

Changing System Default Settings

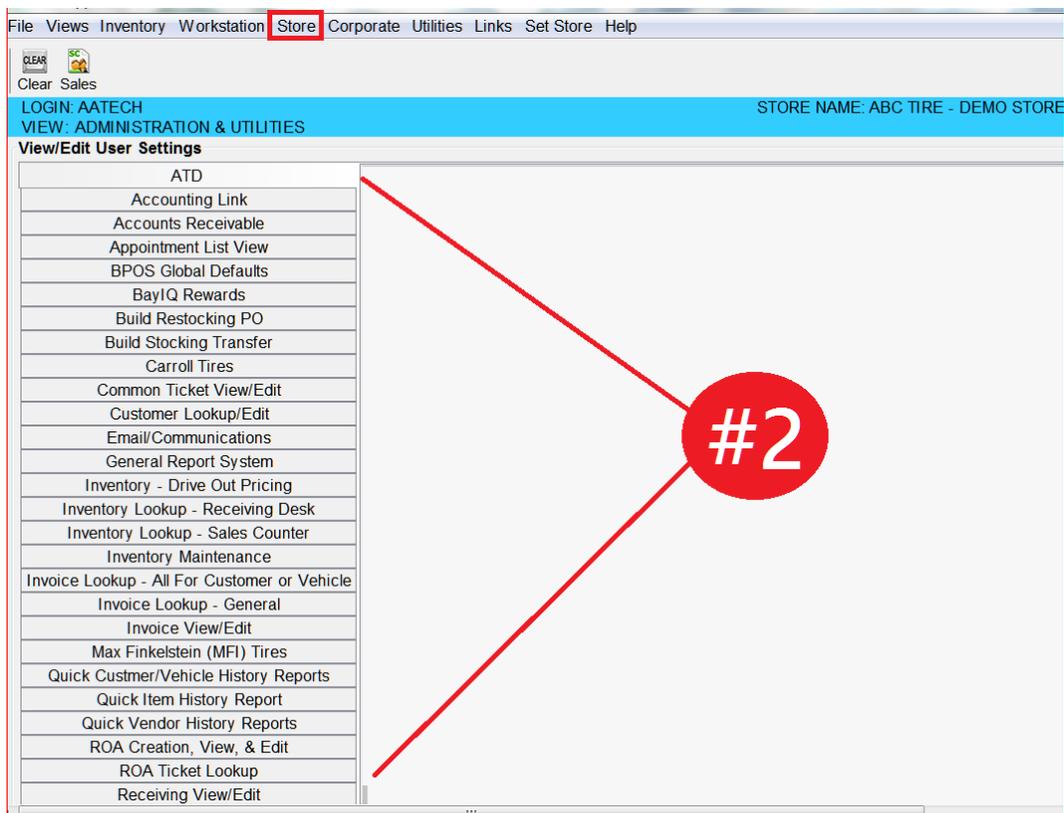
AV #713

BPOS allows you to change settings and behaviors for a number of screens in BPOS. While we won't review every single option here, we will give an overview of the various options and go over where and how to change your system defaults.

Once you are in your View/Edit Default Settings screen, you will see is a list of all the various areas in BPOS in which you are allowed to make edits listed down the left-hand side of your screen. You can edit everything from your Invoice screen to your Drive Out Pricing options to how the Customer/Vehicle Lookup screens return data. There are also defaults for Receiving functions, Bookkeeping functions, and some 3rd-party integrations.

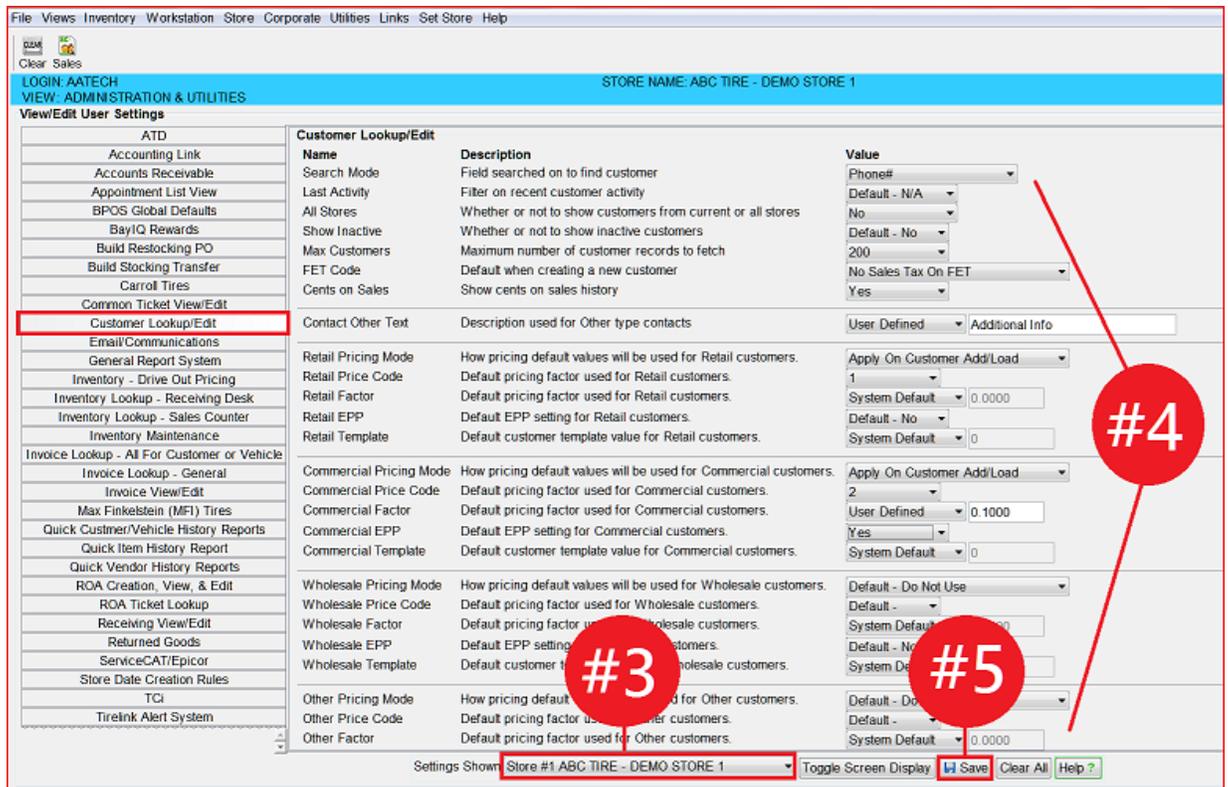
To Edit Settings:

1. Click on **Views** → **Administration & Utilities** → **System** → **View/Edit Default Settings**
2. Select the **Category** you wish to edit from the options on the left-hand side of the screen:



(Continued on Next Page)

3. Select the appropriate store location from the **Settings Shown** drop-down menu at the bottom of the screen. You can set default settings for Corporate which affects all locations or you can set options for each individual location. (Please note that store settings override Corporate settings. In other words, you can set the Corporate Inventory Lookup screen to always display out-of-stock and negative inventory items. However, someone with password permission could edit store #2 to only show what is in stock which overrides the corporate setting for store #'s location only.)
4. Make your changes
5. Click **Save** at the bottom of the screen. Everyone will need to log out and back in to recognize those changes:



Name	Description	Value
Search Mode	Field searched on to find customer	Phone#
Last Activity	Filter on recent customer activity	Default - N/A
All Stores	Whether or not to show customers from current or all stores	No
Show Inactive	Whether or not to show inactive customers	Default - No
Max Customers	Maximum number of customer records to fetch	200
FET Code	Default when creating a new customer	No Sales Tax On FET
Cents on Sales	Show cents on sales history	Yes
Contact Other Text	Description used for Other type contacts	User Defined Additional Info
Retail Pricing Mode	How pricing default values will be used for Retail customers.	Apply On Customer Add/Load
Retail Price Code	Default pricing factor used for Retail customers.	1
Retail Factor	Default pricing factor used for Retail customers.	System Default 0.0000
Retail EPP	Default EPP setting for Retail customers.	Default - No
Retail Template	Default customer template value for Retail customers.	System Default 0
Commercial Pricing Mode	How pricing default values will be used for Commercial customers.	Apply On Customer Add/Load
Commercial Price Code	Default pricing factor used for Commercial customers.	2
Commercial Factor	Default pricing factor used for Commercial customers.	User Defined 0.1000
Commercial EPP	Default EPP setting for Commercial customers.	Yes
Commercial Template	Default customer template value for Commercial customers.	System Default 0
Wholesale Pricing Mode	How pricing default values will be used for Wholesale customers.	Default - Do Not Use
Wholesale Price Code	Default pricing factor used for Wholesale customers.	Default -
Wholesale Factor	Default pricing factor used for Wholesale customers.	System Default 0.0000
Wholesale EPP	Default EPP setting for Wholesale customers.	Default - No
Wholesale Template	Default customer template value for Wholesale customers.	System Default
Other Pricing Mode	How pricing default values will be used for Other customers.	Default - Do Not Use
Other Price Code	Default pricing factor used for Other customers.	Default -
Other Factor	Default pricing factor used for Other customers.	System Default 0.0000

Settings Shown: Store #1 ABC TIRE - DEMO STORE 1 | Toggle Screen Display | Save | Clear All | Help ?

Note – Users must have password permission to access and edit these default settings (P99). If you need to give a user permission to have the permission setting, please contact your system administrator.