



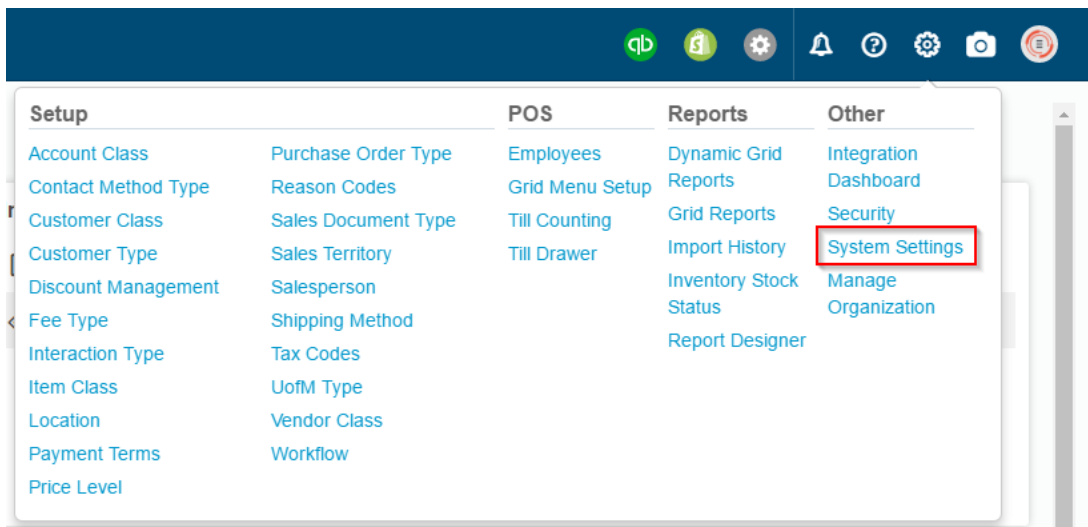
## System Settings

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### Overview

The System Settings function of SalesPad Cloud allows you to control the settings for various vital components of your SalesPad Cloud company.

Navigate to the Settings menu and click **System Settings**.



This opens the System Settings window. Available settings categories are listed to the left. To adjust settings for a particular category, select that category. Fields available to edit will appear to the right of the categories list.

A list of available fields, along with brief explanation of each field, for each settings category follows:

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#### **Company Settings**

*Assembly Adjustment Account* - This is the assembly adjustment account.

*Automatically Generate SKUs* - This enables stock keeping unit (SKU) generation based on the SKU entity number. Enabling this setting will back-fill all inventory type item masters with a SKU.

*Default Asset Account* - This is the default asset account on an item. This account will be used if the Asset Account isn't set for an inventory item.

*Default Cogs Account* - This is the default account for cost of goods sold on an item. This account will be used if the Expense Account isn't set for an inventory item.

*Default Expense Account* - This is the default expense account on an Item Master. This account will be used if the Expense Account isn't set on a non-inventory item.

*Default Income Account* - This is the default account for income on an item. This account will be used if the Income Account isn't set for an inventory item.

*Default Shipping Tax* - This is the Tax Schedule used for shipping tax on sales documents. When empty, the default Non-Taxable Tax Schedule will be used instead. It is recommended that this Tax Schedule contain all of the Tax Codes for states and agencies that collect tax on shipping. Your contacts' Tax Schedules should contain the matching Tax Codes if they are inside the area of any Tax Agency you collect tax for.

*Default Tax Schedule* - This is the Tax Schedule that will be used if no Tax Schedule is provided on a document or line.

*Inventory Adjustment Account* - This is the inventory adjustment account.

*Line Level Taxes Enabled* - This setting selectively enables tax grouping support for sales and purchasing transactions.

*Post Time Zone* - This setting determines which time zone will be used when posting documents.

*Auto Assign Lot Number Format* - This is the format used to auto-generate lot numbers, the default is {0:yyyyMMdd}\_{1:0000}.

- The default format provided by SalesPad Cloud is the date the item was received on (20160819) followed by a lot number. Lot numbers are assigned in an ascending fashion, so your first serial number will be 0000, the next 0001, etc. You are free to alter the format in this setting, as long as the value you enter is a C# format string. For more information on C# scripts, check out this article.

*Auto Assign Serial Number Format* - This is the format used to auto-generate serial

numbers, the default is {0:yyyyMMdd}\_{1:0000}.

- The default format provided by SalesPad Cloud is the date the item was received on (20160819) followed by a serial number. Serial numbers are assigned in an ascending fashion, so your first serial number will be 0000, the next 0001, etc. You are free to alter the format in this setting, as long as the value you enter is a C# format string. For more information on C# scripts, check out this article.

*Contact Used For Tax* - This is the Contact used for calculating tax on sales documents. Defaults to the Shipping Contact.

*Default Gift Card Account* - This is the default income account used for gift cards.

*Default Purchase Clearing Account* - This is the default purchases clearing account to be used when the vendor bill (in QuickBooks) is created separately from the purchase receipt. This account will be used to hold funds based on posting the purchase receipt, and will be cleared when the vendor bill is created.

*Default Uofm Schedule* - This is the default Uofm Schedule for an item. This Uofm Schedule will be used if the Uofm Schedule isn't set on an item.

*Default Valuation Method* - This is the default valuation method for items.

*Deposit Item* - This is the item used for deposits on sales documents.

*Dropship Adjustment Account* - This is the dropship adjustment account.

*Fulfill Document Hold Alert* - This alert is used to hold a sales document from fulfilling. The sales document will be held and display a message describing the hold only if the alert is active. Defaults to 'Fulfill Hold.'

*Item Class Required On Items* - This forces an Item Class to be required when creating or editing an item.

*Post Document Hold Alert* - This alert is used to hold a sales document from posting. The sales document will be held and display a message describing the hold only if the alert is active. Defaults to 'Post Hold.'

*Transfer Document Hold Alert* - This alert is used to hold a sales document from transferring to another Sales Document Type. The sales document will be held and display a message describing the hold only if the alert is active. Defaults to 'Transfer Hold.'

#### **Data Import Settings**

*Default Import Time Zone* - This setting determines which time zone will be used when importing dates.

*Default Purchase Order Type* - This is the default Purchase Order Type that will be used on purchase order data imports if no type is given.

*Default Sales Document Type* - This is the default Sales Document Type that will be used on

sales document data imports if no type is given.

*Sales Document New Document Designator* - When sales documents and line items are imported, lines will be split into documents based on this field's value.

#### **Email Settings**

*Default Email* - This setting determines the default email address that will be used for this company's sent emails.

*Default Email Subject* - This setting is used to generate the default subject line for emails.

#### **Integration Settings**

*Automatically Reattempt Exports* - Turning this value on will cause integrations to automatically retry failed exports, instead of requiring the user to find and fix issues.

#### **Inventory Settings**

*Default Price Level* - This is the default Price Level for new items, if one isn't specified.

#### **POS Integration Settings**

*Export Summary Receipts* - This indicates whether summary transactions are exported to QuickBooks, rather than individual sales receipts and refund receipts.

*Summary Deposit To Account* - This is the account funds are deposited to when creating summary receipts.

*Summary Non Taxable Item* - This is the item used for non-taxable items when exporting summary receipts.

*Summary Receipt Customer* - This is the customer used when exporting summary receipts.

*Summary Taxable Item* - This is the item used for taxable items when exporting summary receipts.

*Uses POS Features* - This indicates whether the company will use POS features and enables POS screens.

#### **Payment Settings**

*Default GateWay* - This is the processor used for making credit card transactions.

*Default Payment Processor* - This is the processor used for making credit card transactions.

#### **Purchasing Settings**

*Automatically Generate Vendor Invoice* - Preferred behavior for generating vendor invoices during purchase receipt posting.

*Default PO Type for Location Generation* - Purchase Order Type used when generating POs based off of Reorder Point information.

*Enable Landed Cost* - Enables the Landed Cost setup screens as well as the Landed Cost tabs on purchase orders, purchase receipts, and vendor invoices.

*Purchase Generation Default Location* - Default Location used when Purchase Generation is

loaded.

*Purchase Generation Default Location Qty* - The Default Quantity to use when loading Item and Location information for Purchase Generation.

*Purchase Generation Default Source* - The Backorder option will pull the quantity needed to fulfill all unpurchased quantity on backordered sales lines, as well as the Location's restock amount. The Dropship option will only pull unpurchased quantity for dropshipped sales lines. The Reorder Point option will only pull for a Location's restock amount.

*Purchase Generation Default Vendor* - Default vendor used when Purchase Generation is loaded.

#### **QuickBooks Online Import Settings**

*Automatically Generate Vendor Bill* - This determines the preferred behavior for generating vendor bills during purchase receipt posting.

*Deposit Liability Account* - This is the account used for credited deposit journal entries.

*Disable Sales Document Override* - Disables sales document overriding when changes happen in QBO.

*Discount Item* - This is the item used for the discount line for the vendor bill in QBO.

*Export Error Email* - This email account will receive an email whenever errors occur during exports.

*Field For Customer PO* - Determines what QBO field to export an invoice's Customer Purchase Order field to.

*Import QuickBooks Credit Memo As* - This is the Sales Document Type that will be assigned to credit memos imported from QBO. Defaults to 'Return.'

*Import QuickBooks Estimates As* - This is the Sales Document Type that will be assigned to estimates imported from QBO. Defaults to 'Estimate.'

*Import QuickBooks Invoices As* - This is the Sales Document Type that will be assigned to invoices imported from QBO. Defaults to 'Invoice.'

*Import QuickBooks Purchase Order Type As* - This is the Purchase Order Type that will be assigned for QBO-integrated purchase orders.

*Import QuickBooks Refunds As* - This is the Sales Document Type that will be assigned to sales refunds imported from QBO. Defaults to 'Refund.'

*Import QuickBooks Sales Receipts As* - This is the Sales Document Type that will be assigned to sales receipts imported from QBO. Defaults to 'Sales Receipt'

*Shipping Amount Item* - This is the item used for the Shipping Line for Freight Costs in QBO.

*Summary Cutoff Time* - This is the cut-off time at which all summary receipts and refunds will be exported.

*Summary Cutoff Time Zone* - This setting determines which time zone will be used when evaluation the 'Summary Cutoff Time' setting.

*Tip Item* - This is the item used for tips on sales documents in QBO.

*Undeposited Funds Account* - This is the account used for debited deposit journal entries.

*Update List Price* - Forces List Price to be updated if changed in QBO.

*Importing Enabled* - This indicates whether importing from QBO is enabled.

*Exporting Enabled* - This indicates whether exporting to QBO is enabled.

#### **QuickBooks Online Setup Settings**

*Default Sales Contact for Exporting* - This is the contact that will be used when exporting a sales document through QuickBooks Online.

*Inactive Item* - When this setting is enabled, all inactive QBO items will be mapped to this item.

*Map Inactive Items To One Item* - Enabled the *Inactive Item* setting, which maps all inactive QBO items to one item.

#### **Sales Settings**

*Apply Tax After Discount* - This determines if new sales documents default to tax prior to or after discount.

*Payment Terms Discount Item* - This is the item used when a Terms Discount line is created on a sales document.

*Write Off Item* - This is the item used when a Write Off line is created on a sales document.

#### **Shipping Settings**

*Shipping Country Default* - This is the two-digit country code to use when shipping for customers who don't have an explicitly defined country on addresses.

#### **Shopify Integration Settings**

*Anonymous Shopify Customer* - This is the customer that all Shopify orders without customers will use in SalesPad Cloud.

*Automatic Dropship Storage* - This allows Shopify to automatically split oversold lines on import and mark them as dropship.

*Default Shopify Location* - This is the default Location that will be assigned to imported Shopify items.

*Default Shopify Receipt Type* - This is the default Sales Document Type for Shopify receipts.

*Ignore Shipping Amount Updates* - This setting determines whether or not sales documents originating from Shopify automatically ignore non-SalesPad Cloud updates to the Shipping field.

*Shopify Integration Is Live* - An inventory adjustment named 'Shopify Inventory Integration' was created when Shopify was connected to your account. This inventory adjustment must be posted before the Shopify integration can be set to live. Once this setting is set to live, all Shopify Orders will be integrated and SalesPad Cloud will begin managing inventory.

*Shopify Tax Account* - This is the other current liability account that will be assigned to the Shopify Tax Item specified under the 'Shopify Tax Item' setting.

*Shopify Tax Item* - This is the item master that all Shopify tax lines will fall under.