\$0.00	\$374.71	-\$374.71
Contract Management		0000195100	COLLIER	MARK		\$0.00	\$386.52	-\$386.52
Risk Management		0000195142	COLLINS	ANITA		\$500.00	\$840.16	-\$340.16 *

## 8. Dashboard Panel will get updated.

iRely i21 - iRely Grain and Ag Co						AGADMIN - Help -
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🚆 Favorites	inery H3 • Coscorrie	ers over credit brint				
i System Manager	Customer #	Customer Last Name	Hirst Name	Credit Limit	Total Balance	Overage
Common Info	0000100600	A W M FARMS		\$5,000.00	\$8,546.66	-\$3,546.66
Dashboard	0000108575	ANTHONY	JAMES	\$1.00	\$98.31	-\$97.31
Oisplay Dashboard	0000108580	APFLEGATE	BYRON	\$1.00	\$1.22	-\$0.22
Add Panel	0000109080	ARMBRUSTER	DALE	\$250.00	\$945.84	-\$695.84
Connections	0000125500	BARRON	RUTH	\$0.00	\$149.31	-\$149.31
Panels	0000129150	BEARD	STEVEN A	\$250.00	\$1,332.93	-\$1,082.93
Panel Layout	0000129240	BEARMAN	TOM	\$2,000.00	\$3,490.49	-\$1,490.49
(Q) Tabs	0000143159	BOHREN	MARY	\$0.00	\$871.85	-\$871.85
Carl General Ledger	0000144970	BRADTMUELLER	DOUGLAS L	\$5,000.00	\$5,729.48	-\$729.48
Financial Reports	0000146050	BREMER	DANNY	\$1,000.00	\$19,231.71	-\$18,231.71
Cash Management	0000146885	BROOKFIELD SAND & GRAVEL		\$20,000.00	\$20,848.06	-\$848.06
Credit Card Reconciliation	0000148325	BUHR	RICH	\$250.00	\$386.47	-\$136.47
Inventory	0000152500	BOWERS	DOYLE	\$0.00	\$825.72	-\$825.72
Purchasing	0000180085	C W FARMS LLC		\$7,500.00	\$9,229.91	-\$1,729.91
Sales .	0000181360	CEDAR CREEK GOLF CLUB		\$1,000.00	\$1,354.95	-\$354.95
Payroll	0000189425	CLIFFORD FARMS - VALPO		\$0.00	\$322.49	-\$322.49
Crain	0000189500	COVERDALE FARMS		\$0.00	\$374.71	-\$374.71
Contract Management	0000195100	COLLIER	MARK	\$0.00	\$386.52	-\$386.52
Pick Management	0000195142	COLLINS	ANITA	\$500.00	\$840.16	-\$340.16
Crale Scale	0000196215	CONNER	MICHAEL	\$1.00	\$124.47	-\$123.47
	0000204100	COX	ANDY	\$1.00	\$872.42	-\$871.42
Manufacturing	0000213325	DR LUBRICANTS INC		\$1,000.00	\$3,282.89	-\$2,282.89
Tark Management	0000216881	RD DELAGRANGE LLC		\$0.00	\$21,291.16	-\$21,291.16
Card Fueling	0000216975	DELAGRANGE	ANDREW	\$8,000.00	\$8,713.46	-\$713.46
Store	0000217610	MAX DELAGRANGE FARMS LLC		\$20,000.00	\$20,106.34	-\$106.34
i Help Desk	0000218295	DEPUTY	MATT	\$1.00	\$129.61	-\$128.61
E Patch Update	0000218770	DICKERHOFF	JEREMY	\$0.00	\$312.82	-\$312.82
	0000242200	EEL RIVER VALLEY FARM		\$0.00	\$12,844.93	-\$12,844.93
	0000242280	EGOLF FARMS INC		\$0.00	\$160.03	-\$160.03 👻
				\$508,438.00	\$1,209,315.37	-\$700,877.37

# 9. Check the changes by opening the activated canned panel copy on Panel List > Active Panels by hitting Edit button.

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Any changes to canned panel may be overwritten upon version upgrade.

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