Customer Defaults

This article describes how to set up the Customer Defaults, including Default Brand. The Default Brand at Company Settings will populate as the Default Brand when creating a new Contact (Customer). The default Brand can be over-ridden and set at the CONTACTS (Customer) Window.
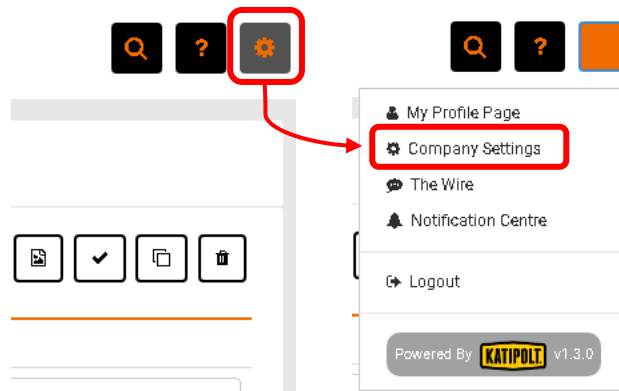
To Set Up Customer Defaults;

Setting Up Customer Defaults is done from the CUSTOMER DEFAULTS Subnav of the Company Settings Editing Window.

Quick Flow;

Company Settings > **[Edit]** > **CUSTOMER DEFAULTS** Sub Nav> **Default Brand** > **Start Number for New Contacts** > **Start Number for New Works** > **[Save]**

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

3. Scroll down and Press on the **CUSTOMER DEFAULTS** Subnav to expand

4. From the CUSTOMER DEFAULTS Subnav, Select a **Default Brand**, a number for **Start Number for New Contacts** and a number for **Start Number for New Works**

Temporary Procedural Step: Set the "Start Number of New Works" to 1000 numbers after the last SystemFox Quote/Job Number

5. When finished Selecting/Entering the data, Press the CUSTOMER DEFAULTS Subnav's **[Save]** button ⬚ to save entries, then Press the Company Settings Edit Window's **[Save]** button ⬚ to save entries