

# Site Settings User Guide

## Admin Panel

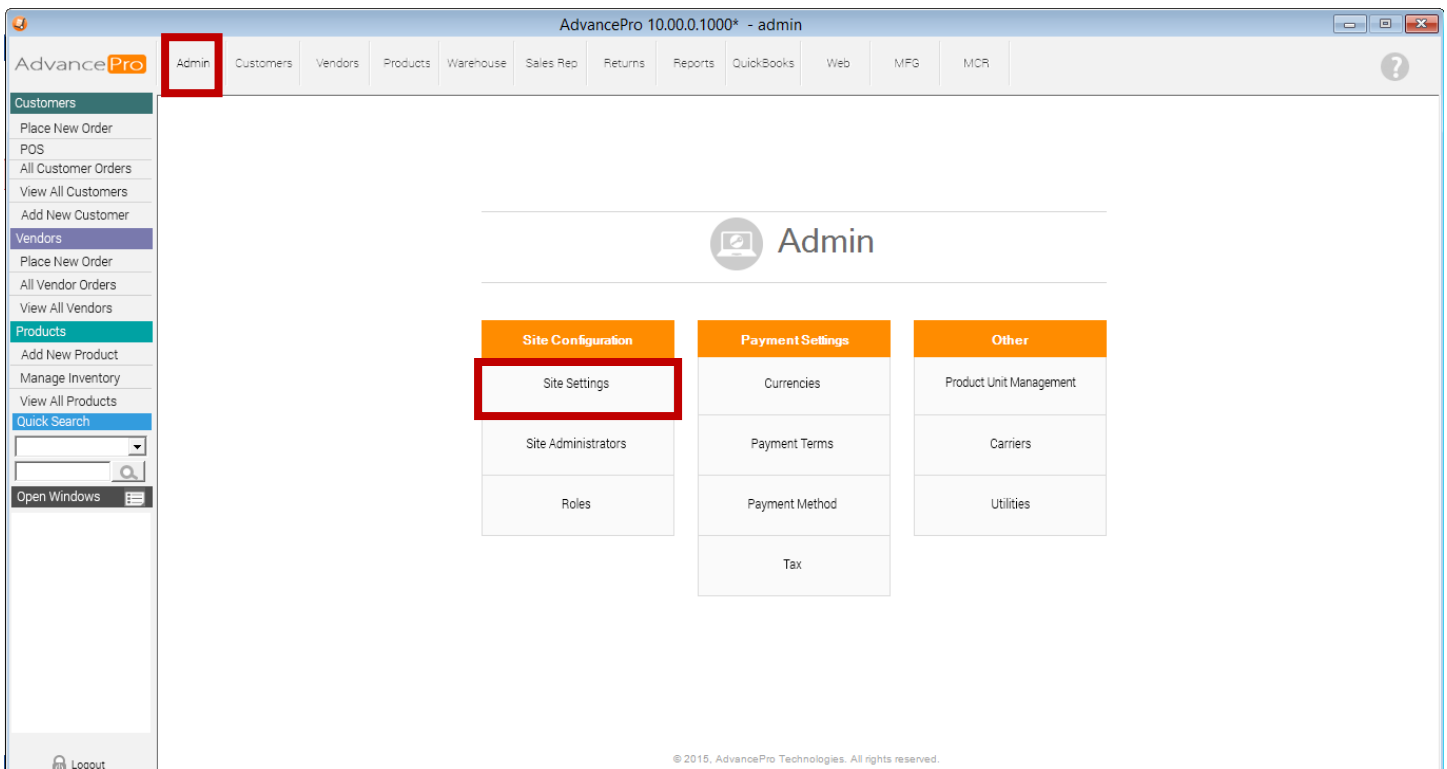
AdvancePro has a wide feature set catering to the needs of users in many industries. Using the Admin panel, AdvancePro can be further customized to meet your specific needs.

## Site Settings

The Site Settings section of the Admin panel enables you to setup your workspace and other features that are important when setting up AdvancePro. This feature guide walks you through the various options available to you so you can optimize your setup.

The Site Settings can be accessed by:

1. Click "Admin"
2. Click "Site Settings"



## Company Information

In this screen, you can personalize your copy of AdvancePro by entering your company information.

1. Fill in your information. The fields indicated by orange text are mandatory (Company, Name, Phone, Address, City, State and Zip Code).  
NOTE: The "Order Alert Email" field is only applicable for those using AdvancePro Web Services.
2. Save or discard your changes.
  - a. Click "Save & Close" to save your changes and close the Site Settings menu.
  - b. Click "Save & Next" to save your changes and keep working within the Site Settings menu.
  - c. Click "Close" to discard the changes you have made without saving.

The screenshot shows a web application window titled "Site Settings" with several tabs: "Company Information", "General Settings", "Additional Setting", "Printing Settings", "Site Wide Settings", "My WorkSpace", "Additional Favorite Links", "QuickBooks", "Custom Fields", "Custom Fields 2", "UOM Settings", and "Email Setting". The "Company Information" tab is active, displaying a form to manage company information. The form includes fields for Company Name (APT1), Name (APT One), Phone (111 1111111111), Fax, Order Alert Email, Additional Email, Address (Once), City (First), State (AK), State Other, Zip Code (1800), Country (US), and Federal Tax ID. A "Send Alert" checkbox is also present. A note states: "NOTE: Emails sent from AdvancePro and emails received from Web Services will use this address." At the bottom, there are three buttons: "Save & Close", "Save & Next", and "Close".

Site Settings

Company Information | General Settings | Additional Setting | Printing Settings | Site Wide Settings

My WorkSpace | Additional Favorite Links | QuickBooks | Custom Fields | Custom Fields 2 | UOM Settings

Email Setting

Manage your company information and application preferences.

**Company** APT1

**Name** APT One

Mr/Ms/... First Name M.I. Last Name

**Company Address Details**

**Phone** 111 1111111111

Code Number Ext.

**Fax**

Code Number Ext.

**Order Alert Email** Send Alert

NOTE: Emails sent from AdvancePro and emails received from Web Services will use this address.

**Additional Email**

**Address** Once

**City** First **State** AK State Other

**Zip Code** 1800 **Country** US

**Federal Tax ID**

Save & Close Save & Next Close

## General Settings

In this screen, you can set your default currency and weight measurements. You can also set up your logo for printed documents, your target stock level and additional default settings.

1. Select your default currency.

NOTE: The list of default currencies is created in the “Admin” menu. If your currency does not appear here, you can always add it from that screen.

2. Select your default weight measurement, whether it is lbs or KG.
3. Select your logo for print. It must be a jpg or bmp file.

NOTE: For best results:

- 1) Logo should be 1 inch x 1 inch in size, otherwise it may appear distorted
- 2) Use 300 dpi (dots per inch) for best quality

The screenshot shows the 'Site Settings' application window with the following sections and controls:

- Navigation Tabs:** Company Information, General Settings (selected), Additional Setting, Printing Settings, Site Wide Settings, My WorkSpace, Additional Favorite Links, QuickBooks, Custom Fields, Custom Fields 2, UOM Settings, Email Setting.
- Default Currency Setting:**
  - NOTE: In order for the new currency to take effect, you will need to restart AdvancePro.
  - Currency: US Dollar (dropdown menu)
- Default Weight Measurements:**
  - i.e. For pounds type in lbs; for kilograms type in kg etc
  - Weight Measurement: lbs (text input)
- Logo for Print:**
  - Upload a logo to be used on your Invoice. Logo MUST be 1"x1" in size. Bigger or Smaller could be distorted.
  - Browse for image: [Browse button]
  - Use ONLY jpg or bmp files. 300 dpi for best quality.
  - [Placeholder box for logo]
- Target Stock Level:**
  - Value: 2 (text input)
  - [Update Stock Level button]
  - NOTE: "Target Stock Level x Re-Order Alert level = Target Stock". Allows you to maintain safety stock levels and it gives system recommended quantities to order from Vendor.
- Default Settings:**
  - These settings apply to all your Customer Orders; Invoices and Returns.
  - Set Customer PO starting #: 20 (text input)
  - Set Vendor PO starting #: 18 (text input)
  - Set Invoice starting #: 5 (text input)
  - Set Customer RMA starting #: 1 (text input)
  - RMA (Return Merchandise Authorization)
  - Set Cust. Account Starting #: [text input]
  - Set Vend. Account Starting #: [text input]
  - Invoice Note: [text input]
  - Appears on bottom of Customer Invoice
  - Enforce Picking Location Inventory:
  - Direct Invoice:
  - Display Initial Qty:
  - Direct Bill:
  - Shipping is Taxable:
  - Show Combined Variants:
  - Check to view combined inventory of the Product's Variations. i.e. All Variations display as just one line item.
  - Show Back Order Items on Invoice:
  - Show Back Order Items on PPS slips:
  - Enable Customer Reserved Inventory:
  - Enable Admin Level Tax and Warehouse:
  - Enable Product Level Taxes:
- Buttons:** Save & Close, Save & Next, Close

4. For each product, AdvancePro allows you to set an order alert level. In this field, you can set a default target stock level that is a multiple of the order alert level. Then, AdvancePro will use this information to suggest re-order quantities. This information will appear on the Re-Order Alert Report and the Vendor Order.  
For example, if your order alert level for widgets is 300, and you set your target stock level value to 3, when re-ordering widgets, AdvancePro will suggest you order enough for a stock level of 900.
5. Manage your default settings.
  - 1) Set the customer PO starting number. All customer purchase orders created after this will go up incrementally from this number.
  - 2) Repeat step 1) for the vendor PO, invoice, customer RMA, customer and vendor account number settings (all listed below “Default Settings”).  
NOTE: You can repeat steps 1) and 2) at any time to reset or change the numbering systems.
  - 3) Enter a standard footnote that will appear at the bottom of all customer invoices
  - 4) Choose whether to enforce picking location inventory: If you use multiple picking locations, this feature will prompt you to select a picking location when shipping or receiving.
  - 5) When “Direct Invoice” is checked, AdvancePro will skip the warehouse processes of picking, packing and shipping. An invoice will be the direct result of processing a customer purchase order. This feature is useful for walk-ins and point of sale orders.
  - 6) With “Display Initial Quantity” checked, an additional quantity field is displayed on your invoice representing the customer’s initially requested quantity. You can use this for the back-order process and/or for reporting. Please note that if the stock is not fully available, you need to process the order using the warehouse, or you need to remove the quantity from the order.
  - 7) When “Direct Bill” is checked, AdvancePro will skip the warehouse processes of receiving. A bill will be the direct result of processing a vendor purchase order.
  - 8) Checking “Shipping is Taxable” allows you to tell AdvancePro to apply tax on shipping charges
  - 9) When “Show Combined Variants” is checked, AdvancePro will combine all of the variants of a single product onto a single line. If unchecked, AdvancePro will display a separate line for each variant (size, color, etc)
  - 10) Checking “Show Back Order Items on Invoice” will display additional lines on your invoices showing quantities of items that are on backorder.
  - 11) Checking “Show Back Order Items on PPS slips” will display additional lines on your picking, packing and shipping documents showing quantities of items that are on backorder.
  - 12) When “Enable Customer Reserved Inventory” is checked, if stock is not available for a customer order, and a vendor order is generated, this option will allow the inventory received from the vendor order to be reserved for the customer. This should only be used if everything you order is based on customer demand.
  - 13) When “Enable Admin Level Tax and Warehouse” is checked, you can assign a tax term to each individual warehouse. The warehouse from which an order is shipped will then determine the tax on the order. The warehouse and tax association is then made from the Site Administrator form. This feature is typically used in a multiple warehouse setup.
  - 14) The “Enable Product Level Taxes” feature is available in Canada only. It allows for taxes to be applied at the line item level.

## Additional Setting

In this screen, you can change a number of miscellaneous settings.

The screenshot shows the 'Site Settings' window with the 'Additional Setting' tab selected. The settings are organized into several sections:

- Display Default Notes on CPO:** Checkboxes for Admin, Customer, and Warehouse.
- Replicate Item SKU On Order:** Checkboxes for Customer and Vendor.
- Specify action on digits after decimal point:** Radio buttons for Round To (selected) and Truncate To, with a text input for 5 Decimal Points.
- Editable Product Name on Orders:** Checkboxes for Customer and Vendor.
- Display ETA Date for Product:** Checkboxes for VPO, W. VPO, and Bill.
- POS Customer:** A dropdown menu labeled 'Select Customer'.
- Third Party Warehouse Services:** Checkboxes for 'Allow import and export of Flat Files (CPO and Vendor Drop Ships only)' and 'Add Additional Shipping Surcharge'. Below this is a radio button for 'Use US Dollar Value' (selected) and a text input for '0'.
- Product SKU:** A text input for 'Length' with the value '50'.
- Editable Cross-Reference Labels For Customer Order, PPS and Invoice:** Two rows for Label1 and Label2, each with a text input and checkboxes for 'Cust. Ord', 'PPS', and 'Cust. Inv.'.
- Customer Payment Options:** Checkboxes for 'Set as Required: CVN', 'Cust. Name', and 'Cust. Address'.
- Costing Method:** Radio buttons for Product Cost (selected), Average Cost, FIFO, and LIFO.
- Other options:** A collection of checkboxes including 'Hide Product Cost Price (except Super Admin and Admin roles)', 'Do not display Item Kit Components on PPS slips', 'Display Unit of Measure On Cust. Order & Invoice', 'Restrict Payment Terms selection on CPO', 'Overwrite Customer Pricing from CPO', 'Display discount on Invoice and Order', 'No Reason for Customer Return', and 'Audit Price Changes'.

At the bottom of the window, there are three buttons: 'Save & Close', 'Save & Next', and 'Close'.

1. "Display Default Notes on CPO": When creating a customer order, you have the option of creating 3 types of notes:
  - 1) "Admin" notes are only seen by administrators and are not printed on the customer order. This note is set up on the Site Administrator form
  - 2) "Customer" notes are printed on customer orders and invoices.
  - 3) "Warehouse" notes are printed on picking, packing and shipping slips.
2. "Specify action on digits after decimal point" applies when processing customer purchase orders:
  - 1) "Round To" tells AdvancePro to round to the specified number of decimal points
  - 2) "Truncate To" tells AdvancePro to shorten prices to the specified number of decimal points

3. “Display ETA date for product”: If you wish to enter an ETA date on vendor orders for individual products (instead of the entire order), you can enable this option.
  - 1) Select “VPO” for vendor purchase orders
  - 2) Select “W-VPO” for warehouse vendor purchase orders
  - 3) Select “Bill” for vendor bills
4. “Replicate Item SKU On Order”: Enable this option to enter the same SKU on more than one product line. Otherwise, you can only have a SKU listed once on an order.
  - 1) Check “Vendor” to enable this option on Vendor purchase orders
  - 2) Check “Customer” to enable this option on Customer purchase orders
5. The “Editable Product Name on Orders” option allows you to edit the name of the product. This will not change the product information in AdvancePro but will only apply to the order, picking slips and invoices. The edited name then exports to QuickBooks.
  - 1) Check “Vendor” to enable this option on Vendor purchase orders
  - 2) Check “Customer” to enable this option on Customer purchase orders
6. “POS Customer”: For use with AdvancePro’s POS module. You can pre-create and pre-select a “walk-in” or “cash” customer to process POS orders. When you process a customer order using this customer, the order will be POS.
7. “Third Party Warehouse Services”: If you use a third party warehouse, select this to import flat files and to apply a shipping surcharge on customer orders.
8. “Product SKU”: Use this field to set the maximum number of characters in product SKUs. 50 is the system maximum.
9. “Editable Cross-Reference Labels on Customer Order, PPS and Invoice”: You can create up to 2 extra fields on customer orders that can be cross-referenced on the customer order, invoice, and picking, packing and shipping slips.
10. “Customer Payment Options”: Allows you to select what information your customers must provide when placing an online order.
11. “Costing Method”: Allows you to tell AdvancePro which method you would like to use to calculate your inventory cost
12. “Hide Product Cost Price (except Super Admin and Admin roles)”: This setting allows you to keep your cost prices hidden from all users of AdvancePro except for those with Super Admin or Admin permission levels.
13. “Do not display Item Kit Components on PPS slips”: Allows you to display only the item kit, without displaying it’s components on pick, pack and ship slips.
14. “Display Unit of Measure on Cust. Order & Invoice”: Checking this box results in units of measure being displayed on customer orders and invoices.
15. “Restrict Payment Terms selection on CPO”: When this box is checked, AdvancePro will use the pre-set payment terms for that particular customer. The option to change the payment terms will not be available.
16. “Overwrite Customer Pricing from CPO”: Checking this box enables the person entering an order to overwrite customer pricing from within the customer purchase order.
17. “Display discount on Invoice and Order” allows you to have the line item discount percentage and discount dollar amount displayed on customer orders and invoices.
18. “No Reason for Customer Return”: When this box is checked, AdvancePro allows you to process customer returns without entering a reason for the return. By default, a reason is required.
19. “Audit Price Changes”: When this setting is checked, AdvancePro requires you to enter a reason any time the price of a product is changes.

## Printing Settings

In this screen, we can customize printed documents that come out of AdvancePro.

The screenshot shows the 'Site Settings' window with the 'Printing Settings' tab selected. The window contains several sections for configuring printing options:

- Printing Options for Addresses & Company Info on Customer Orders & Invoice:** This section has three sub-sections: 'Print Company Info' (with checkboxes for 'On Customer Order', 'On Cust. WH. Order', and 'On Customer Invoice'), 'Print Billing Address' (with checkboxes for 'On Customer Order', 'On Customer Invoice', and 'Billing Name'), and 'Print Shipping Address' (with checkboxes for 'On Customer Order', 'On Cust. WH. Order', 'On Customer Invoice', and 'Shipping Name').
- Printing Options for Addresses on Vendor Orders & Bills:** Includes a checkbox for 'Print Address Billing Name'.
- Print Layouts For SmartPrintPro:** A button labeled 'Invoice'.
- Display & Print SKU on PPS:** A table with three rows ('Pick', 'Pack', 'Ship') and four columns of radio button options: 'Internal SKU', 'Internal SKU & Vendor SKU', and 'Internal SKU & Customer SKU'.
- Printing Options:** Radio buttons for 'Standard Edition', 'SmartPrint Pro', and 'Bakery Edition'.
- Print Shipping/Adjustment on Customer Order:** Checkboxes for 'Shipping On Customer Order', 'Adjustment On Customer Order', and 'Shipping on Cust. WH. Order'.
- Consolidate Invoices Settings:** A text field for 'Path to consolidate invoice location', a 'Starting #' field with '0', and a 'Prefix' field.
- Bottom Section:** Checkboxes for 'Print Tracking # On Invoice', 'Print balance due on Invoice', 'Print balance due on Order', and 'Print Tax Term Name on Printouts'.

At the bottom right, there are three buttons: 'Save & Close', 'Save & Next', and 'Close'.

1. "Printing Options for Addresses & Company Info on Customer Orders & Invoice" allows you to select the printed documents on which you would like your company info, billing address and shipping address to appear.
2. "Printing Options for Addresses on Vendor Orders & Bills" allows you to select whether you want your billing name printed on vendor orders and bills.

3. “Print Layouts for SmartPrint Pro” allows you to further customize your Invoice by renaming the listed fields when selecting the SmartPrint Pro option.

The screenshot shows a window titled "Invoice Layout Configurator" with three main sections: Header, Body, and Footer. Each section contains various fields with "Default" and "Rename to" labels, and checkboxes for "display".

**Header Section:**

- Invoice: [Default] [Rename to] [Text Box]
- Acc #: [Default] [Rename to] [Text Box]  display
- Payment Terms: [Default] [Rename to] [Text Box]  display
- Exp. Date: [Default] [Rename to] [Text Box]  display
- Carrier Acc #: [Default] [Rename to] [Text Box]  display
- Credit Memo: [Default] [Rename to] [Text Box]
- Sales Rep: [Default] [Rename to] [Text Box]  display
- Ship Date: [Default] [Rename to] [Text Box]  display
- Carrier: [Default] [Rename to] [Text Box]  display
- Logo:  display

**Body Section:**

- SKU #: [Default] [Rename to] [Text Box]
- Product: [Default] [Rename to] [Text Box]
- Weight: [Default] [Rename to] [Text Box]
- Qty: [Default] [Rename to] [Text Box]
- Profit Margin %: [Default] [Rename to] [Text Box]
- Total: [Default] [Rename to] [Text Box]
- Price WF: [Default] [Rename to] [Text Box]
- Price: [Default] [Rename to] [Text Box]

**Footer Section:**

- Sub Total: [Default] [Rename to] [Text Box]  display
- Shipping: [Default] [Rename to] [Text Box]  display
- Tax: [Default] [Rename to] [Text Box]  display
- Adjustment: [Default] [Rename to] [Text Box]  display
- GRAND TOTAL: [Default] [Rename to] [Text Box]

At the bottom, there are buttons for "Restore Default Setting", a checkbox for "Use Second Invoice Layout", and "Save" and "Close" buttons.

4. “Display & Print SKU on PPS” allows you to specify which SKUs you would like to appear on your picking, packing and shipping documents.
5. “Printing Options” allows you to select from three printing template styles: Standard Edition, SmartPrint Pro, and Bakery Edition. Each template shows slightly different information for CPO, PPS and invoice printouts. The SmartPrint Pro template looks like the Standard edition, but it may have some additional info and it will re-size columns and fonts to best suit your paper selection. This button is available on all printouts.
6. “Print Shipping/Adjustment on Customer Order” allows you to select further printing options.
7. “Consolidate Invoices Settings” allows you to specify where you would like your consolidated invoices to be saved in a PDF format. It also allows you to specify your starting invoice number and attach a prefix to your consolidated invoice numbers.
8. “Print Tracking # On Invoice” allows you to have your tracking number printed on invoices.
9. “Print balance due on Invoice” will print the balance owing on invoices.
10. “Print balance due on Order” will print the balance owing on the customer order.
11. “Print Tax Term Name on Printouts” allows you to have the name of your tax, such as “State Tax” on printouts.



## Site Wide Settings

The screenshot shows a software window titled "Site Settings" with a standard Windows-style title bar (minimize, maximize, close). Below the title bar is a navigation menu with several tabs: "Company Information", "General Settings", "Additional Setting", "Printing Settings", "Site Wide Settings" (which is currently selected), "My WorkSpace", "Additional Favorite Links", "QuickBooks", "Custom Fields", "Custom Fields 2", "UOM Settings", and "Email Setting".

The main content area is divided into four sections:

- Taxable Products:** A section with a sub-header "Taxable Products" and a note: "Mark or Unmark all Products as Taxable. This will overwrite individual Product settings." Below this note are two buttons: "Mark All Products For Tax" and "Unmark All Products For Tax".
- B2B Products:** A section with a sub-header "B2B Products" and a note: "NOTE: For web use only. Mark or Unmark all Products as B2B enabled. This will overwrite individual Product settings." Below this note are two buttons: "Mark All B2B" and "Unmark All Products B2B".
- B2C Products:** A section with a sub-header "B2C Products" and a note: "NOTE: For web use only. Mark or Unmark all Products as B2C enabled. This will overwrite individual Product settings." Below this note are two buttons: "Mark All B2C" and "Unmark All Products B2C".
- System Wide Weight Changes:** A section with a sub-header "System Wide Weight Changes" and a note: "NOTE: For Item Kits only. Recalculate Item Kit weight using combined components weight." Below this note are two buttons: "Use Component Weight" and "Set Weight". To the right of the "Set Weight" button is a text input field labeled "Value" with the text "Affects all products." above it.

At the bottom right of the window, there are two buttons: "Next" and "Close".

1. "Taxable Products": These settings override individual product tax settings.
2. "B2B Products": Using these check-boxes, you can enable or disable all products to be available for your B2B site
3. "B2C Products": Using these check-boxes, you can enable or disable all products to be available for your B2C site
4. "System Wide Weight Changes": For item kits, you can assign a weight when creating the kit. Click Use Component Weight to calculate the kit weight based on the component weights instead. Also, you can assign a default weight to all your products in the "Value" text box by clicking Set Weight

## My Workspace

When you log into *AdvancePro*, you will notice that your Workspace shows your 5 favorite links. You can set those links here for quick access to your favorite sites.

The screenshot shows a web browser window titled "Site Settings". The window has a navigation bar with several tabs: "Company Information", "General Settings", "Additional Setting", "Printing Settings", "Site Wide Settings", "My WorkSpace", "Additional Favorite Links", "QuickBooks", "Custom Fields", "Custom Fields 2", "UOM Settings", and "Email Setting". The "My WorkSpace" tab is currently selected. Below the navigation bar, there is a section titled "Customize your WorkSpace Page." with a sub-heading "My Favorite Links". This section contains five rows of input fields for "Hyperlink 1" through "Hyperlink 5" and "Caption 1" through "Caption 5". The first row is pre-filled with "www.AdvanceWare.net" and "AdvanceWare". Above the first hyperlink field, there is a URL "http://www.mylink.com" and above the first caption field, there is a text "i.e. Check Today's News!". At the bottom right of the window, there are three buttons: "Save & Close", "Save & Next", and "Close".

Hyperlink	Hyperlink	Caption	Caption
Hyperlink 1	<input type="text" value="www.AdvanceWare.net"/>	Caption 1	<input type="text" value="AdvanceWare"/>
Hyperlink 2	<input type="text"/>	Caption 2	<input type="text"/>
Hyperlink 3	<input type="text"/>	Caption 3	<input type="text"/>
Hyperlink 4	<input type="text"/>	Caption 4	<input type="text"/>
Hyperlink 5	<input type="text"/>	Caption 5	<input type="text"/>

http://www.mylink.com

i.e. Check Today's News!

Save & Close Save & Next Close

## Additional Favorite Links

This screen allows you to specify additional links for quick access to your favorite sites.

The screenshot shows a software window titled "Site Settings" with several tabs. The "Additional Favorite Links" tab is active. Below the tabs, there is a section titled "My Favorite Links" containing a table with 20 rows. Each row has two input fields: "Hyperlink" and "Caption". The first row is pre-filled with the URL "http://www.mylink.com" and the text "i.e. Check Today's News!". At the bottom of the window, there are three buttons: "Save Close", "Save & Next", and "Close".

Hyperlink	Caption
http://www.mylink.com	i.e. Check Today's News!
Hyperlink 6	Caption 6
Hyperlink 7	Caption 7
Hyperlink 8	Caption 8
Hyperlink 9	Caption 9
Hyperlink 10	Caption 10
Hyperlink 11	Caption 11
Hyperlink 12	Caption 12
Hyperlink 13	Caption 13
Hyperlink 14	Caption 14
Hyperlink 15	Caption 15
Hyperlink 16	Caption 16
Hyperlink 17	Caption 17
Hyperlink 18	Caption 18
Hyperlink 19	Caption 19
Hyperlink 20	Caption 20

## QuickBooks

**Site Settings**

Company Information | General Settings | Additional Setting | Printing Settings | Site Wide Settings

My WorkSpace | Additional Favorite Links | **QuickBooks** | Custom Fields | Custom Fields 2 | UOM Settings

Email Setting

Set AdvancePro to recognize if you are a QuickBooks user or not.  
Use the QuickBooks module for your synchronization settings and exporting.

**QuickBooks**

Are you a QuickBooks user? ?

Re-Enable QuickBooks Import? ?

Enable QuickBooks Classes

Do you want AdvancePro to Query your Invoices in QuickBooks? ?

Do you want to Export only Active Items to QuickBooks? ?

My Version of QuickBooks does NOT support Item Assemblies ?

Export Customer Account Number to QB as Customer Name

Automatically adjust QB Inventory when manual Adjustments are made in AdvancePro ?

**QB Version**  
What type of QuickBooks are you using?  
 Desktop  Online

What version of QuickBooks are you using?  
 USA  Canadian  Australian  UK  Others

This option will reset all previously exported data in the AdvancePro database for Re-Export to QuickBooks.

**Re-Export ALL to QuickBooks** | Re-Export Default Items | Re-Link All Failed Exports

WARNING: Re-Exporting all data to an existing QuickBooks company file will result in duplicate records in QuickBooks.

Mark all Products for QB Re-Export	Mark all Products as Exportable	Mark all Products as NOT Exportable
Mark All Customers for QB Re-Export	Mark All Customers as Exportable	Mark All Customers as NOT Exportable
Mark All Vendors for QB Re-Export	Mark All Vendors as Exportable	Mark All Vendors as NOT Exportable
Mark All Inventory for QB Re-Export	Mark All Sales Rep as Exportable	Mark All Inventory as already Exported

Save & Close | Save & Next | Close

1. "Are You a QuickBooks User?": This should be set to yes, and use the options on the right to indicate which version you use.  
NOTE: Switching versions of QuickBooks will delete the *AdvancePro* database. If you need to change versions, be sure to back up the database first.
2. "Re-Enable QuickBooks Import": We do not recommend enabling this option, as you may duplicate important information. Enable this if you want to re-import the data.
3. "Enable QuickBooks Classes": If you use classes in QuickBooks, you can import them into AdvancePro and associate the same references onto invoices and bills. Then, when you export to QuickBooks, this will help you run reports using classes. Classes can be associated with customer and vendor accounts too.
4. "Do you want AdvancePro to query your invoices in QuickBooks?": If you accept payments in QuickBooks, enable this option. During export, *AdvancePro* will look for the payments and apply them to the *AdvancePro* invoices.

5. “Do you want to export only active items to QuickBooks?”: This will export only items that are actually used on invoices or bills. Use this option if you are approaching QuickBooks maximum number of SKUs (at least 14,000).
6. “My version of QuickBooks does not support item assemblies”:
7. “Export Customer Account number to QuickBooks as Customer Name”:
8. “Automatically adjust QuickBooks inventory when manual adjustments are made in AdvancePro”:
9. Export options:

## Custom Fields

The screenshot shows the 'Site Settings' window with the 'Custom Fields' tab selected. The window is divided into several sections for configuring custom fields:

- Custom Fields for Products:** This section contains 7 fields. Custom Field 1 is named 'DUTY'. Custom Field 2 is named 'Categories'. Below each field name are checkboxes for 'Display On:' with options: 'Cust. Invoice', 'W: Cust. Ord', 'Vend. Ord', 'Vend. Bill', and 'Cust. Order'. For Custom Field 1, 'Vend. Bill' is checked. A note states: 'The following Custom Fields are for internal use only and will only display when you are editing a Product.' Custom Fields 4, 5, and 6 are currently empty.
- Custom Fields for Customers:** This section contains 6 empty fields for configuration.
- Custom Fields for Vendors:** This section contains 3 empty fields for configuration.
- Custom Fields for Customer Order:** This section contains 3 fields. Each field has checkboxes for 'Display On:' with options: 'Cust. Invoice', 'W: Cust. Ord', and 'Cust. Order'.

At the bottom of the window are three buttons: 'Save & Close', 'Save & Next', and 'Close'.

1. There are 6 custom fields for products, 3 of which are internal and will only appear on the edit product / product info forms. For the other 3, you can set where you would like them to appear and print.
2. There are 6 custom fields for customers
3. There are 3 custom fields for vendors

There are 3 custom fields for customer orders. You can set where you would like these fields to appear and print. Then, on the CPO, you can enter the custom field info

## Custom Fields 2

1. There are 3 editable custom field for products that will appear on your choice of: customer order, PPS slips, and/or invoices.

The screenshot shows a software window titled "Site Settings" with several tabs. The "Custom Fields 2" tab is active. Below the tabs, there is a section titled "Editable Custom Field For Customer Order, PPS and Invoice". This section contains three rows, each with a text input field for a custom field name and a "Display On:" label followed by three checkboxes: "Cust. Ord.", "PPS", and "Cust. Inv.". At the bottom right of the window, there are three buttons: "Save & Close", "Save & Close", and "Close".

Field Name	Cust. Ord.	PPS	Cust. Inv.
Custom Field 1: <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field 2: <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Field 3: <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## UOM Settings

AdvancePro comes equipped to handle the needs of companies that purchase and sell products in multiple units of measure.

1. Access the “UOM Settings” tab to set units of measure (UOM). We recommend that you start by setting the column header for the lowest unit of measure (for “each” item) and then for the higher ones (for example, a carton).
2. Under “Display Advanced UOM Details”, you can choose where you would like the UOM details to display (on the vendor bill, on customer orders and invoices, and/or on customer orders in the warehouse).
3. You can also set a customer surcharge for advanced units of measure in the “Reset Customer Pricing Surcharge %” text box.



- 4. Click “Enable Block Setup” to have AdvancePro suggest corresponding units to create a uniform block. This is useful industry types such as Lumber where system recommended quantities ensure equitable distribution of goods by a % during order entry. These units and their distribution are automatically generated by AdvancePro.

## Email Setting

In this screen, AdvancePro’s email defaults can be set.

The screenshot shows the 'Site Settings' dialog box with the 'Email Setting' tab selected. The dialog has a title bar with standard window controls. Below the title bar are several tabs: 'Company Information', 'General Settings', 'Additional Setting', 'Printing Settings', 'Site Wide Settings', 'My WorkSpace', 'Additional Favorite Links', 'QuickBooks', 'Custom Fields', 'Custom Fields 2', and 'UOM Settings'. The 'Email Setting' tab is active and contains the following sections:

- Email Option**:
  - Customer Order Related Printouts**: File type (dropdown menu set to .pdf), Default subject (text box), and Default message (text area).
  - Vendor Order Related Printouts**: File type (dropdown menu set to .pdf), Default subject (text box), and Default message (text area).
  - BCC Email**: A text box for entering a BCC email address.
- SMTP Settings**:
  - SMTP Server Name (text box)
  - Instruction: "If this server requires authentication please provide username and password below otherwise leave it blank"
  - Username (text box, Maximum 256 characters)
  - Password (text box, Maximum 256 characters)
  - Port (text box, value 0)
  - Test connection button
  - Test SMTP connection button
  - Checkboxes:  Allow Pickers Email Alert,  Allow Sales Rep Email Alert

At the bottom right of the dialog are 'Save' and 'Close' buttons.

1. By default, customer order and vendor order attachments in AdvancePro are PDF, but you can choose to send the orders as .xls files.
2. AdvancePro allows you to set a BCC address as well. This is useful if you would like to save a copy of the emails you send from AdvancePro.
3. If you wish to alert pickers or sales reps of orders by email (using the check-boxes at the bottom of this dialog), you must set up the SMTP settings. If you do not want to enable these alerts, then you do not need to set up SMTP

settings. The sales rep alerts are sent out whenever a CPO is placed or edited for a customer assigned to that sales rep.

4. For further help, [visit the knowledge base](#).