

## **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 3<sup>rd</sup>-party integrations.

## To Edit Settings:

 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:

File Views Inventory Workstation Store Corporate Utilities Links Set Store Help			
Date Sales			
LOGIN: AATECH STORE NAME: ABC TIRE - DEMO STORE 1			
VIEW: ADMINISTRATION & UTILITIES ViewEnd Lear Sattinge			
ATD ATD	Customer Lookum/Edit		
Alb	Customer LookuprEdit	Description	Makes
Accounting Link	Name Coarch Mode	Eicld searched on to find surfaces	Object
Accounts Receivable	Jest Astuty	Filed searched on to mid customer	Phone#
PDOC Clobal Defaults	Lasi Acuvity	Whether execution activity	Default - N/A 🔻
PoulO Demarda	All Stores	whether or not to show customers from current or all stores	No
Build Dectocking DO	Show Inactive	Whether or not to show inactive customers	Default - No -
Puild Resident Transfer	Max Customers	Maximum number of customer records to fetch	200 •
Cerrel Tires	FET Code	Default when creating a new customer	No Sales Tax On FET -
Common Ticket View/Edit	Cents on Sales	Show cents on sales history	Yes •
Customer Lookun/Edit	Contact Other Text	Description used for Other type contacts	User Defined × Additional lofo
Email/Communications			Maditional Into
General Report System	Retail Pricing Mode	How pricing default values will be used for Retail customers.	Apply On Customer Add/Load
Inventory - Drive Out Pricing	Retail Price Code	Default pricing factor used for Retail customers.	1 •
Inventory Lookup - Receiving Desk	Retail Factor	Default pricing factor used for Retail customers.	System Default • 0.0000
Inventory Lookup - Sales Counter	Retail EPP	Default EPP setting for Retail customers.	Default - No
Inventory Maintenance	Retail Template	Default customer template value for Retail customers.	System Default • 0
Invoice Lookup - All For Customer or Vehicle			
Invoice Lookup - General	Commercial Pricing Mode	How pricing default values will be used for Commercial customers.	Apply On Customer Add/Load
Invoice View/Edit	Commercial Price Code	Default pricing factor used for Commercial customers.	2 •
Max Finkelstein (MFI) Tires	Commercial Factor	Default pricing factor used for Commercial customers.	User Defined • 0.1000
Quick Custmer/Vehicle History Reports	Commercial EPP	Default EPP setting for Commercial customers.	Yes •
Quick Item History Report	Commercial Template	Default customer template value for Commercial customers.	System Default • 0
Quick Vendor History Reports			
ROA Creation, View, & Edit	Wholesale Pricing Mode	How pricing default values will be used for Wholesale customers.	Default - Do Not Use 🔹
ROA Ticket Lookup	Wholesale Price Code	Default pricing factor used for Wholesale customers.	Default - 🔻
Receiving View/Edit	Wholesale Factor	Default pricing factor under the bolesale customers.	System Default
Returned Goods	Wholesale EPP	Default EPP setting stomers.	Default - No
ServiceCAT/Epicor	Wholesale Template	Default customer the second seco	System De
Store Date Creation Rules			
TG	Other Pricing Mode	How pricing default d for Other customers.	Default - Do
Tirelink Alert System	Other Price Code	Default pricing factor us	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.