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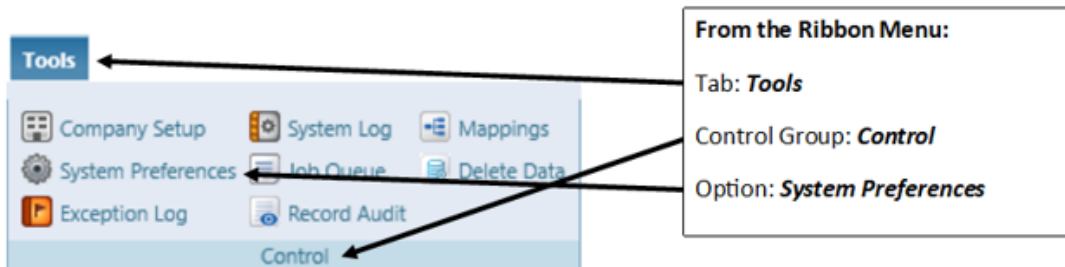
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Default Processes

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

Default Processes

Default Processes can be assigned in System Preferences. Use the Processes for each that you use most often.



Simplify tracking by selecting a Default Process for Customers, Vendors, and Orders. Only one default can be selected for each type.

System Preferences ✕

Save Cancel Close

▼ **Company Wide**

▼ **Quote Preferences**

▲ **Order Preferences**

Last Order Number Assign each order number.

Automated Order Import User

Automatically close orders once the following associated transaction(s) are complete

Close orders

Tracking - Process Defaults

Customer Edit Vendor

Only one default can be selected for Customers, Vendors, Quotes and Orders by either using the search tool or type the description to speed search.

Description	Type	Status
(Select)		<input type="checkbox"/>
Blank Good Vendor Process	Vendor	<input type="checkbox"/> Active
Decorating Vendor	Vendor	<input type="checkbox"/> Active
Super Vendor	Vendor	<input type="checkbox"/> Active
Vendor	Vendor	<input type="checkbox"/> Active
vendor-angle	Vendor	<input type="checkbox"/> Active

- These default assignments will populate into each order. However, each process can be replaced or edited on the order itself.
- The customer process will default when a customer is assigned to the order. The order process will default when the order is created, and the vendor process will default for each vendor listed on the order's product lines.
- **NOTE:** Although the same default vendor process will populate for all the vendors on an order, **each** vendor can have a unique vendor process on the order.