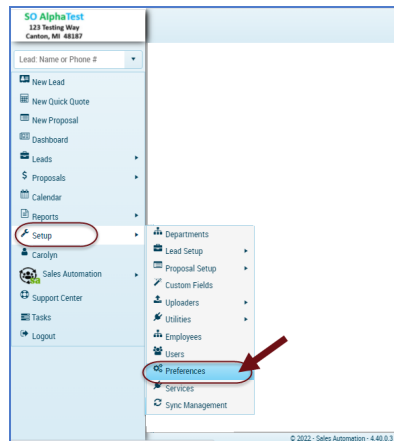


# Preferences

Last Modified on 07/27/2023 9:11 am EDT

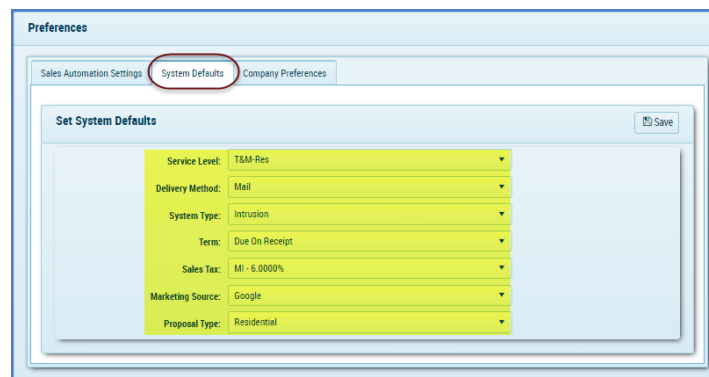
## System Defaults

Menu path: Setup > Preferences > System Defaults tab



System Defaults Tab – Verify that these fields are defined:

- Service Level
- Delivery Method
- System Type
- Term
- Sales Tax
- Marketing Source
- Proposal Type



## Company Preferences

Menu path: Setup > Preferences > Company Preferences tab

Company Preferences Tab – Verify that the Company Information is complete.

Preferences

Sales Automation Settings System Defaults **Company Preferences**

**Edit Company info** Save

Company: SO Alpha Test

Address: 123 Testing Way

Address 2:

City: Canton State: Michigan ZIP: 48187

Plus 4:

Phone: (734) 414-0700 ext.:

Phone 2: ext.:

Email: jesslyn@boldgroup.com

From Name: From Name:

Sending Email:

Company Website URL: URL:

Company Logo: Select files... Drop files here to upload

Logo Preview:

Invoice Logo: Select files... Drop files here to upload

Invoice Logo Preview:

Report Logo: Select files... Drop files here to upload

Report Logo Preview: