General Profile Lists

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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.

Order Time Beta	Project021	
🐇 Home 🛷 Sales 🎽 Purchasing	ର୍ଟ୍ଣ Production 📦 Warehouse 🌰 Reports	
Admin		Logor
General	Settings	Users & Roles
Import Profile Lists Doc Status Alerts Ecommerce Integration Shipping Integration Accounting Integration	 Company Info Company Preferences Custom Fields Page Layouts Email Templates Form Templates 	 Roles Users Billing and Subscription

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.

Home 🧳 Sales	🛒 Purchasing 🛛 🖓 Produ	uction 📦 Warehouse	🖨 Reports		
lmin → Profile Lists					
rofile Lists					
General		Sales		Production	
Activity Status		Customer Types		 Steps 	
 Activity Type 		Lead Statuses			
Item Group		 Sales Tax Codes 		Shipping	
 Units of Measure 		Item Sales Tax		and the second sec	
UOM Sets		 Payment Methods 		 Ship Method 	
Account		 Sales Rep 		Package Type	
 Manufacturers 		 Discount 		 Shipping Carrier Account 	
Class		 Custom Messages 			
Currencies		 Price Levels 			
FOB		 Payment Gateway 			
Terms					
Employee & Other Names					
Vendor Types					
Attribute					

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.

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dmin ⊧ Profile							
Profile Lists	5						
General				Sales		Production	
Activity Star	tus			Customer Types		► Steps	
 Activity Typ 	e			Lead Statuses			
Item Group	5			 Sales Tax Codes 		Shipping	
 Units of Me 	asure			Item Sales Tax			
 UOM Sets 				 Payment Methods 		Ship Method	
 Account 				 Sales Rep 		Package Type	
 Manufactu 	rers			 Discount 		 Shipping Carrier Account 	
 Class 				 Custom Messages 			
 Currencies 				 Price Levels 			
FOB				 Payment Gateway 			
 Terms 							
 Employee 8 	& Other Names						
 Vendor Typ 	oes						
 Attribute 							
 User Group 	0						

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.

🖀 Home	🏘 Sales	📜 Purchasing	og Production	🗑 Warehouse	🚓 Reports		
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Profile Lists	5						
General				Sales		Production	
 Activity Stat Activity Typ Item Group Units of Me UOM Sets Account Manufactur Class Currencies FOB Terms 	ie b basure rers			Customer Types Lead Statuses Sales Tax Codes Item Sales Tax Payment Methods Sales Rep Discount Custom Messages Price Levels Payment Gateway		Steps Shipping Ship Method Package Type Shipping Carrier Account	