

Date Defaults Tab

System Config > Defaults > Date Defaults

Set the date from and date to for document searches

Copy to All

The screenshot shows the 'System Defaults' window with the 'Date Defaults' tab selected. A red box highlights the 'Copy To All' button, which is located next to the 'Date From Days' and 'Date To Days' fields. The 'Date From Days' field is set to 60 and the 'Date To Days' field is set to 0. Below this, there are sections for 'Debtors' and 'Creditors' with various search date ranges.

Section	Search Type	Date From Days	Date To Days
Debtors	Quotation Search:	30	0
	Sales Order:	30	0
	Invoice Search:	30	0
Creditors	Purchase Order search:	30	0
	Receive Stock Search:	90	0
	Delivery Note Search:	14	0
	Goods Received Stock Search:	30	0
	Stock Return Search:	30	0

Debtors searches

System Defaults

 Save Please Note: Remember to save your default setting before leaving this window.

System Defaults General Ledger Debtors Supplier Inventory Webatar Job Costing Email **Date Defaults**

Copy To All

Date From Days: 60 days Date To Days: 0 days

 Copy To All

Debtors

Quotation Search:
Date From Days: 30 days Date To Days: 0 days

Invoice Search:
Date From Days: 30 days Date To Days: 0 days

Sales Order:
Date From Days: 30 days Date To Days: 0 days

Credit Note Search:
Date From Days: 30 days Date To Days: 0 days

Creditors

Purchase Order search:
Date From Days: 30 days Date To Days: 0 days

Goods Received Stock Search:
Date From Days: 30 days Date To Days: 0 days

Receive Stock Search:
Date From Days: 90 days Date To Days: 0 days

Stock Return Search:
Date From Days: 30 days Date To Days: 0 days

Delivery Note Search:
Date From Days: 14 days Date To Days: 0 days

Creditors searches

System Defaults

 Save Please Note: Remember to save your default setting before leaving this window.

System Defaults General Ledger Debtors Supplier Inventory Webatar Job Costing Email **Date Defaults**

Copy To All

Date From Days: 60 days Date To Days: 0 days

 Copy To All

Debtors

Quotation Search:
Date From Days: 30 days Date To Days: 0 days

Invoice Search:
Date From Days: 30 days Date To Days: 0 days

Sales Order:
Date From Days: 30 days Date To Days: 0 days

Credit Note Search:
Date From Days: 30 days Date To Days: 0 days

Creditors

Purchase Order search:
Date From Days: 30 days Date To Days: 0 days

Goods Received Stock Search:
Date From Days: 30 days Date To Days: 0 days

Receive Stock Search:
Date From Days: 90 days Date To Days: 0 days

Stock Return Search:
Date From Days: 30 days Date To Days: 0 days

Delivery Note Search:
Date From Days: 14 days Date To Days: 0 days

CRM interactions searches

System Defaults

Save

Please Note: Remember to save your default setting before leaving this window.

Interactions

Memo Search:

Date From Days: 90 days

Date To Days: 0 days

Sales Leads Search:

Date From Days: 60 days

Date To Days: 0 days

Support Log Search:

Date From Days: 5 days

Date To Days: 0 days

Time Log Search:

Date From Days: 7 days

Date To Days: 0 days

User Time Log Search:

Date From Days: 7 days

Date To Days: 0 days

Support Log Due Date:

Date To Days: 7 days

Job Costing

Manage Job Search:

Date From Days: 90 days

Date To Days: 0 days

Manage Job History Search:

Date From Days: 90 days

Date To Days: 0 days

Date Period Setup for POs and Quotes

Enter the number of days from the current date for the:

Purchase Order's Due Date (Max 30 days):

Quote's Valid Date:

Quote's Delivery Date:

Adjust delivery date according to:

☒ Quote Date

☐ Customer Approval Date

Make delivery date and completion date the same:

☒

Job costing searches

System Defaults

 Save Please Note: Remember to save your default setting before leaving this window.

Interactions

Memo Search:
Date From Days: days Date To Days: days

Sales Leads Search:
Date From Days: days Date To Days: days

Support Log Search:
Date From Days: days Date To Days: days

Time Log Search:
Date From Days: days Date To Days: days

User Time Log Search:
Date From Days: days Date To Days: days

Support Log Due Date:
Date To Days: days

Job Costing

Manage Job Search:
Date From Days: days Date To Days: days

Manage Job History Search:
Date From Days: days Date To Days: days

Date Period Setup for POs and Quotes

Enter the number of days from the current date for the:

Purchase Order's Due Date (Max 30 days):

Quote's Valid Date:

Quote's Delivery Date:

Adjust delivery date according to:

☒ Quote Date

☐ Customer Approval Date

Make delivery date and completion date the same: ☒

Date Period setup for POs and quotes

System Defaults

 Save

Please Note: Remember to save your default setting before leaving this window.

Interactions

Memo Search:
Date From Days: 90 days Date To Days: 0 days

Sales Leads Search:
Date From Days: 60 days Date To Days: 0 days

Support Log Search:
Date From Days: 5 days Date To Days: 0 days

Time Log Search:
Date From Days: 7 days Date To Days: 0 days

User Time Log Search:
Date From Days: 7 days Date To Days: 0 days

Support Log Due Date:
Date To Days: 7 days

Job Costing

Manage Job Search:
Date From Days: 90 days Date To Days: 0 days

Manage Job History Search:
Date From Days: 90 days Date To Days: 0 days

Date Period Setup for POs and Quotes

Enter the number of days from the current date for the:

Purchase Order's Due Date (Max 30 days):

Quote's Valid Date:

Quote's Delivery Date:

Adjust delivery date according to:

☒ Quote Date

☐ Customer Approval Date

Make delivery date and completion date the same:

☒

Revision #2

Created 17 July 2023 21:36:33 by Paige

Updated 21 November 2024 20:55:39 by Malcolm