

Company Settings (enter-edit)


This article describes how to Enter or Edit Company Settings OR what KAT procedure to use to Enter or Edit

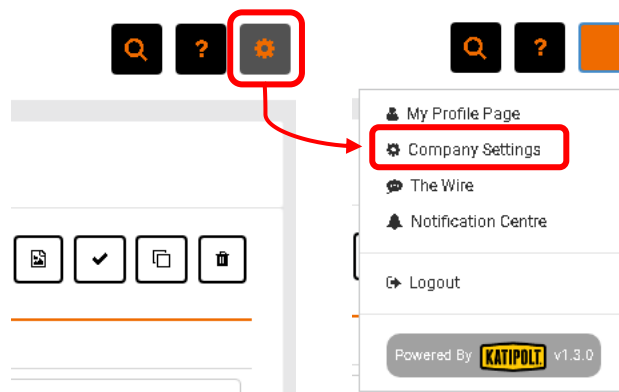
To Enter or Edit Company Settings;

Entering or Editing Company Settings is done from the Company Settings Window AND/OR the Company Settings Edit Window

Quick Flow;

User Profile > Company Settings AND/OR > [Edit]

1. Press on the **Settings** button  to display the Options Menu, then Press on the **Company Settings** option to display the Company Settings Window



2. If needed, Press on the Company Settings Window's **[Edit]** button  to access the Company Settings Edit Window





Subnav	Editing From	Procedure
STAFF	Subnav	KAT-1901
CUSTOMER DEFAULTS	Edit Window	KAT-0206, KAT-0308
FINANCE SETTINGS	Edit Window	KAT-0606
DOCUMENT AND EMAIL WORDING	Subnav & Edit Window	KAT-0402
DEFAULT PAYMENT TERMS	Edit Window	KAT-1610
DEFAULT INCLUSIONS AND EXCLUSIONS	Edit Window	KAT-0902
COMPANY HEADER AND FOOTER	Edit Window	KAT-0304
PARTNER CONNECTED APPS	Subnav	KAT-1602, KAT-1604
PRINT PREVIEW SETTINGS	Edit Window	KAT-1612
COMPANY FILES	Edit Window	KAT-0306
CUSTOMISED KITSET PRICING	Subnav	
TIMESHEET CODES	Subnav & Edit Window	KAT-2006
VISBUILD SETTINGS	Edit Window	
XERO LEDGER ACCOUNTS	Subnav	
PRICING RULES	Subnav	KAT-1616

To Enter or Edit Company Settings (from Company Settings Window's Subnav View);

Entering or Editing Company Settings is done from the Company Settings Window.


Quick Flow;**Company Settings > Work through Subnav's**

1. From the **Company Settings** Window **Work through Subnav's**, Pressing on them to expand to allow data Entry/Editing
 - STAFF – See KAT-1901
 - DOCUMENT AND EMAIL WORDING – See KAT-0402
 - CUSTOMISED KITSET PRICING
 - TIMESHEET CODES - See KAT-2006
 - XERO LEDGER ACCOUNTS
 - PRICING RULES – See KAT-1616
2. When finished Entering/Editing the data, Press the Subnav's **[Save]** button  to save entries, then Press the Company Settings Window's **[Save]** button  to save entries

To Enter or Edit Company Settings (from Company Settings Edit Window's Subnav View);

Entering or Editing Company Settings is done from the Company Settings Edit Window

Quick Flow;**Company Settings > Edit > Company General Details > Work through Subnav's**

1. From the **Company Settings** Window, Press on the **[Edit]** button  to display the Company Settings Edit Window

 COMPANY SETTINGS ▾ TEST ELECTRICAL





2. Enter **Company General Details**

- Account Name
- Trading As
- Account Email
- Account Phone
- Account Mobile
- Account Fax
- Website
- Postal Address
- Physical Address

NOTE: The Company Shortcode will add to a User's (Staff Member's) email address to give them their unique Username

3. **Work through Subnavs**, Pressing on them to expand to allow data Entry/Editing

- CUSTOMER DEFAULTS - See KAT-0206 and KAT-0308
- FINANCE SETTINGS – See KAT-0606
- DOCUMENT AND EMAIL WORDING – See KAT-0402
- DEFAULT PAYMENT TERMS – See KAT-1610
- DEFAULT INCLUSIONS AND EXCLUSIONS – See KAT-0902
- COMPANY HEADER AND FOOTER – See KAT-0304
- PARTNER CONNECTED APPS – See KAT-1602 and KAT-1604
- PRINT PREVIEW SETTINGS - See KAT-1612
- COMPANY FILES – See KAT-0306
- TIMESHEET CODES – See KAT-2006
- VISBUILD SETTINGS

4. When finished Entering/Editing the data, Press the Subnav's **[Save]** button  to save entries, then Press the Company Settings Edit Window's **[Save]** button  to save entries