Preferences

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

System Defaults

Menu path: Setup > Preferences > System Defaults tab

SO AlphaTest 123 Testing Way Canton, MI 48187				
Lead: Name or Phone #	•			
New Lead				
🖩 New Quick Quote				
New Proposal				
EE Dashboard				
Leads	- +			
\$ Proposals				
Calendar				
Reports	- +			
(* Setup		A Departments		
Carolyn		Lead Setup		
Sales Automation		Proposal Setup	*	
G Support Center		Custom Fields		
ER Tasks		 Uploaders Utilities 	1	
C Logout		A Employees		•
		₩ Users		
	0	0° Preferences	4	
]	Services		
		C Sync Management		
				© 2022 - Sales Automation - 4.40.0.3

System Defaults Tab - Verify that these fields are defined:

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

ales Automation Settings (System Def	Company Preferences	
Set System Defaults		🖺 Save
Service Lo	el: T&M-Res	•
Delivery Met		•
System T	e: Intrusion	•
Т	m: Due On Receipt	•
Sales	BX: MI - 6.0000%	•
Marketing Sou	e: Google	•
Proposal T	e: Residential	•

Company Preferences

Menu path: Setup > Preferences > Company Preferences tab

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

les Automation Settings	System Defaults Company F	reletences				
Edit Company Info						🖺 S
Company: S0 Alpha Test			Company Logo:	Select files	Drop files here to upload	
Address:			Logo Preview:	SO AlphaTest	Ø	
123 Testing Way				Canton, MI 48187		
Address 2			Invoice Logo:	Select files	Drop files here to upload	
Canton	Michigan	• 48187		CO AlebaTest		
Plus 4			Invoice Logo Preview:	SO AlphaTest 123 Testing Way	C2	
Phone:	(734) 414-0760	ext.		Canton, MI 48187		
Phone 2:		ext.	Report Logo:	Select files	Drop files here to upload	
Email:	jesslynnk@boldgroup.com	0	Report Logo Preview;	SO AlphaTest		
From Name:	From Name:			123 Testing Way Canton, MI 48187	(K)	
Sending Email:	0			Canton, IVII 40107		