

## Summary

When creating or editing documents, it's useful to be able to set certain settings to defaults, change the effects of certain actions on the documents, or find out why something is not performing as desired.

## Step-by-step guide

- 1. Go to Administration->System Initialization->Document Settings
- 2. In this window, you will have two tabs:
- 1. The General tab allows you to change settings for all documents
- 2. The Per Document tab allows you to select a specific document in the Document field and set the settings for that document

	V Document Settings		Document Settings			X	Look up master data and documents	Search
Administration	General Per Document		General	Per Document				
Choose Company	Calculate Gross Profit		Contraction	En poconnent			and Alerts	4
Exchange Rates and Indexes	Base Price Origin Last Evaluated Price	Inve		Pick List   Capitalization	_			
m System Initialization	Default Gross Profit % for Service Documents		Display Only Paid		weer			08/19/2014
Company Details	O Profit/Sales Price				-		Variance > 10%	08/26/2014
General Settings	Proft/Base Price     Document Remarks Includes		When creating a delve Automatically of		k and pack process: t or reserve invoice		ance > 25%	08/22/2014
Posting Periods	Base Document Number			Delivery	of reading the first occ		lance > 10%	08/26/2014
Authorizations	O BP Reference Number		Consider Sales Do	Returns A/R Down Payment	he Pick and Pack Process		> 25%	08/22/2014
	For a Sales BOM in Documents, Display: Price and Total for Parent Item Only	0	• B	A/R Down Payment A/R Invoice			10 Days	10/24/2014
Cocument Numbering	Price for Component Items		<b>b</b> 0	A/R Credit Memo			Variance - 7 days	10/24/2014
Document Settings	Response to Release / Receipt of Inventory Outside Defined Range Without Warning		<b>D</b> 0	Dealers Barriet	-			09/30/2014
Print Preferences	Without Warning     Warning Only			Purchase Request Purchase Quotation			dded	10/22/2014
Menu Structure	O Block Release / Receipt			Purchase Order				20/22/2014
E-Mail Settings	Block Negative Inventory By     Born Setting     Rounding Method			Goods Receipt PO Goods Return				
	By Currency			A/P Down Payment				
Dpening Balances	By Document Exchange Rate Rase Date (A/P Documents) Porting Date			A/P Invoice				
Implementation Center				A/P Credit Memo				
E Setup	Display Rounding Remark			Landed Costs				
Data Import/Export	Vise Warehouse Address V Manage Preight in Documents	Setup		Incoming Payment	-			
Utilities	8 lock documents with earlier Posting Date			Deposit				
	Allow Future Posting Date     Use Document Exchange Rate When Copying to Target Document			Outgoing Payment Postdated Deposit				
Approval Procedures				Check for Payment				
E License				Journal Entry				
Entegration Service	Manage Inventory by Warehouse			Journal Voucher				
Add-Ons				Goods Receipt	-			
Workflow				Goods Issue Inventory Transfer Request				
Alerts Management	Display Canceled and Cancelation Marketing Documents in Reports			Inventory Transfer				
BI OnDemand Integration	Max. No. of Days for Canceling Marketing Documents Before or After Posting 90			Production Order				
Financials				Inventory Revaluation Pick List				
				Inventory Counting				
Sales Opportunities				Inventory Posting				
Sales - A/R	glock Hultple Blanket Agreements for Same A/P Document			Inventory Opening Balances				
? Purchasing - A/P	Block Multiple Blanket Agreements for Same A/R Document							
Business Partners								
Banking	OK Cancel		OK Cano					
Inventory								
Production								
MRP								

Note: If you cannot access Document Settings, you may lack authorizations. You may have to have a superior change this for you. Please refer to this Quick Start Guide to help you.

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