

# General Preferences

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## General Tab

The General Section allows you to modify the following:

- How many places you would like Decimal Points to display (you have the option of setting it for Quantity, Cost, Price, and Percentage)
- If you would like to enable Foreign Currency.
- If you would like to include the current month in "Trailing Twelve Months" filter.
- Ignore security settings: Check to prevent a ' to be added to a cell when exporting lists or reports
- Display Floor/Suite as a separate line - by default it shows on the same line as the street.
- Hide inactive records when performing searches
- Disable the unapproved watermark when creating from PDFs
- Show Currency symbol on print outs
- Enable Form Templates with Doc Status control (Also allows Default controls)
- Turn off import email notifications
- Enable Web Hook

The screenshot shows the 'Company Preferences' window with the 'General' tab selected. On the left is a sidebar with a list of sections: General, Activities, Doc #s, Items, Inventory, Sales, Shipping, Payments, Purchasing, Receiving, Production, Lot / Serial #s, Repair Orders, Mobile, and Mail and Calendar Integration. The 'General' section is highlighted with a red box. The main content area is divided into two tabs: 'General' and 'Advanced'. Under the 'General' tab, there is a 'Decimal Points' section with input fields for Quantity (0), Cost (2), Price (2), Percentage (3), Purchase Cost (2), Purchase Quantity (2), Sales Quantity (-1), and Weight/Volume (2). Below this is a list of checkboxes: 'Enable Foreign Currency' (unchecked), 'Include current month in 'Trailing Twelve Months' filter.' (unchecked), 'Ignore security escape characters when exporting lists and reports to csv.' (checked), 'Display Floor/Suite as a separate line.' (checked), 'Hide inactive records when performing searches' (unchecked), 'Disable unapproved watermark when creating from PDFs.' (unchecked), 'Show currency symbol on print outs' (unchecked), 'Enable Form Templates with Doc Status control.' (checked), 'Turn off import email notifications' (unchecked), and 'Enable Web Hook' (unchecked).

## Advanced Tab

- Turn off autocomplete hover selection
  - Checking this will disable Order Time from autocompleting your search field when hovering over a list option
- Clear custom field data when duplicating a document

- When checked, Order Time will clear the contents of all custom fields when cloning documents
- Period Closed Date
  - Entering a date here will mean that Order Time will prevent edits and deletions for transactions that posted before that date

Admin > Company Preferences

### Company Preferences

Section	General	Advanced
General		
Activities		
Doc #s		
Items		
Inventory		
Sales		
Shipping		
Payments		
Purchasing		
Receiving		
Production		
Lot / Serial #s		
Repair Orders		
Mobile		
Mail and Calendar Integration		

#### Advanced

☐ Turn off autocomplete hover selection

☐ Clear custom field data when duplicating a document

Order Time will prevent edits and deletions for 'Posting' transactions that are on or before the 'Period Closed Date'

Period Closed Date

Click **Save** when done.