

Company Preferences - Items

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Items

Under Item preference, you will be able to dictate various aspects of item usage.

The Items preference contains several options of how the Item will be used within your organization. Special attention should be given to each of these options for they have major consequences for your items.

The Items Section allows you to modify the following:

When searching for items on a document

The screenshot shows the OrderTime interface. At the top, there is a navigation bar with 'Home', 'Sales', 'Purchasing', 'Production', 'Rentals', 'Repairs', 'Warehouse', and 'Reports'. Below this is a search bar and user information. The main content area is titled 'Company Preferences' and has a 'Save' and 'Reset' button. A sidebar on the left lists various sections: General, Activities, Doc #s, Items (selected), Inventory, and Sales. The 'Items' section is expanded, showing the following settings:

- When searching for items on a document: 10 (dropdown)
- Search by search terms and whatever follows (not before).
- Exclude leading 0s from search.
- Sort by the shortest names first.

- Include the number of records - select amount of records using up or down arrow
- Exclude leading 0's from search.
- Sort by the shortest names first.

Other

The screenshot shows the 'Other' section of the 'Company Preferences' page. The 'Other' section is expanded, showing the following settings:

- Allow editing of an Item's properties inherited from its Item Group (Accounts and UOM). NOTE: When this preference is unchecked, changes made to the item group are applied to its items automatically.
- Update an Item's accounts when changing its Item Group.
- The 'Next Item No.' button looks at the last item created. Uncheck to look at the last alpha-numeric sequence number.
- By default new items being created will have Lot/Serial # tracking turned on
- Allow Duplicate UPCs
- Enable multiple units of measures
- Enable kit rules
- Allow style variants to be edited individually.
- Allow style variants to be added to orders individually.
- Include Non Inventory and Service Items in Reorder Analysis
- Kit Selection prices must be the same as its Item's price
- Disable Item Popup on Sales Orders, Ship Docs and Purchase Orders
- Warn when adding a duplicate line item to a Sales Order, Quote, Ship Doc, Customer Return, Purchase Order, Receiver or Vendor Return
- When an autocomplete searches by Name or Number, use the Name not the Full Name
- When printing transaction labels with items, sort by Item 'Name/Number' instead of 'Doc No'.
- Hide images while adding kit selections to a sales order
- Show Allocated quantity in Item Stats
- Stay on Items list when batch adding to open doc
- Show earliest PO only for On Order in Item Summary

- Allow editing of an Item's properties inherited from its Item Group (Accounts and UOM). NOTE: When this preference is unchecked, changes made to the item group are applied to its items automatically.
- Update an Item's accounts when changing its Item Group. (This will allow you to change the

accounts of the Item groups when moving them from one Group to another).

- The 'Next Item No.' button looks at the last item created. Uncheck to look at the last alpha-numeric sequence number.
- By default new items being created will have Lot/Serial # tracking turned on
- Allow Duplicate UPCs
- Enable multiple units of measures (This will allow you to use the UOM Sets that you set up and assign them to the items).
- Enable kit rules. (This will allow you to restrict kit options depending on what is previously selected in the Kit).
- Allow style variants to be edited individually. (By default style variants cannot only be edited through the style).
- Allow style variants to be added to orders individually. (By default styles are added a group to an order through the style).
- Include Non Inventory and Service items in Reorder Analysis
- Kit Selection prices must be the same as its item's price
- Disable Item Popup on Sales Orders, Ship Docs and Purchase Orders
- Warn when adding a duplicate line item to a Sales Order, Quote, Ship Doc, Customer Return, Purchase Order, Receiver or Vendor Return.
- When an autocomplete searches by Name or Number, use the Name not the Full Name
- When printing transaction labels with items, sort by item 'Name/Number' instead of 'Doc No'.
- Hide images while adding kit selections to a sales order
- Show Allocated quantity in Item Stats
- Stay on items list when batch adding to open doc
- Show earliest PO and onl yfor On Order in item Summary

Click **Save** when done.