

# Profile Lists - Overview

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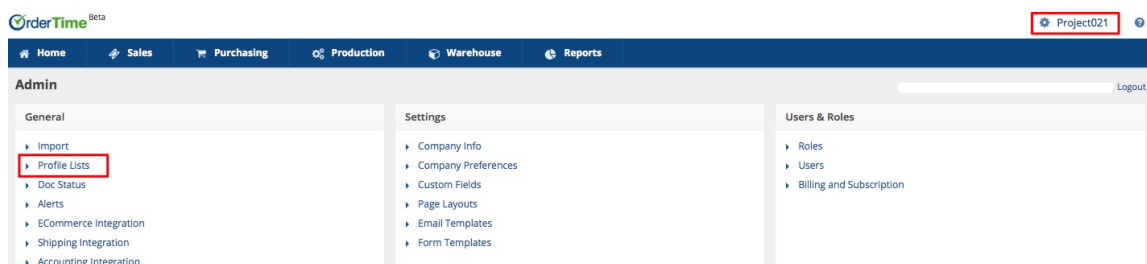
## Overview

Profile Lists are complementary lists used to transactions and other record types for example *Sales Rep* is used in both customers and sales orders.

Once you locate the section that needs customization, click it and appropriate screen will appear.

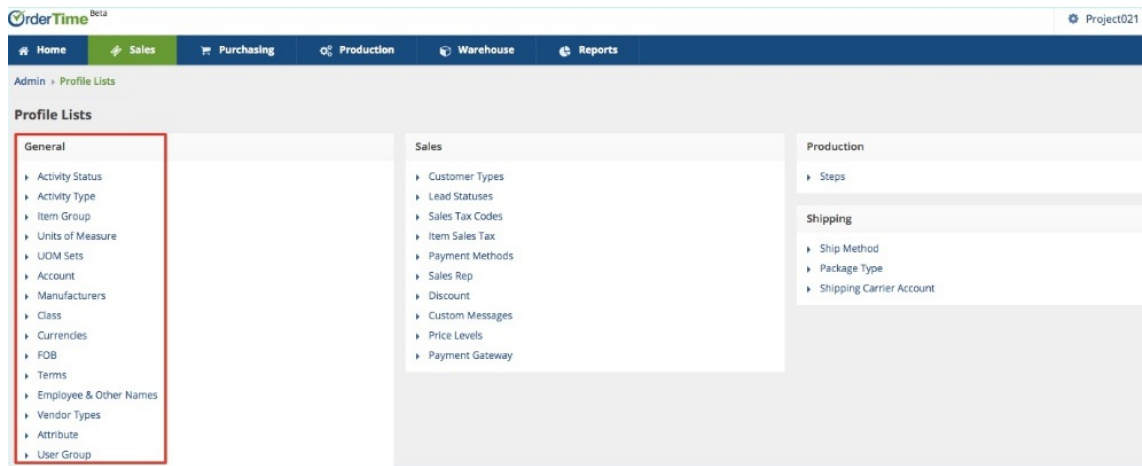
## Profile List Menu

To Access the Profile List menu, click on Gear icon to access the *ADMIN* screen, then select *Profile Lists*, located under the *General* section.



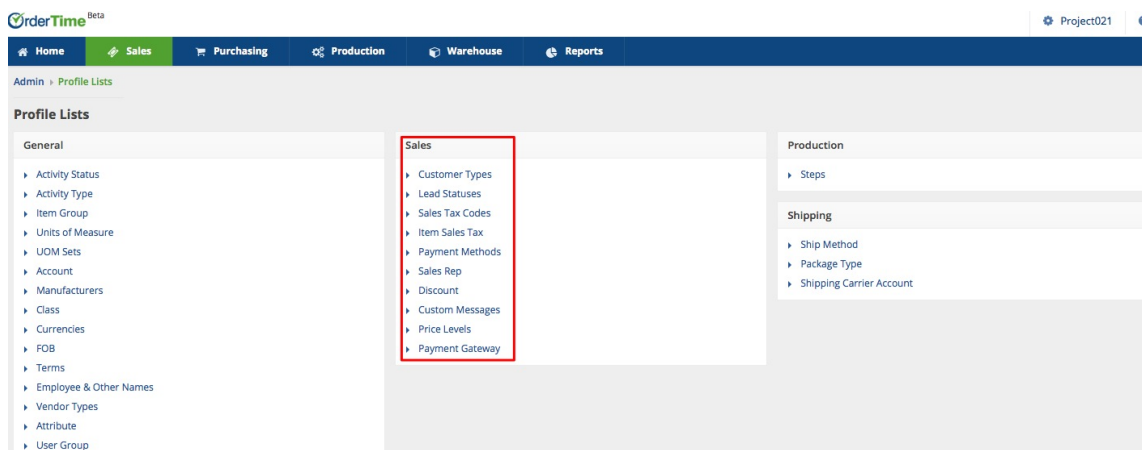
## General

Under "General" profile listing, you are able to customize a variety of settings that will drive Active and Inactive records. Each section will drive a specific function in OrderTime.



## Sales

Under "Sales" profile listing, you are able to customize a variety of settings that will drive your sales activities and records. Each listing provides you the ability to customize a specific sales transaction.



## Production

Under "Production" profile listing, you are able to customize production steps and locations.

## Shipping

Under "Shipping" profile listing, you are able to customize shipping methods and prices.

Profile Lists

General

- › Activity Status
- › Activity Type
- › Item Group
- › Units of Measure
- › UOM Sets
- › Account
- › Manufacturers
- › Class
- › Currencies
- › FOB
- › Terms
- › Employee & Other Names
- › Vendor Types
- › Attribute
- › User Group

Sales

- › Customer Types
- › Lead Statuses
- › Sales Tax Codes
- › Item Sales Tax
- › Payment Methods
- › Sales Rep
- › Discount
- › Custom Messages
- › Price Levels
- › Payment Gateway

Production

- › Steps

Shipping

- › Ship Method
- › Package Type
- › Shipping Carrier Account