

How to Add Menu through Master Menu

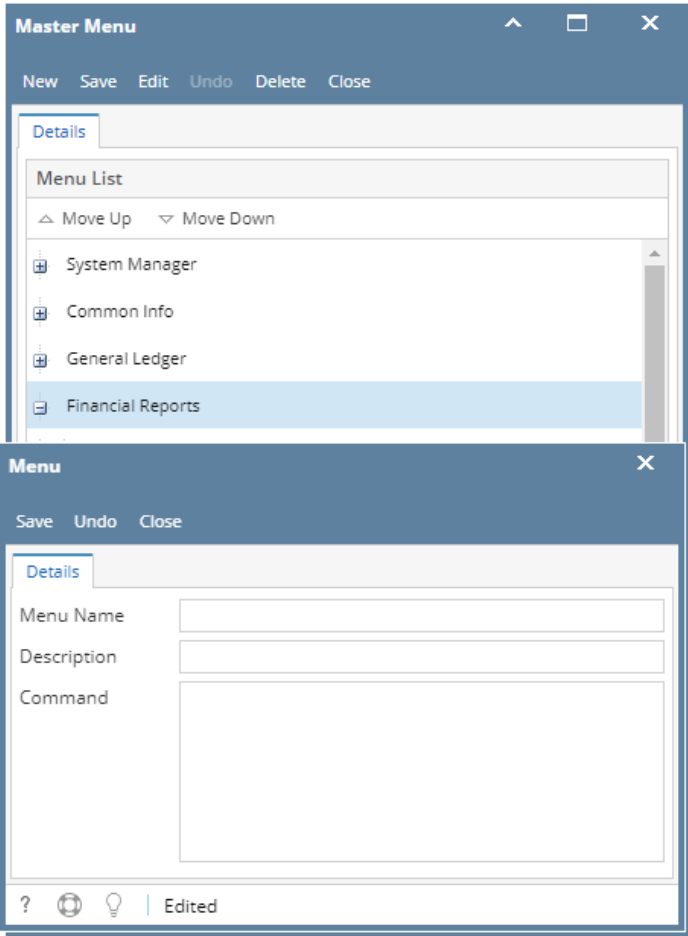
Adding of menus is done in 2 ways, one is by adding through codes or script and the other is through **Master Menu** screen.

 Adding sub menus under Origin menus is not allowed

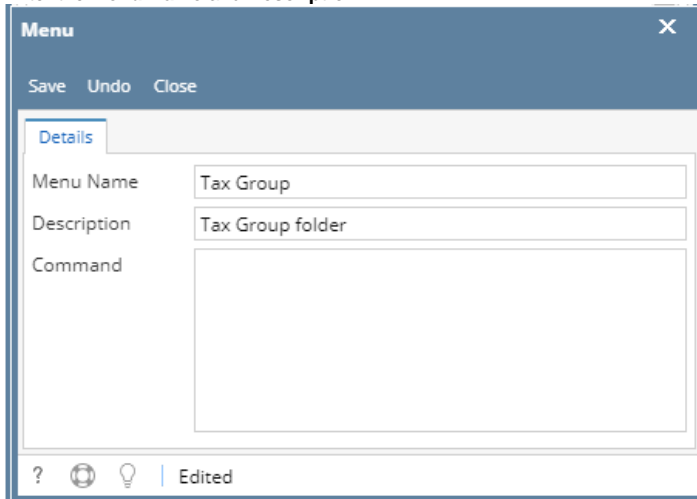
Menu	Menu Name
Description	Description for the new menu
Command	Whatever entered in this field will be opened when its menu name is clicked.

Here are the steps on how to add a new group for a module menu:

- 1. Log in as **Security** user
- 2. On the user's menu panel go to **System Manager** folder then click **Master Menu**
- 3. Select the module, then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**



Menu

Save Undo Close

Details

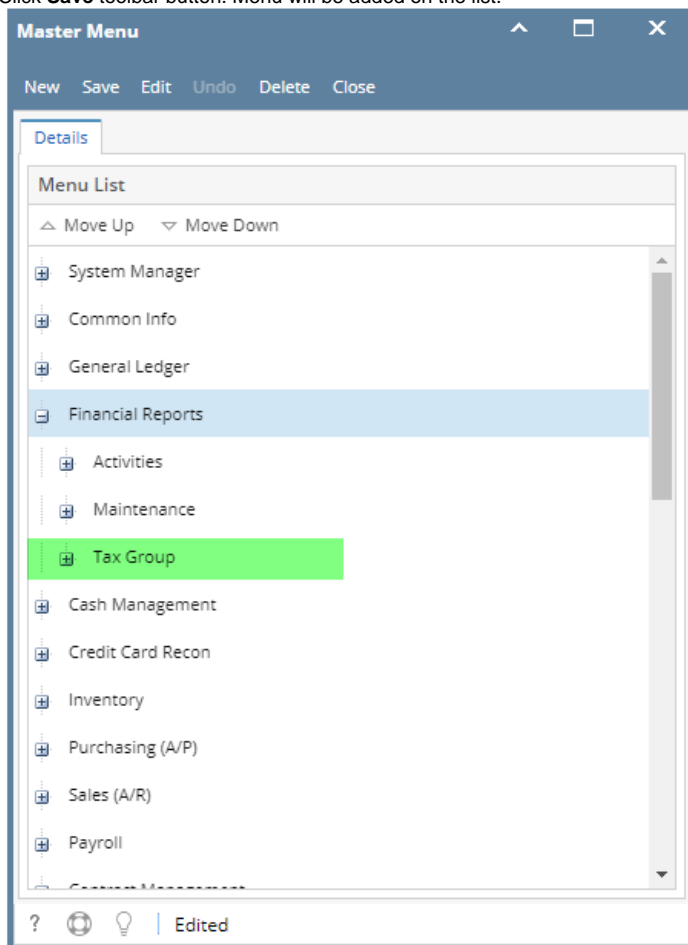
Menu Name Tax Group

Description Tax Group folder

Command

? ? ? Edited

5. Creating a group does not required a Command line, so this can be left blank
6. Click **Save** toolbar button. Menu will be added on the list.



Master Menu

New Save Edit Undo Delete Close

Details

Menu List

△ Move Up ▾ Move Down

- System Manager
- Common Info
- General Ledger
- Financial Reports
- Activities
- Maintenance
- Tax Group**
- Cash Management
- Credit Card Recon
- Inventory
- Purchasing (A/P)
- Sales (A/R)
- Payroll

? ? ? Edited

7. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**
3. Select a module then the group from the list then click **New** toolbar button. **Menu** screen will open.

4. Enter the **Menu Name, Description and Command**

Menu

Save Undo Close

Details

Menu Name: Sample Screen

Description: Sample Screen

Command: FinancialReportDesigner.view.SampleScreen?showSearch

? Edited

5. Click **Save** toolbar button. Menu will be added on the list.

Master Menu

New Save Edit Undo Delete Close

Details

Menu List

△ Move Up ▾ Move Down

- System Manager
- Common Info
- General Ledger
- Financial Reports
- Activities
- Maintenance
- Tax Group
- Sample Screen
- Cash Management
- Credit Card Recon
- Inventory
- Purchasing (A/P)
- Sales (A/R)

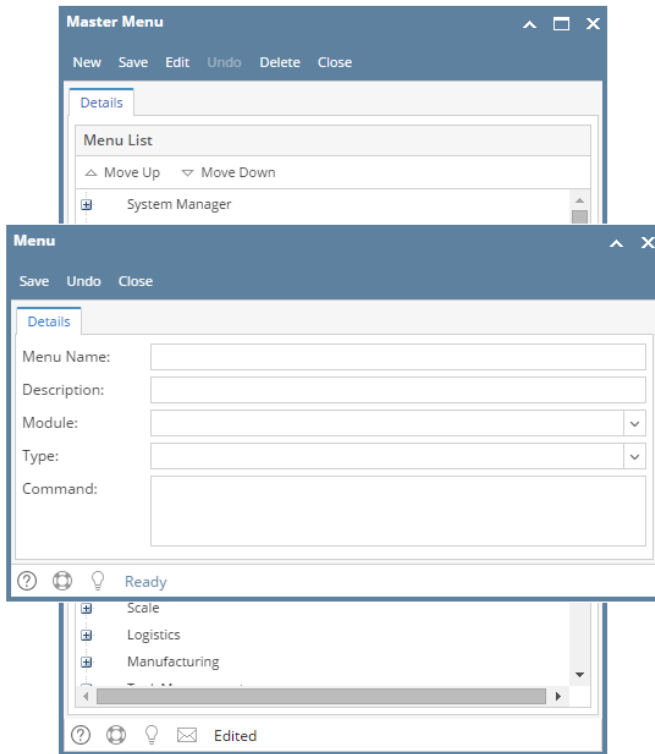
? Edited

6. Click **Save** toolbar button

Module	Destination of the menu
Type	<ol style="list-style-type: none"> Folder – this menu will allow you to organize your other menus in a single folder. Origin – when added and selected from a menu list, will open an Origin screen set in the Command field. Screen - when added and selected from a menu list, will open an i21 screen set in the Command field. Report – when added and selected from a menu list, will open the report set in the Command field.
Command	Whatever entered in this field will be opened when its menu name is clicked.

Here are the steps on how to add a Folder menu:

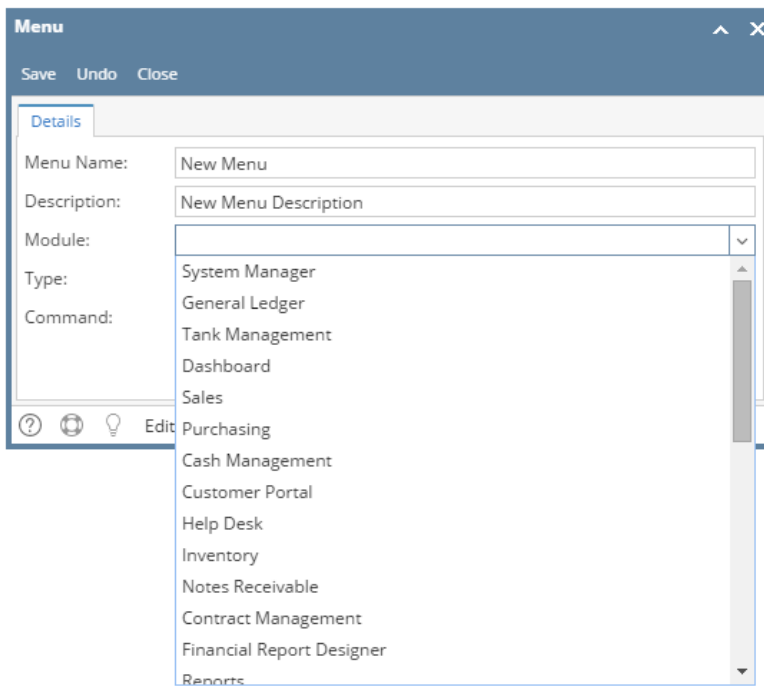
1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**
3. Click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Menu"/>
Description:	<input type="text" value="New Menu Description"/>

5. Select a **Module** from the drop down list



6. Select **Folder** as Type

Menu

Save Undo Close

Details

Menu Name: New Menu

Description: New Menu Description

Module: System Manager

Type: Folder

Command: Folder

Origin

Screen

Report

Edited

7. Click **Save** toolbar button. Menu will be added on the list.

Master Menu

New Save Edit Undo Delete Close

Details

Menu List

Move Up Move Down

- Energy Trac
- PT Customer Inquiry
- Ag Customer Inquiry
- Grain Customer Inquiry
- Print/View Reports
- Company Setup
- General Ledger
- Fixed Assets
- Accounts Payable
- Payroll
- Time Entry
- Contact Point
- Grain Accounting
- Ag Accounting
- Petrolac
- Process C-Store (xx)
- Store Accounting
- New Menu**

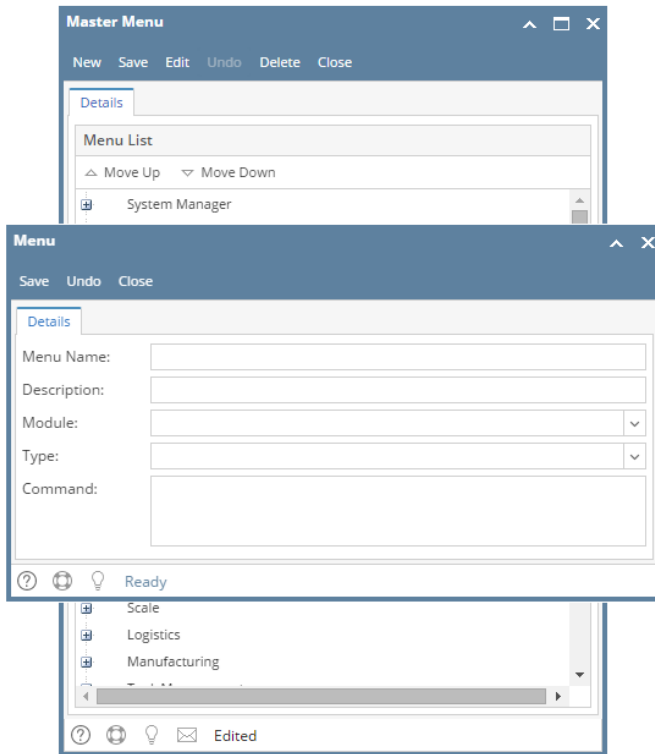
Edited

8. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Screen"/>
Description:	<input type="text" value="New Screen"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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6. Select **Screen** as **Type**

Type:	<input type="text" value="Screen"/>
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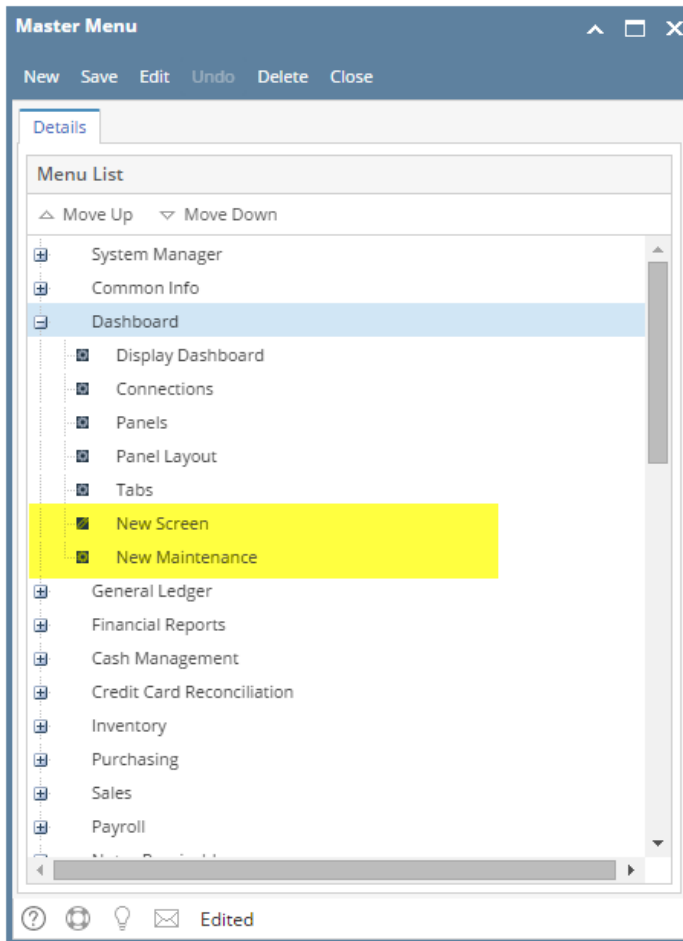
7. Select **Category**

Category:	<input type="text" value="Activity"/>
Command:	<div><div>Activity</div><div>Maintenance</div></div>

8. Enter **Command**

Command:	<input type="text" value="Dashboard.view.NewScreen"/>
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9. Click **Save** toolbar button. Menu will be added on the list.

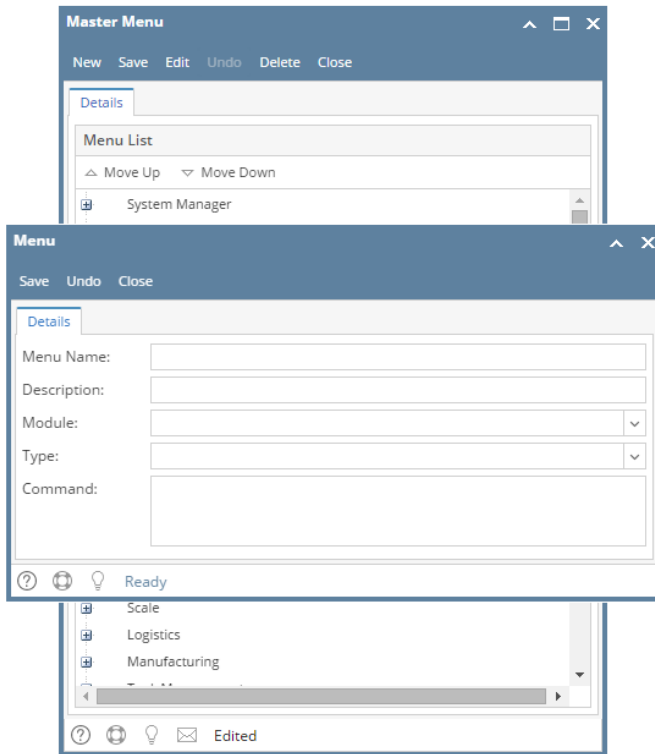


10. Click **Save** toolbar button

Here are the steps on how to add an Origin Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Origin"/>
Description:	<input type="text" value="New Origin Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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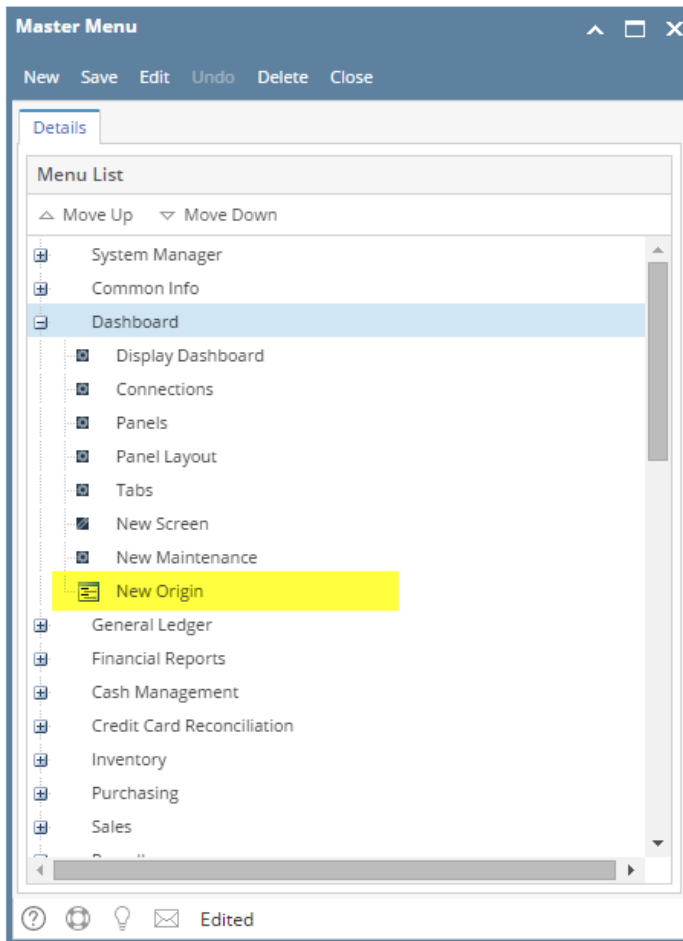
6. Select **Origin** as **Type**

Type:	<input type="text" value="Origin"/>
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7. Enter **Command**

Command:	<input type="text" value="agorde"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

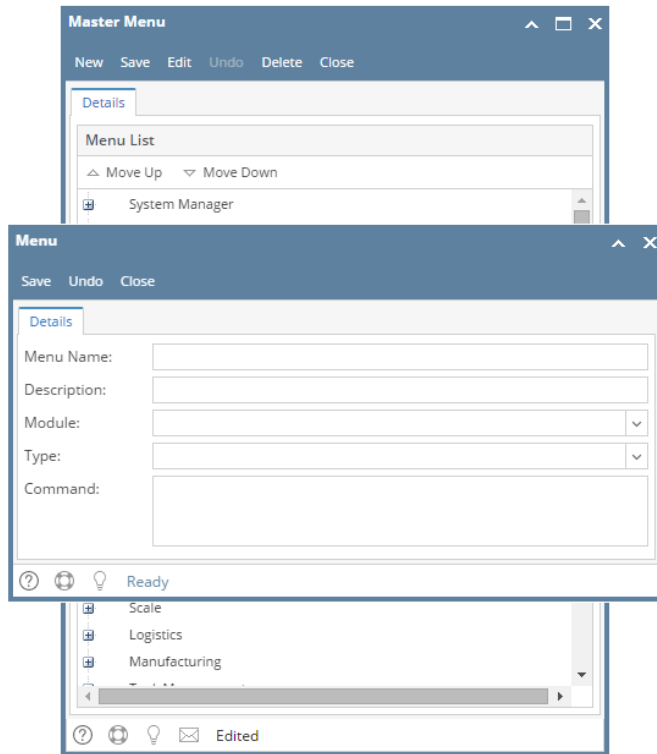


9. Click **Save** toolbar button

Here are the steps on how to add a Report Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Report"/>
Description:	<input type="text" value="New Report Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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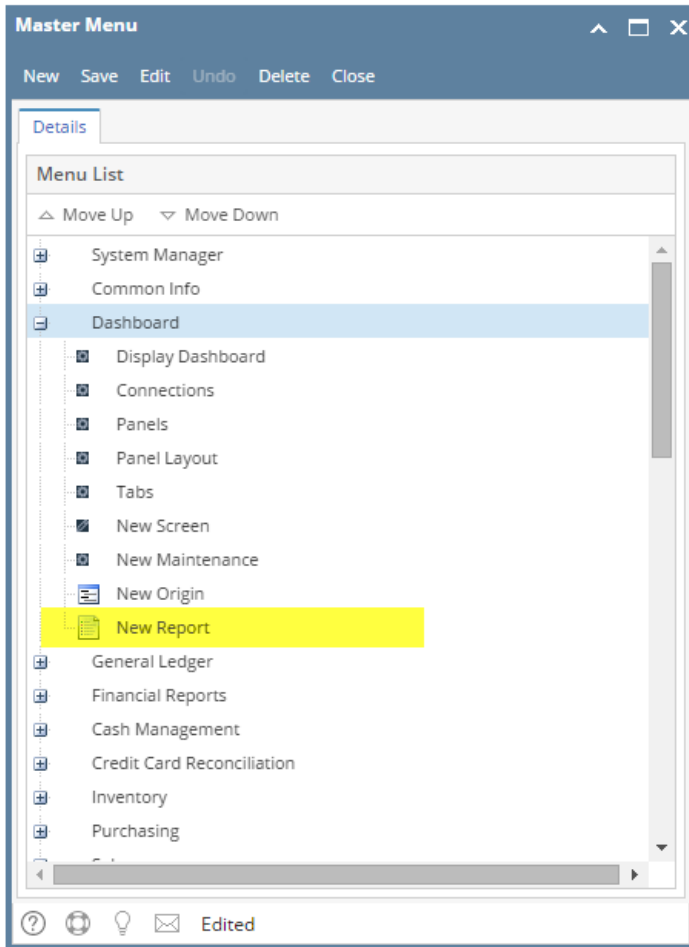
6. Select **Report** as **Type**

Type:	<input type="text" value="Report"/>
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7. Enter **Command**

Command:	<input type="text" value="New Report"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

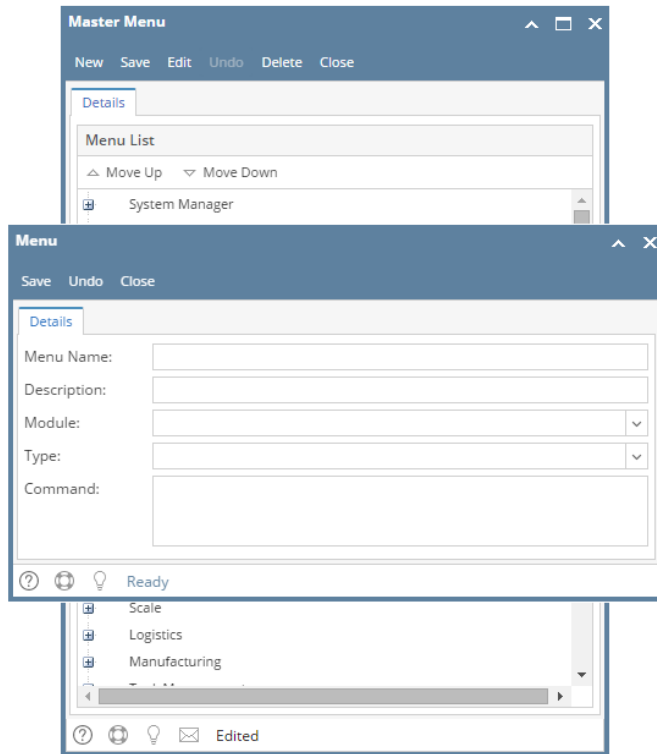


9. Click **Save** toolbar button

Here are the steps on how to add a Folder menu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Click **New** toolbar button. **Menu** screen will open.

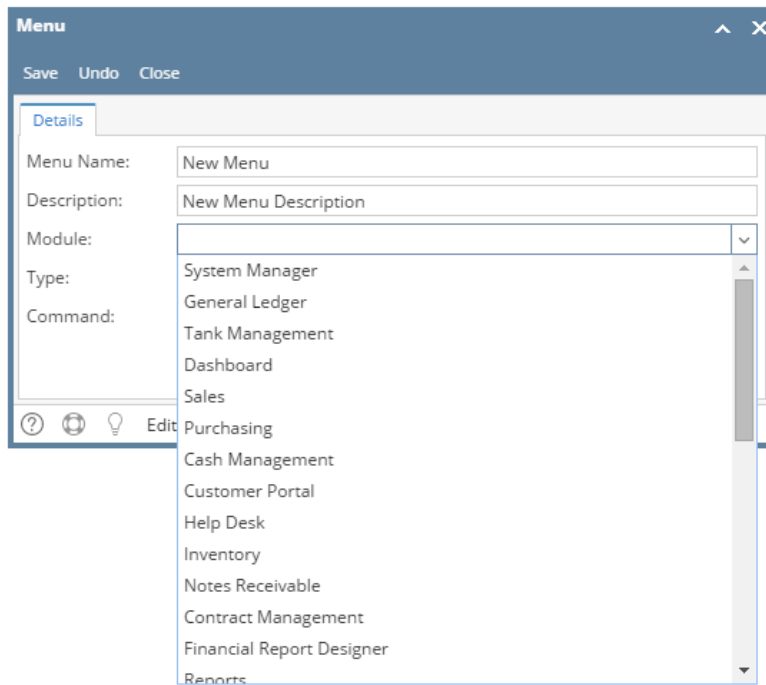


4. Enter the **Menu Name** and **Description**

Menu Name:

Description:

5. Select a **Module** from the drop down list



6. Select **Folder** as Type

Menu

Save Undo Close

Details

Menu Name: New Menu

Description: New Menu Description

Module: System Manager

Type: Folder

Command: Folder

Origin

Screen

Report

Edited

7. Click **Save** toolbar button. Menu will be added on the list.

Master Menu

New Save Edit Undo Delete Close

Details

Menu List

Move Up Move Down

Energy Trac

PT Customer Inquiry

Ag Customer Inquiry

Grain Customer Inquiry

Print/View Reports

Company Setup

General Ledger

Fixed Assets

Accounts Payable

Payroll

Time Entry

Contact Point

Grain Accounting

Ag Accounting

Petrolac

Process C-Store (xx)

Store Accounting

New Menu

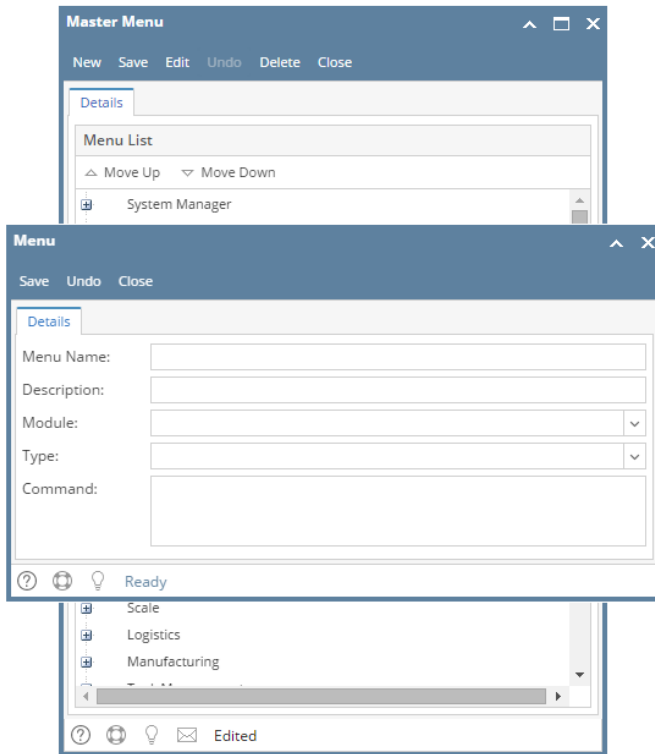
Edited

8. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Screen"/>
Description:	<input type="text" value="New Screen"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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6. Select **Screen** as **Type**

Type:	<input type="text" value="Screen"/>
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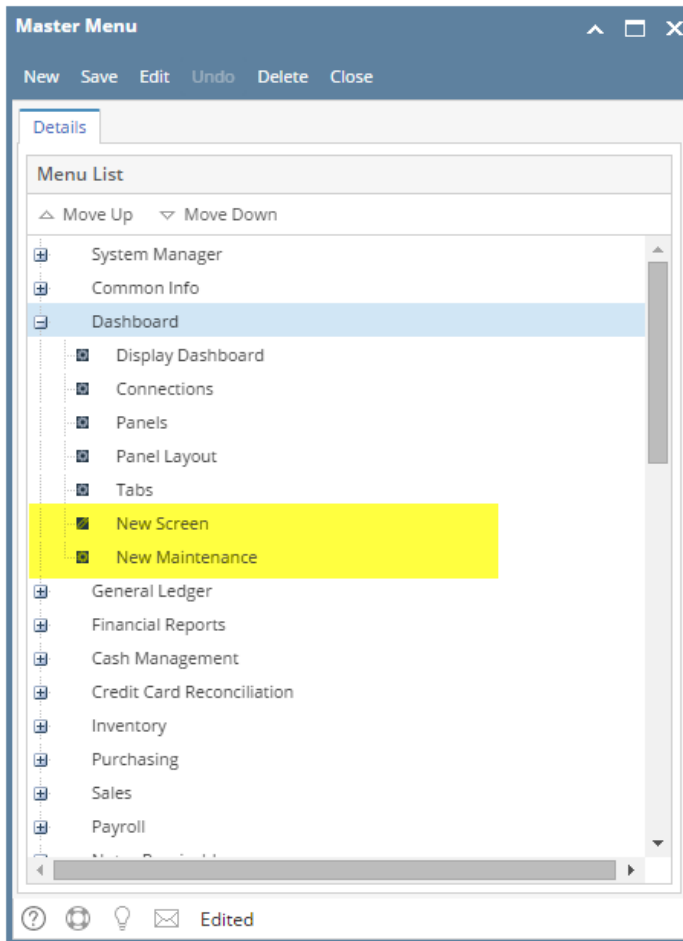
7. Select **Category**

Category:	<input type="text" value="Activity"/>
Command:	<div><div>Activity</div><div>Maintenance</div></div>

8. Enter **Command**

Command:	<input type="text" value="Dashboard.view.NewScreen"/>
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9. Click **Save** toolbar button. Menu will be added on the list.

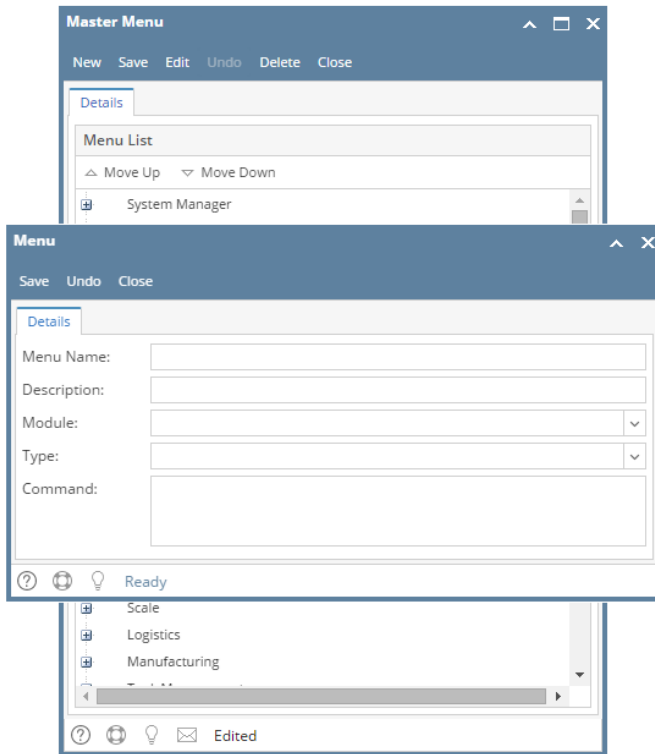


10. Click **Save** toolbar button

Here are the steps on how to add an Origin Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Origin"/>
Description:	<input type="text" value="New Origin Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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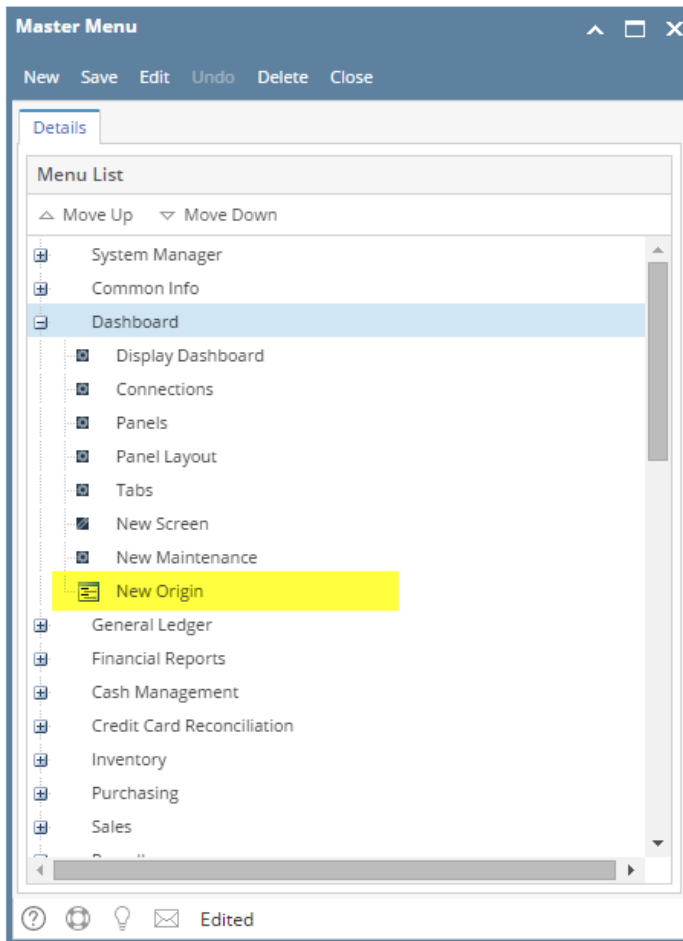
6. Select **Origin** as **Type**

Type:	<input type="text" value="Origin"/>
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7. Enter **Command**

Command:	<input type="text" value="agorde"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

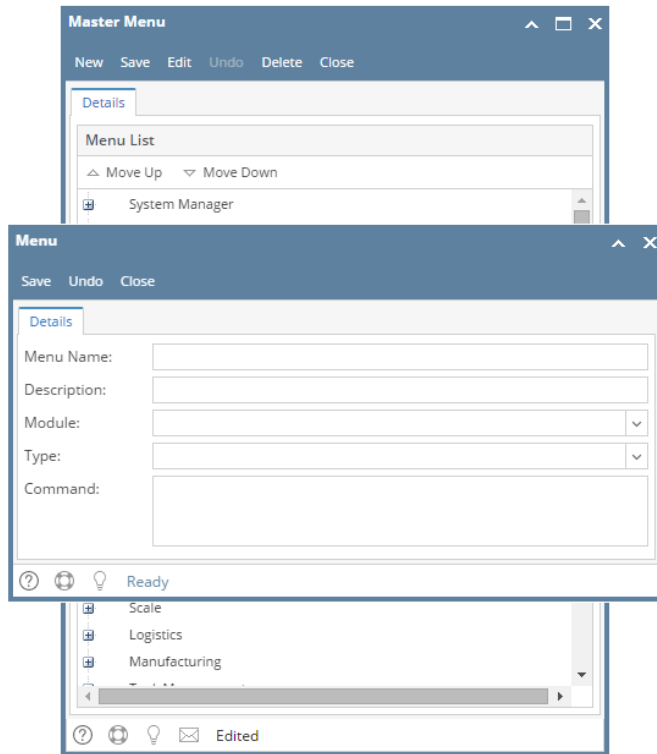


9. Click **Save** toolbar button

Here are the steps on how to add a Report Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Report"/>
Description:	<input type="text" value="New Report Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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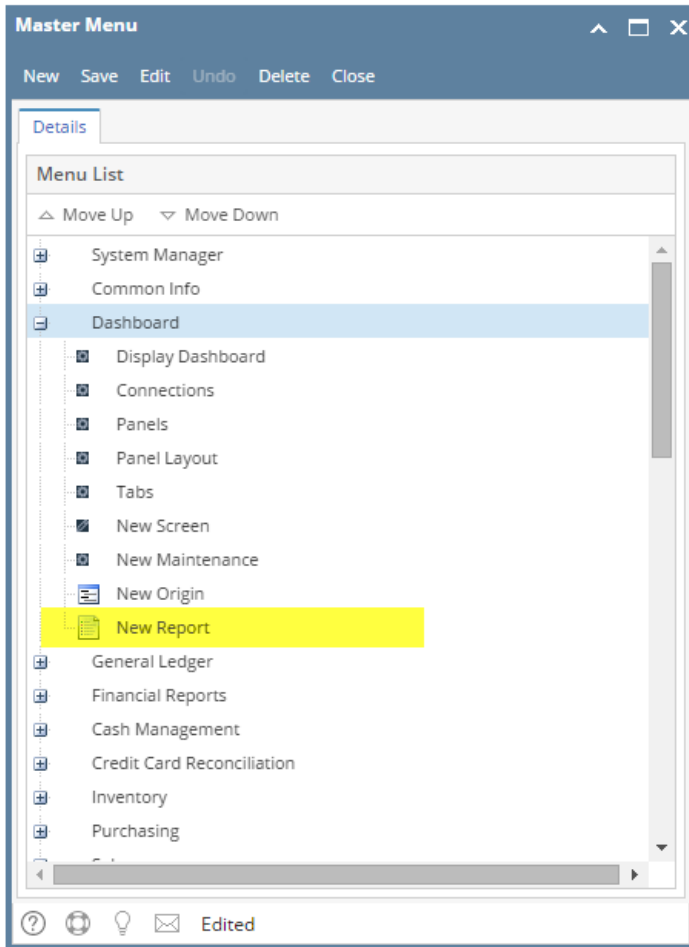
6. Select **Report** as **Type**

Type:	<input type="text" value="Report"/>
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7. Enter **Command**

Command:	<input type="text" value="New Report"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

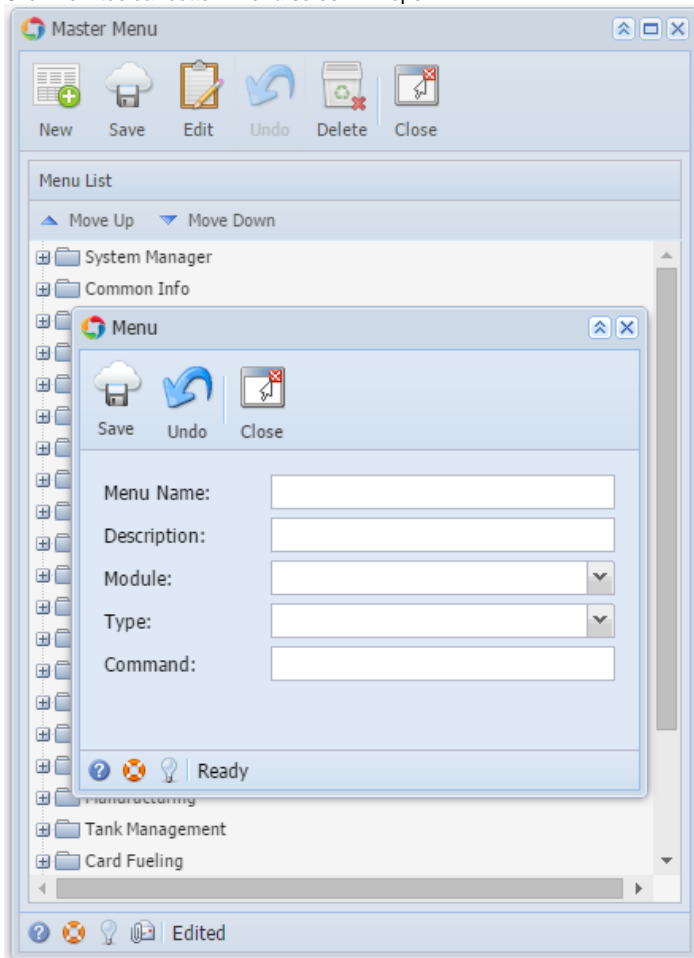


9. Click **Save** toolbar button

Here are the steps on how to add a Folder menu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

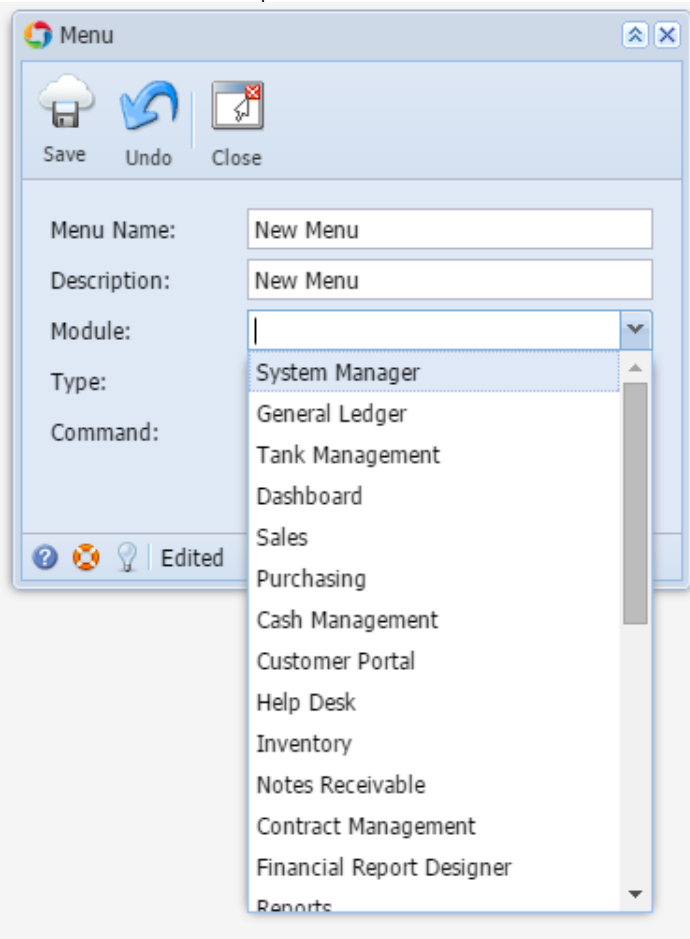
3. Click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Menu"/>
Description:	<input type="text" value="New Menu Description"/>

5. Select a **Module** from the drop down list



The 'Menu' dialog box is shown with the following fields and options:

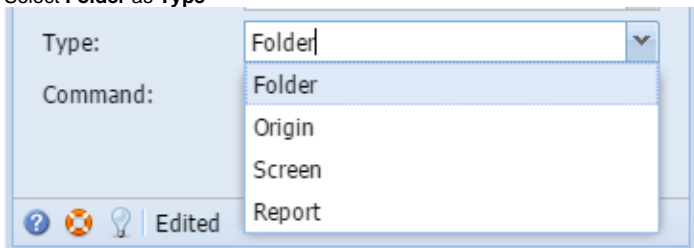
- Menu Name:** New Menu
- Description:** New Menu
- Module:** A dropdown menu is open, displaying a list of modules. The first option, 'System Manager', is highlighted.
- Type:**
- Command:**

At the top of the dialog, there are icons for 'Save' (cloud with disk), 'Undo' (blue arrow), and 'Close' (red X). At the bottom, there are icons for help (question mark), a lifebuoy, a lightbulb, and the text 'Edited'.

Module list (from top to bottom):

- System Manager
- General Ledger
- Tank Management
- Dashboard
- Sales
- Purchasing
- Cash Management
- Customer Portal
- Help Desk
- Inventory
- Notes Receivable
- Contract Management
- Financial Report Designer
- Reports

6. Select **Folder** as Type



The 'Menu' dialog box is shown with the following fields and options:

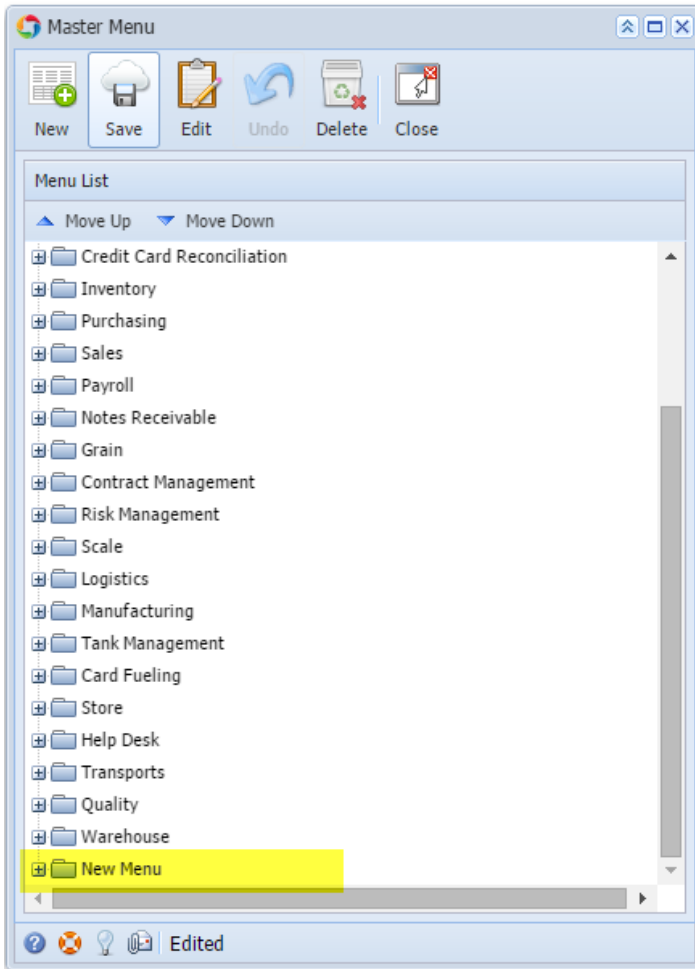
- Type:** A dropdown menu is open, displaying a list of types. The first option, 'Folder', is highlighted.
- Command:**

At the top of the dialog, there are icons for 'Save' (cloud with disk), 'Undo' (blue arrow), and 'Close' (red X). At the bottom, there are icons for help (question mark), a lifebuoy, a lightbulb, and the text 'Edited'.

Type list (from top to bottom):

- Folder
- Origin
- Screen
- Report

7. Click **Save** toolbar button. Menu will be added on the list.

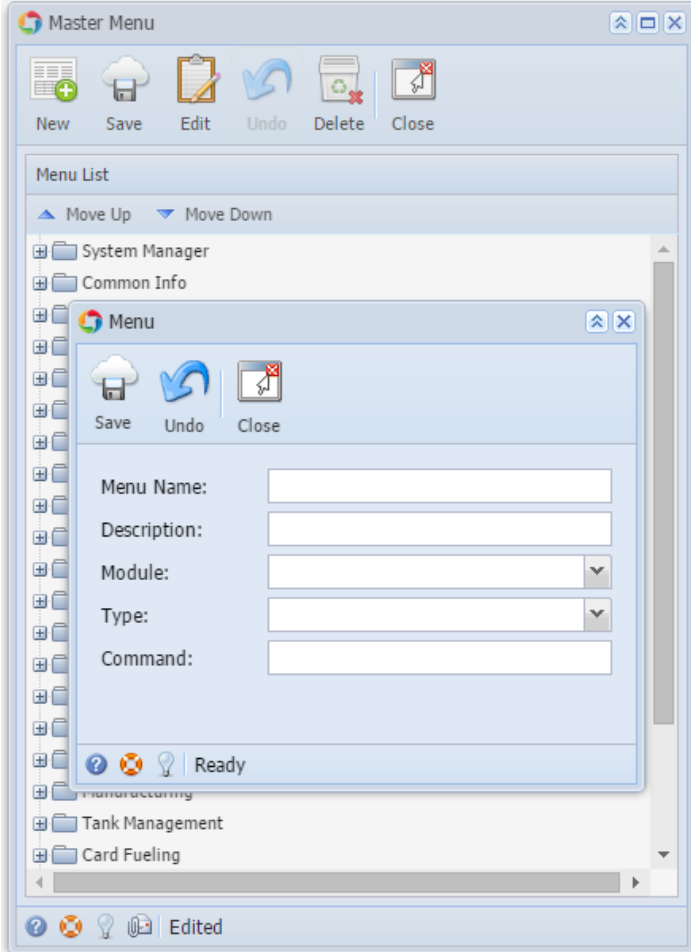


8. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Screen"/>
Description:	<input type="text" value="New Screen Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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6. Select **Screen** as Type

Type:	<input type="text" value="Screen"/>
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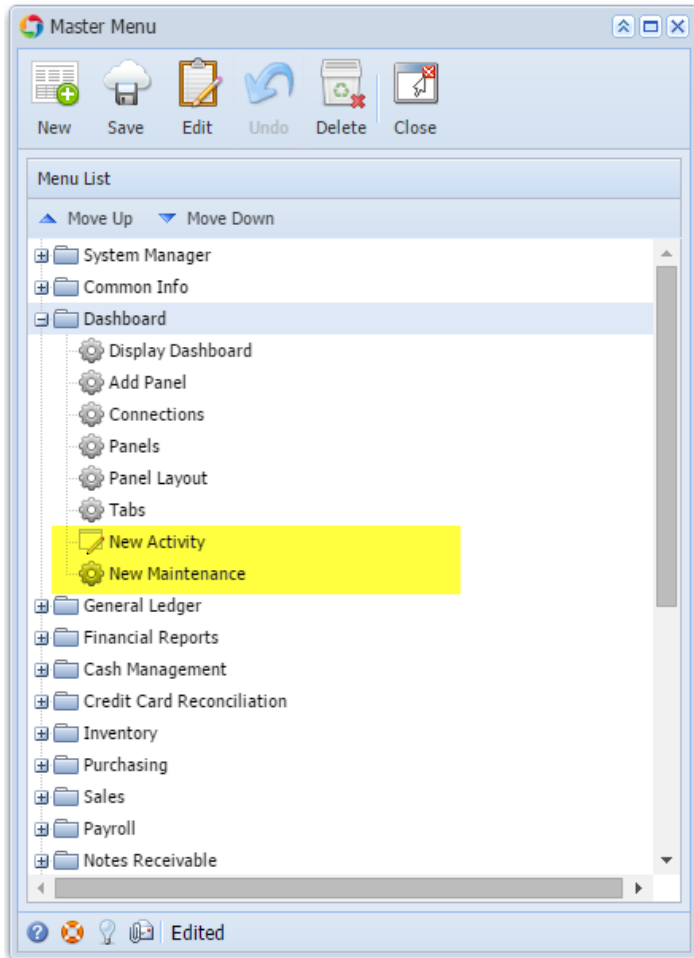
7. Select **Category**

Category:	<input type="text" value="Activity"/>
Command:	<input type="text" value="Activity"/>
	<input type="text" value="Maintenance"/>

8. Enter **Command**

Command:	<input type="text" value="Dashboard.view.NewScreen"/>
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9. Click **Save** toolbar button. Menu will be added on the list.

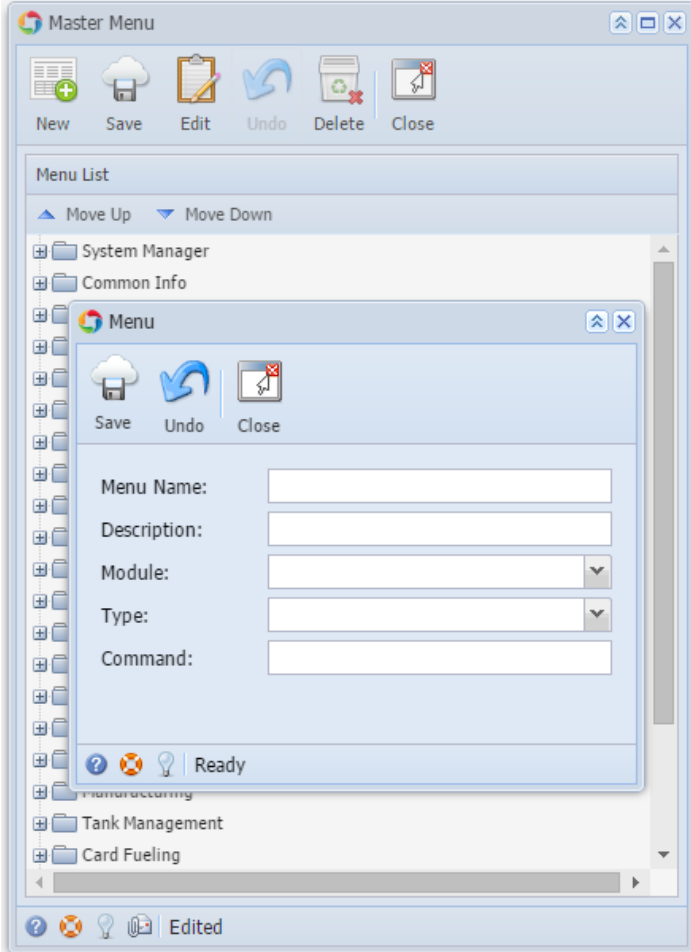


10. Click **Save** toolbar button

Here are the steps on how to add an Origin Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Origin"/>
Description:	<input type="text" value="New Origin Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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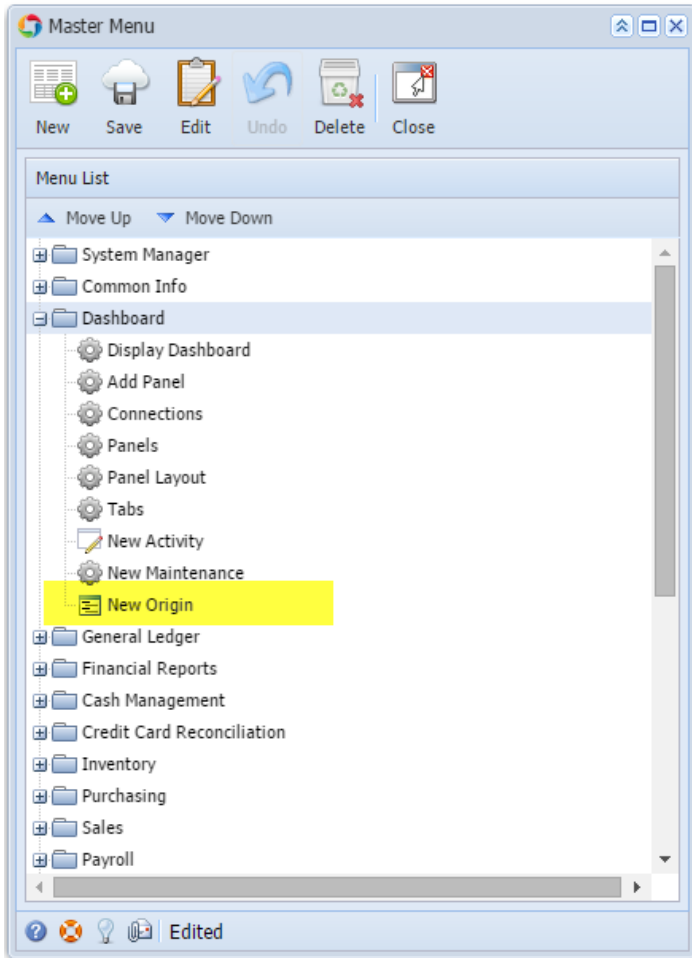
6. Select **Origin** as **Type**

Type:	<input type="text" value="Origin"/>
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7. Enter **Command**

Command:	<input type="text" value="agorde"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

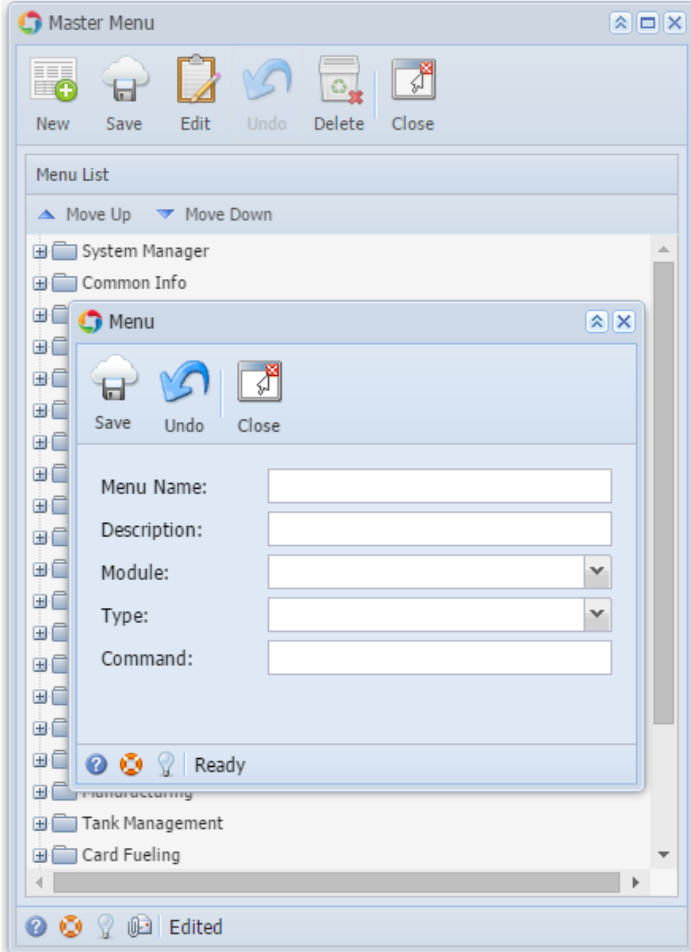


9. Click **Save** toolbar button

Here are the steps on how to add a Report Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Report"/>
Description:	<input type="text" value="New Report Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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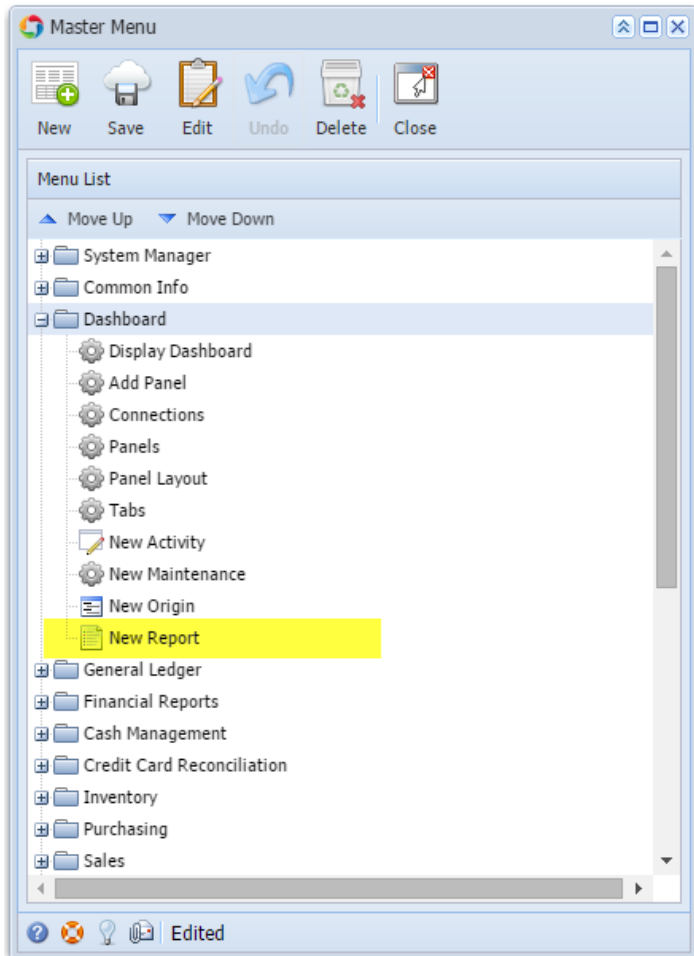
6. Select **Report** as **Type**

Type:	<input type="text" value="Report"/>
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7. Enter **Command**

Command:	<input type="text" value="New Report"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

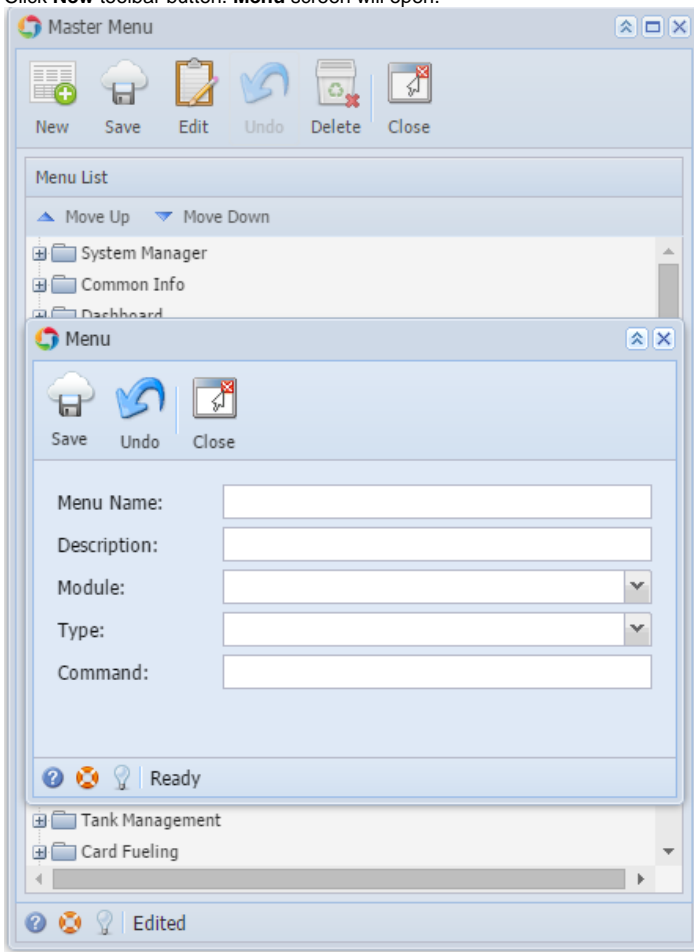


9. Click **Save** toolbar button

Here are the steps on how to add a Folder menu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Menu"/>
Description:	<input type="text" value="New Menu Description"/>

5. Select a **Module** from the drop down list

The screenshot shows a 'Menu' dialog box with the following fields and options:

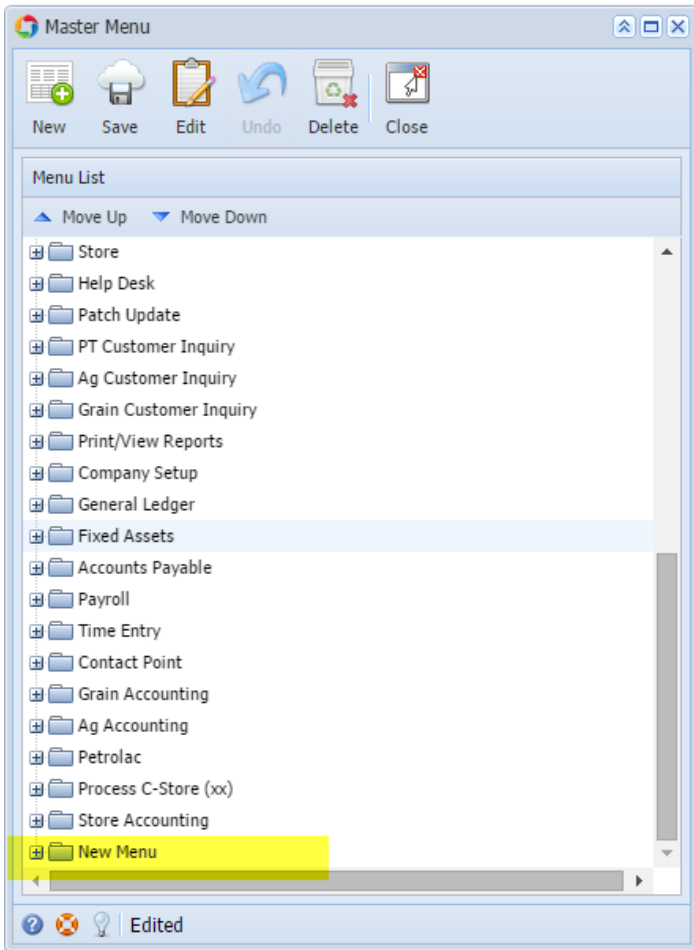
- Menu Name:** New Menu
- Description:** New Menu Description
- Module:** A dropdown menu is open, showing a list of modules: System Manager, General Ledger, Tank Management, Dashboard, Accounts Receivable, Accounts Payable, Cash Management, Customer Portal, Help Desk, Inventory, Notes Receivable, Contract Management, Financial Report Designer, and Reports.
- Type:** (Empty)
- Command:** (Empty)

At the bottom of the dialog, there is a 'Save' button, an 'Undo' button, and a 'Close' button. Below these buttons, there is a 'Logistics' folder icon, a 'Manufacturing' folder icon, a 'Tank Management' folder icon, and a 'Card Fueling' folder icon. At the bottom right, there is a 'Help' icon, a 'Lifebuoy' icon, and a 'Lightbulb' icon, followed by the text 'Edited'.

6. Select **Folder** as Type

The screenshot shows a close-up of the 'Menu' dialog box with the 'Type' dropdown menu open. The 'Type' field is set to 'Folder'. The 'Command' field is also set to 'Folder'. The dropdown menu shows the following options: Folder, Legacy, Screen, and Report.

7. Click **Save** toolbar button. Menu will be added on the list.

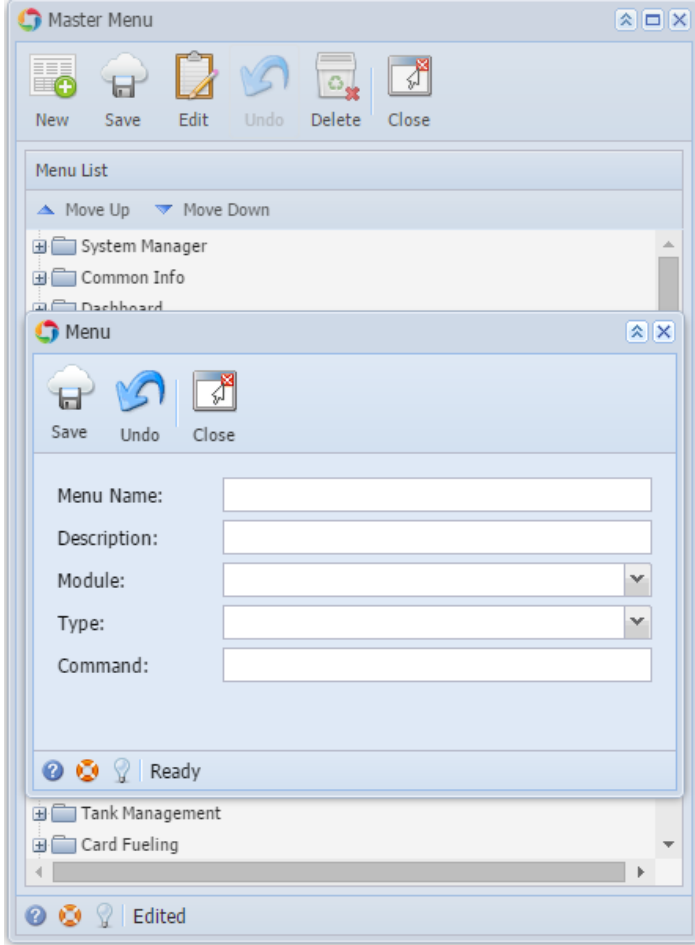


8. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Screen"/>
Description:	<input type="text" value="New Screen Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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6. Select **Screen** as **Type**

Type:	<input type="text" value="Screen"/>
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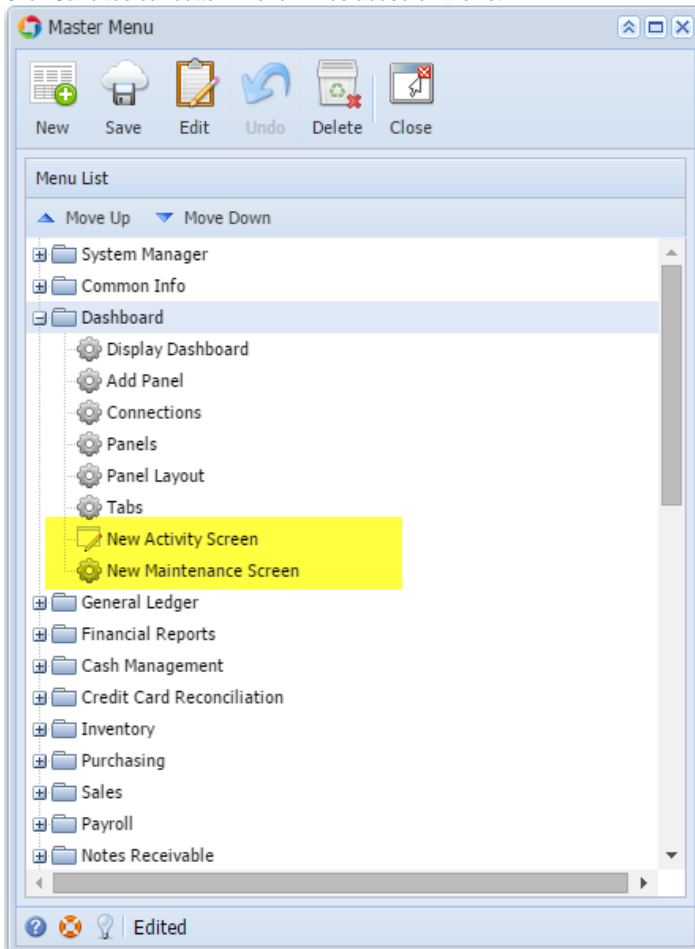
7. Select **Category**

Category:	<input type="text" value="Activity"/>
Command:	<input type="text" value="Activity"/>
	<input type="text" value="Maintenance"/>

8. Enter **Command**

Command:	<input type="text" value="Dashboard.view.NewScreen"/>
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9. Click **Save** toolbar button. Menu will be added on the list.

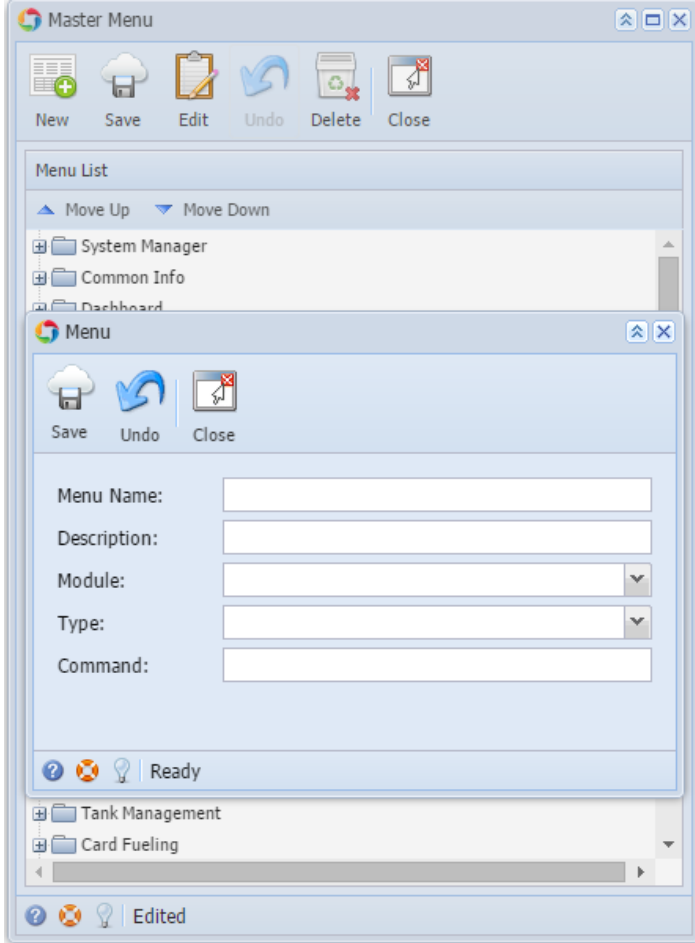


10. Click **Save** toolbar button

Here are the steps on how to add an Origin Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Origin"/>
Description:	<input type="text" value="New Origin Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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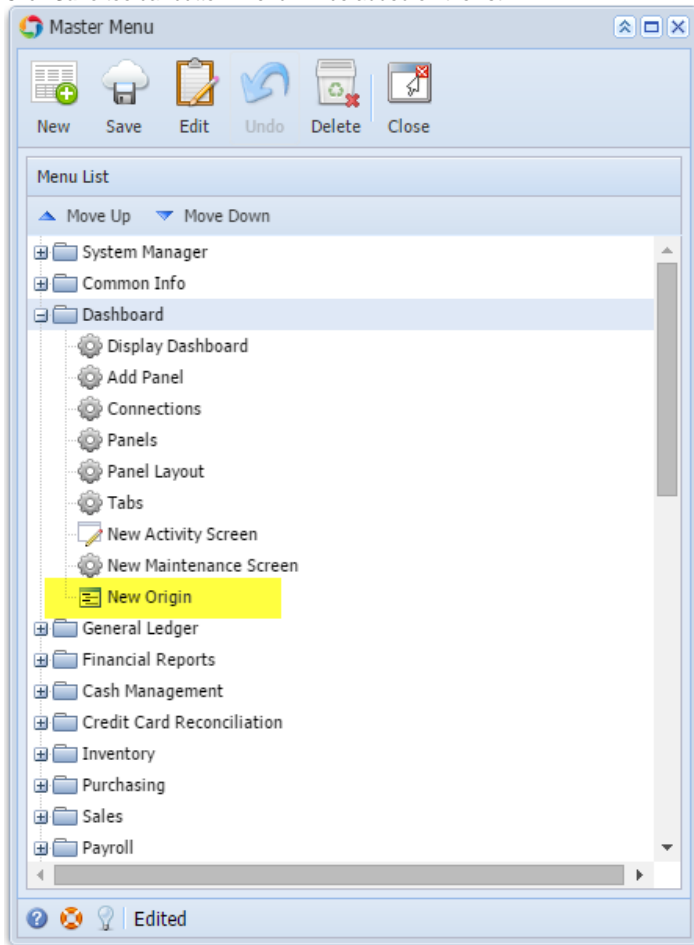
6. Select **Origin** as **Type**

Type:	<input type="text" value="Origin"/>
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7. Enter **Command**

Command:	<input type="text" value="agorde"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

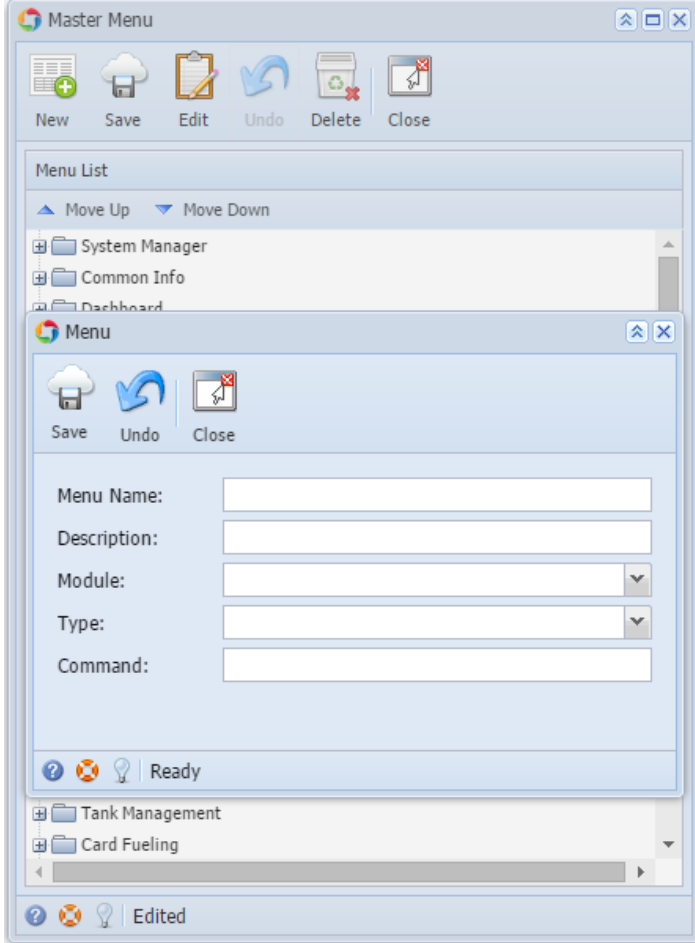


9. Click **Save** toolbar button

Here are the steps on how to add a Report Submenu:

1. Log in as **Security** user
2. On the user's menu panel go to **System Manager** folder then click **Master Menu**

3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Report"/>
Description:	<input type="text" value="New Report Description"/>

5.
6. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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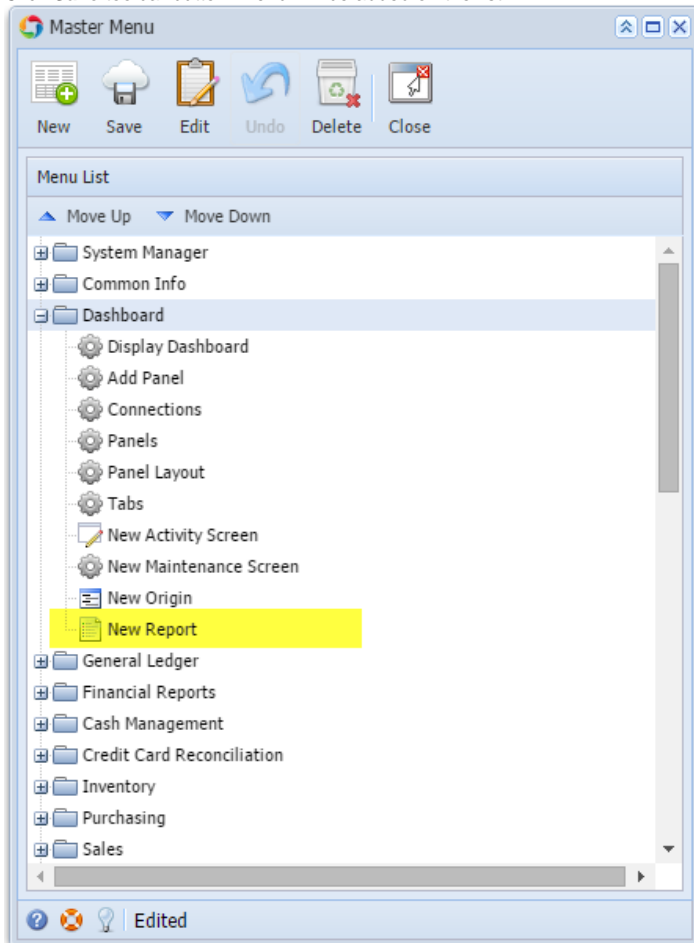
7. Select **Report** as **Type**

Type:	<input type="text" value="Report"/>
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8. Enter **Command**

Command:	<input type="text" value="New Report"/>
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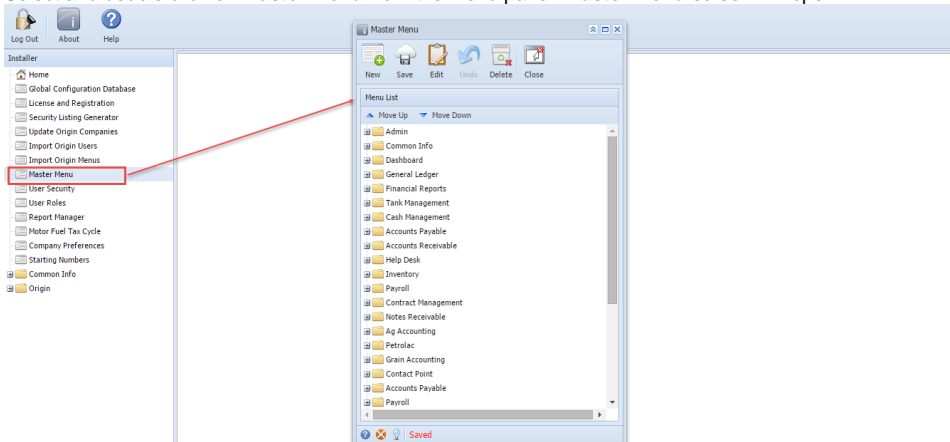
9. Click **Save** toolbar button. Menu will be added on the list.



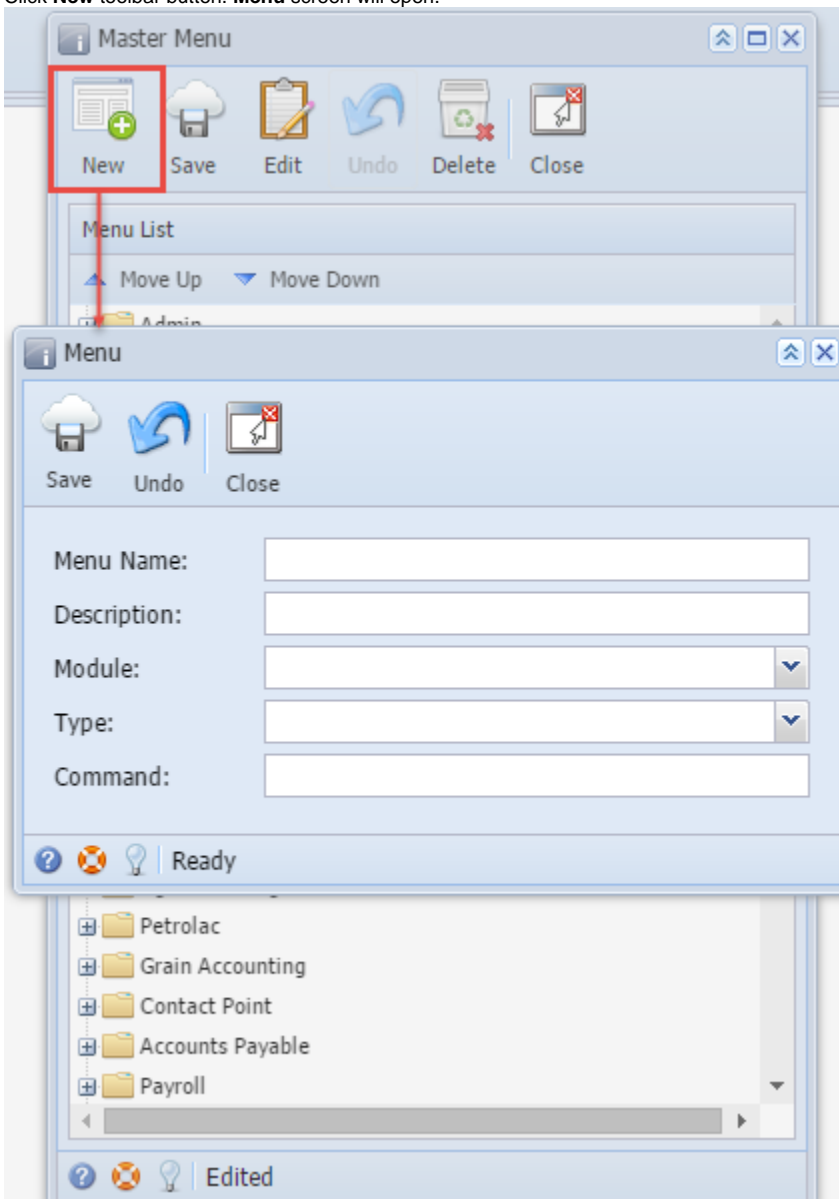
10. Click **Save** toolbar button

Here are the steps on how to add a Folder menu:

1. Log in as **Security** user
2. Select and double click on **Master Menu** from the menu panel. **Master Menu** screen will open.



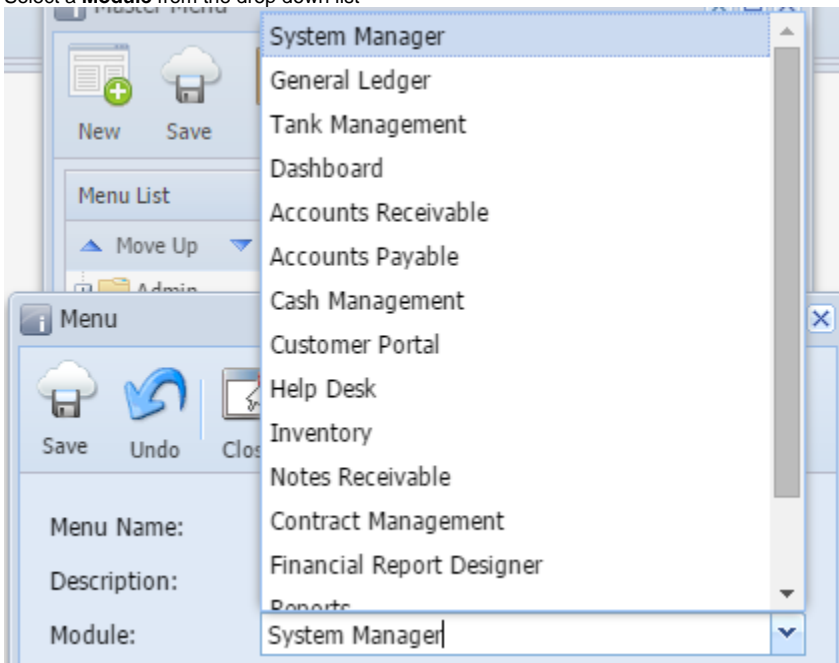
3. Click **New** toolbar button. **Menu** screen will open.



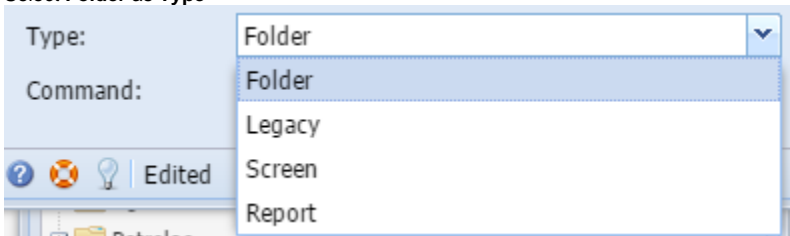
4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Menu"/>
Description:	<input type="text" value="New Menu Description"/>

5. Select a **Module** from the drop down list



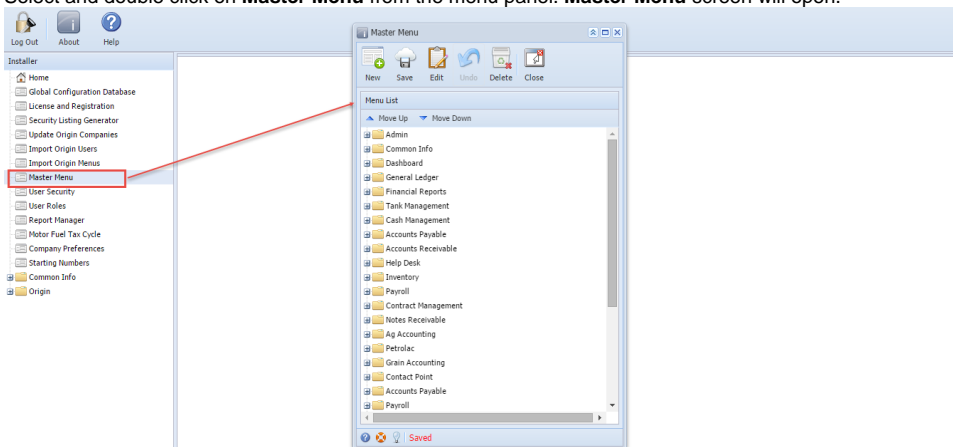
6. Select **Folder** as Type



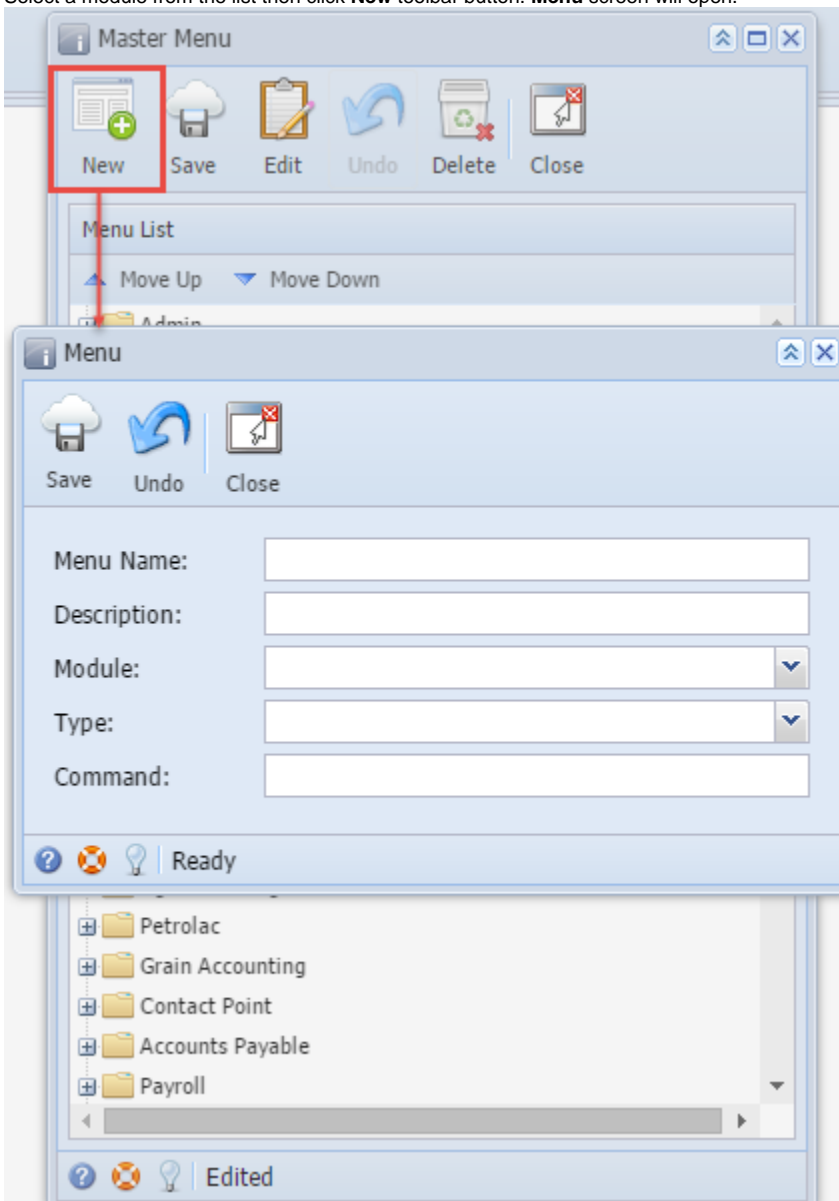
7. Click **Save** toolbar button. Menu will be added on the list.
[blocked URL](#)
8. Click **Save** toolbar button

Here are the steps on how to add a Submenu screen:

1. Log in as **Security** user
2. Select and double click on **Master Menu** from the menu panel. **Master Menu** screen will open.



3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Screen"/>
Description:	<input type="text" value="New Screen Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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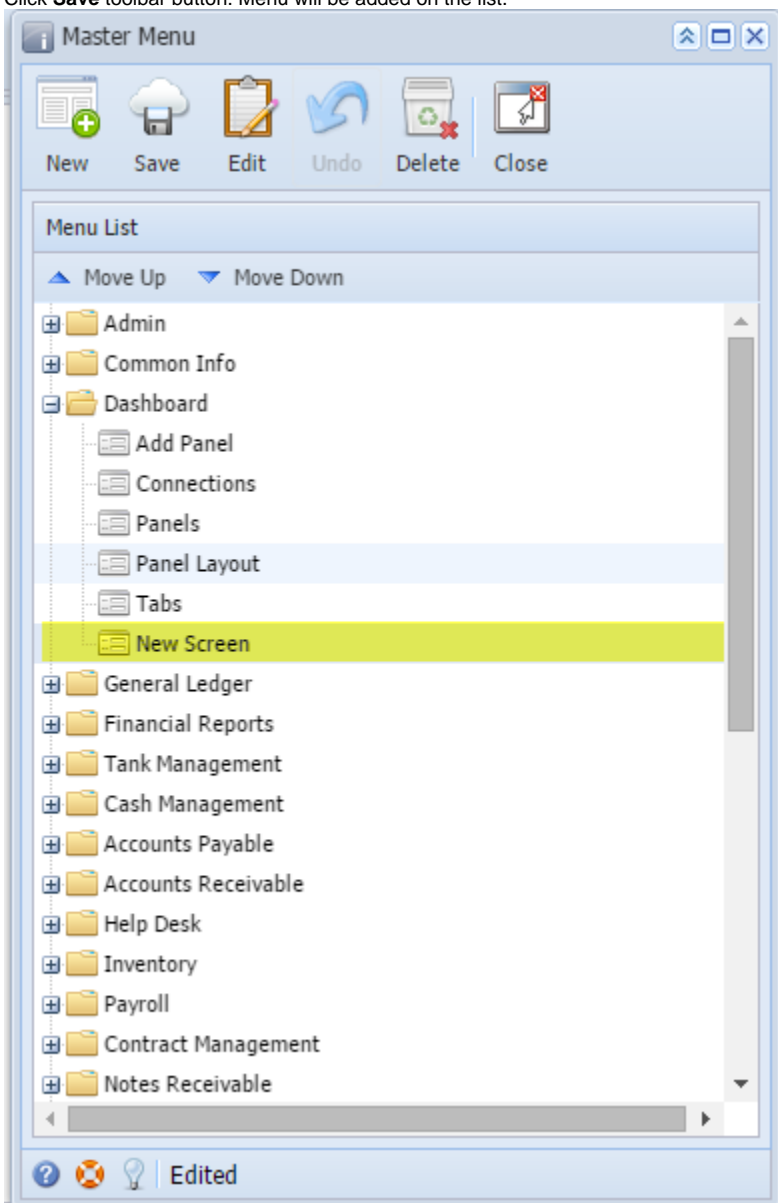
6. Select **Screen** as **Type**

Type:	<input type="text" value="Screen"/>
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7. Enter **Command**

Command:	<input type="text" value="Dashboard.view.NewScreen"/>
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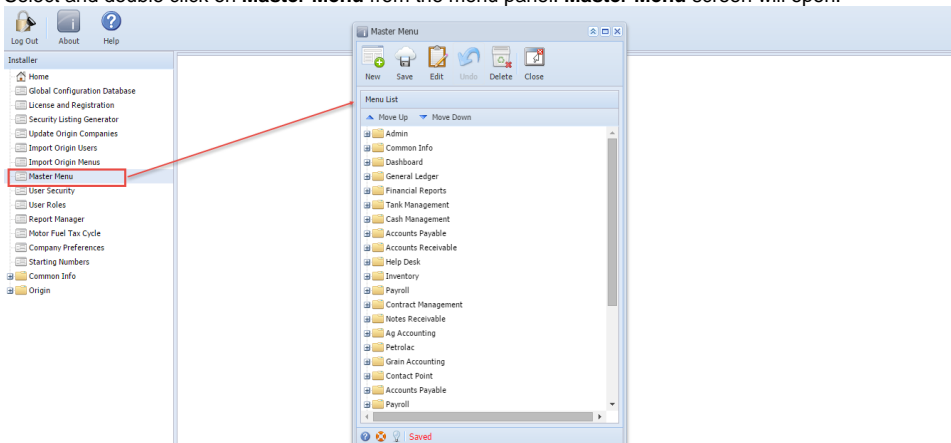
8. Click **Save** toolbar button. Menu will be added on the list.



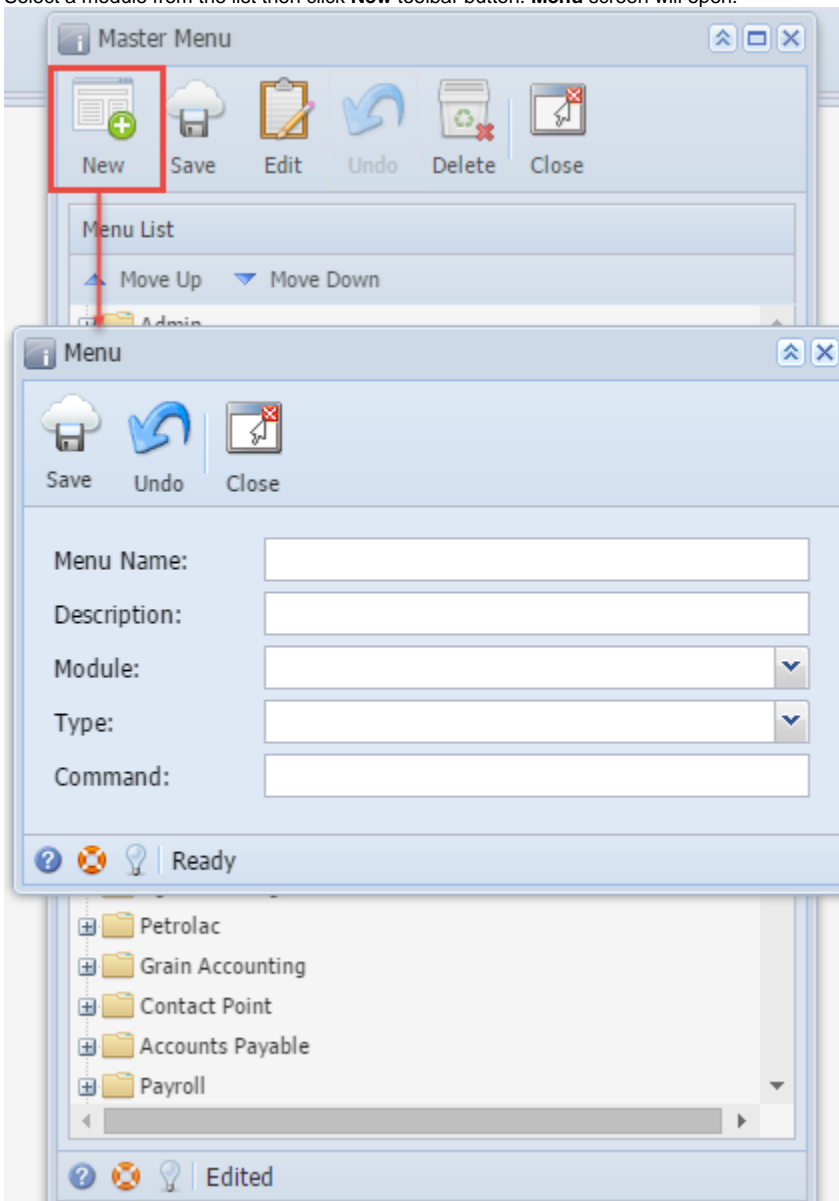
9. Click **Save** toolbar button

Here are the steps on how to add an Origin Submenu:

1. Log in as **Security** user
2. Select and double click on **Master Menu** from the menu panel. **Master Menu** screen will open.



3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Origin"/>
Description:	<input type="text" value="New Origin Description"/>

5. Select a **Module** from the drop down list

Module:	<input type="text" value="Dashboard"/>
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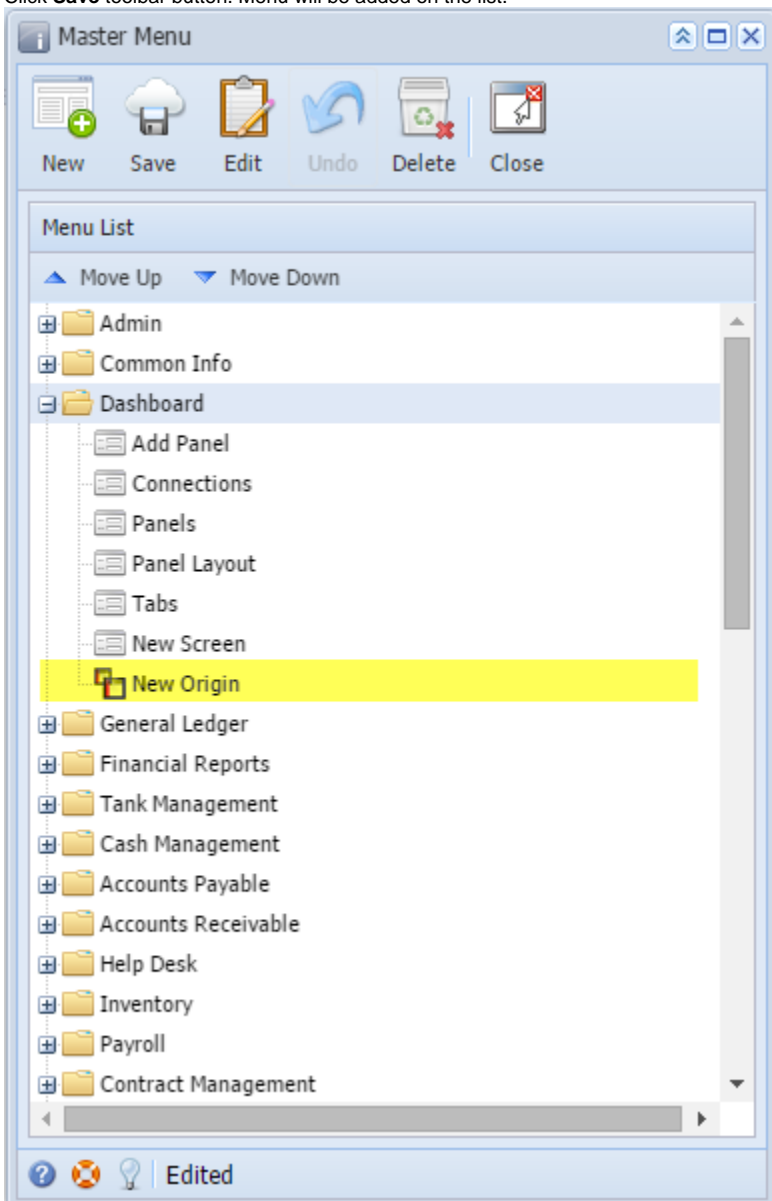
6. Select **Legacy** as **Type**

Type:	<input type="text" value="Legacy"/>
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7. Enter **Command**

Command:	<input type="text" value="agorde"/>
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8. Click **Save** toolbar button. Menu will be added on the list.

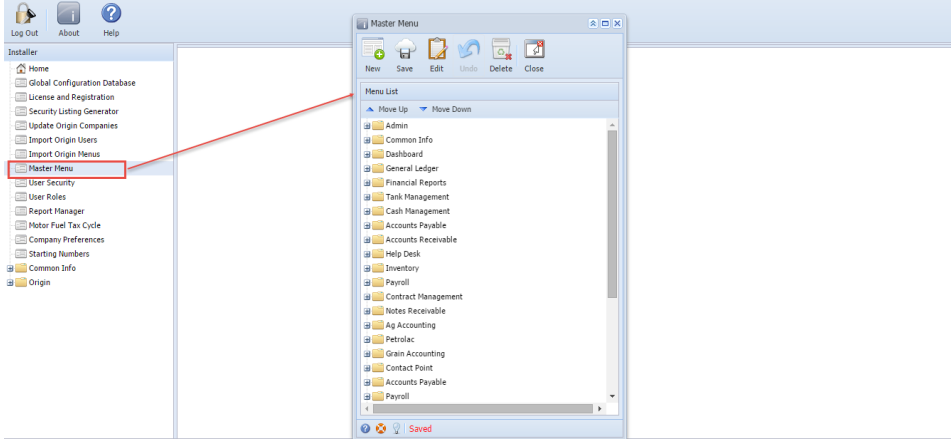


9. Click **Save** toolbar button

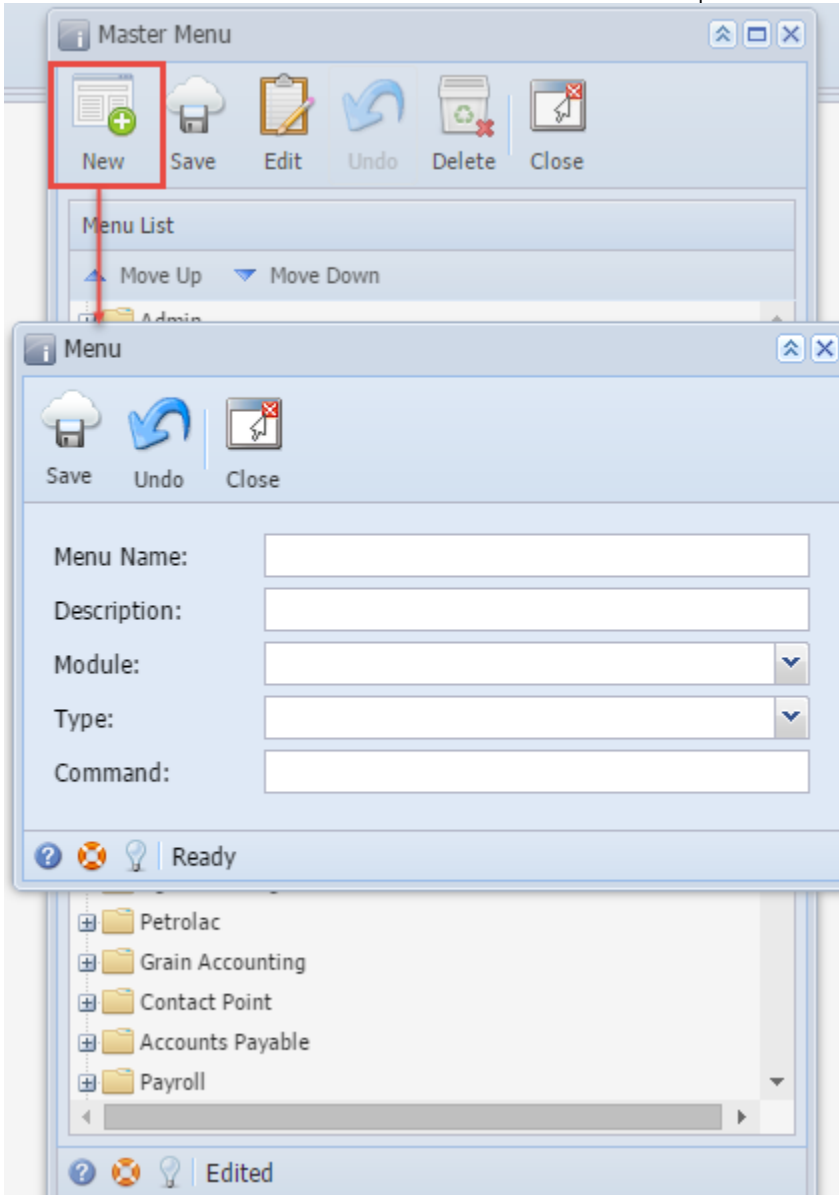
Here are the steps on how to add an Report Submenu:

1. Log in as **Security** user

2. Select and double click on **Master Menu** from the menu panel. **Master Menu** screen will open.



3. Select a module from the list then click **New** toolbar button. **Menu** screen will open.



4. Enter the **Menu Name** and **Description**

Menu Name:	<input type="text" value="New Report"/>
Description:	<input type="text" value="New Report Description"/>

5. Select a **Module** from the drop down list

Module:

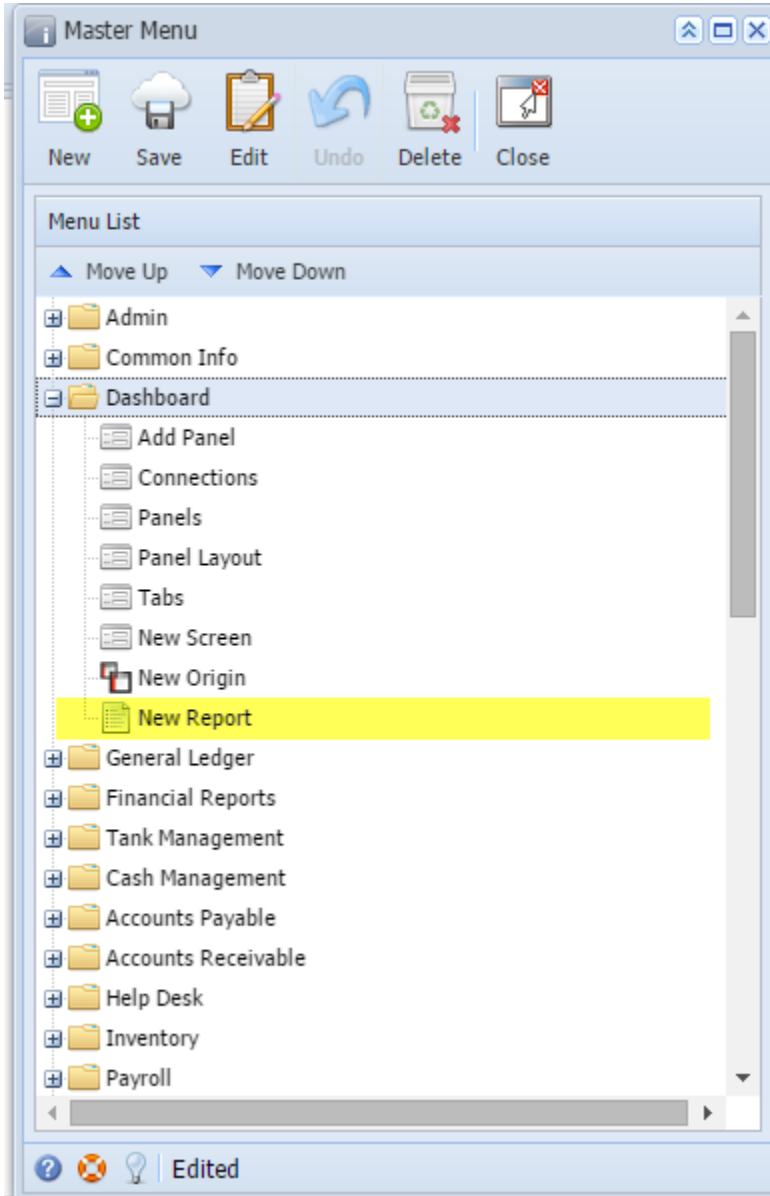
6. Select **Report** as **Type**

Type:

7. Enter **Command**

Command:

8. Click **Save** toolbar button. Menu will be added on the list.



9. Click **Save** toolbar button