

If our latest Lunch & Learn already feels like a lifetime ago, look no further. Here the main takeaways from **Hidden In Plain Sight: The Layouts and Control That Put Visibility In Your Hands**.



Layouts are the forms behind every transaction

They dictate what data gets captured on a purchase order, invoice or credit note. You can use multiple layouts for different transaction types, though fewer choices means less confusion.



Decide what fields are important, and where they live

Toggle fields on or off, mark them as mandatory or optional, and choose whether they sit at header or line level.



Use layout data to steer your workflows

Any mandatory field — including custom fields or the layout code itself — can become a workflow driver, so different transaction types can follow entirely different approval routes.



Control who sees what with settings groups

Each user belongs to just one settings group per layout, letting you default values (like tax code or currency) and restrict which codes are offered.



Copy layouts to link them to specific suppliers

Duplicate an existing layout and tie it to a supplier like Amazon, letting you capture or preset different data for that supplier's transactions alone.



Give every layout its own PO template

Purchase order layouts can each point to a different PDF template, controlling colours, logo, net/VAT display and terms, so the paperwork matches the process behind it.



Strip it back or lock it down

Some customers simplify requisitions to just supplier, item and cost for speed, leaving coding to the AP operator later. Others capture everything upfront so matching and posting run automatically.