

Defaults

Last Modified on 01/05/2023 4:13 pm EST

Set system defaults to make it easier to run daily activities. Click "Defaults" under "Company Info" in the Setup Table.

*Note: you may want to complete the remainder of the setup table before you customize the drop downs in the default tab.

Editing Defaults

Set System Defaults

Save
Default Options:
Next Customer Number: 1172
Next Invoice Number: 10945
Next Vendor Number: 10001
Next Purchase Order Number: 10002
Accounting Lockdown Date: 1/1/2014
Fiscal Year: 1/1/2013
Labor Warranty: 90 Day Warranty
Part Warranty: 90 Day Warranty
Service Level: T&M
Invoice Delivery: Mail
New Work Order Status: New
CC/eCheck Funding Month: Current Month
Email RMR Payment Receipt:

Customer Type: Residential
System Type: Burglar Alarm
Billing Cycle: Monthly
Term: Due on Receipt
Sales Tax: None - 0.000%
Country: United States
- Customer Portal Defaults -
Work Order Type: Inspection
Work Order Status: New

Recurring Invoice Memo:

Next Customer/Invoice/Vendor/Purchase Order Number

Set up starting numbers to identify customers, invoices, vendors, and purchase orders (AlarmBiller will automatically increment by one as these values increase).

Accounting Lockdown Date

This feature prevents anyone from editing invoices, credits, or other data dated prior to the lockdown date.

Fiscal Year

Set to the start date of your business year.

Email RMR Payment Receipt

By selecting this option, your recurring customers who are set to autopay, and have an email address, will receive a payment receipt. This cannot be individualized per customer, it is an all customers or no customers option.

*Note: RMR stands for Recurring Monthly Revenue.

Recurring Invoice Memo

Enter a message that will appear on all of your Recurring Invoices, for example, "Thank you for your business!".

Remaining Fields

All of these fields can be over-ridden when adding customers, they are just defaults that will populate with the most commonly used selections.

Saving Defaults

click the "save" button in the upper right corner to update.