

# 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, Rentals, Mobile, and Mail and Calendar Integration. The 'General' section is highlighted. The main area is divided into 'General' and 'Advanced' sub-tabs, with 'General' currently active. Under 'General', there is a 'Decimal Points' section with dropdown menus for Quantity (2), Cost (2), Price (2), Percentage (1), Purchase Cost (2), Purchase Quantity (2), Sales Quantity (2), and Weight/Volume (2). Below this are several checkboxes: 'Enable Foreign Currency' (checked), 'Include current month in Trailing Twelve Months filter' (checked), 'Ignore security escape characters when exporting lists and reports to csv' (checked), 'Display Floor/Suite as a separate line' (unchecked), 'Hide inactive records when performing searches' (checked), 'Disable unapproved watermark when creating from PDFs' (unchecked), 'Show currency symbol on print outs' (checked), 'Enable Form Templates with Doc Status control' (checked), 'Turn off import email notifications' (unchecked), and 'Enable Web Hook' (unchecked). 'Save' and 'Reset' buttons are in the top right corner.

## 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
- Do not allow existing custom list views to be overridden
- Allow editing custom fields from a transaction's details page, even when the transaction is closed.
  - Allow editing custom fields from a full list in batch action
- Show Account numbers while selecting an Account

- Show location address on a form template instead of the company addresses
- Show only Employees for name on time entries
- Enable Doc Status Role Restrictions
- Hear a beep sound after successfully scanning a line item
- Period Closed Date
  - Entering a date here will mean that Order Time will prevent edits and deletions for transactions that posted before that date
- Show form templates in letter size (8.5x11)
  - Forces a default page size for Form Templates when they are converted to PDF
- Mark Memo and Instructions tab when they have data.
  - Tabs will highlight red to indicate data has been added
- Enable Report Calculated Fields
  - Allows you to use fields that exist on the report in a calculation within the report itself
- Enable Reports from the Detail Page
  - You will be able to access reports with a matching type to the Entity or Transaction you are on filtered for that Entity or Transaction
- Order Time will prevent edits and deletions for 'Posting' transactions that are on or before the 'Period Closed Date'

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Click **Save** when done.