How to Set the Default Fields
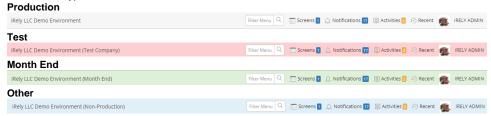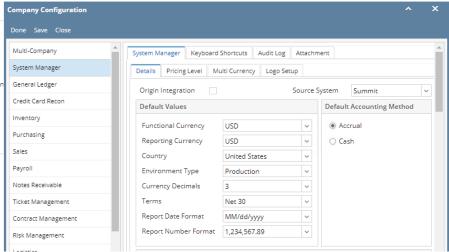
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** menu then click **Company Configuration**
3. On **System Manager** panel, type the currency or select a value on the **Functional Currency** and **Reporting Currency** combo boxes
4. Type the country on the **Country** combo box or select from the list
5. Select an **Environment Type** to change the header color depending in the environment of app
   a. Environment type colors:
      Production

      | iRely LLC Demo Environment | Filter Menu | Screens 1 | Notifications 17 | Activities 2 | Recent | IRELY ADMIN |

      Test

      | iRely LLC Demo Environment (Test Company) | Filter Menu | Screens 1 | Notifications 17 | Activities 2 | Recent | IRELY ADMIN |

      Month End

      | iRely LLC Demo Environment (Month End) | Filter Menu | Screens 1 | Notifications 17 | Activities 2 | Recent | IRELY ADMIN |

      Other

      | iRely LLC Demo Environment (Non-Production) | Filter Menu | Screens 1 | Notifications 17 | Activities 2 | Recent | IRELY ADMIN |

6. Select a **Currency Decimals** from **0 - 6**. This will configure all decimals in the system. If the currency decimal value is 4 then all screen will show up to 4 decimals, unless this setup is overridden.
7. Select a default **Terms**, this will be the default term for vendor entities created from a different entity.
8. Select the **Report Date Format**, all dates in the report viewer/screen will show on the selected format, unless overridden
   a. MM/dd/yyyy - this is the default value
   b. M/d/yyyy
   c. M/d/yy
   d. MM/dd/yy
   e. yy/MM/dd
   f. yyyy/MM/dd
   g. dd/MM/yyyy
9. Select the **Report Number Format**, all numbers in the report viewer/screen will show on the selected format, unless overridden
   a. 1,234,567.89 - this is the default value
   b. 1.234.567,89
10. Click **Save** button to implement the setup
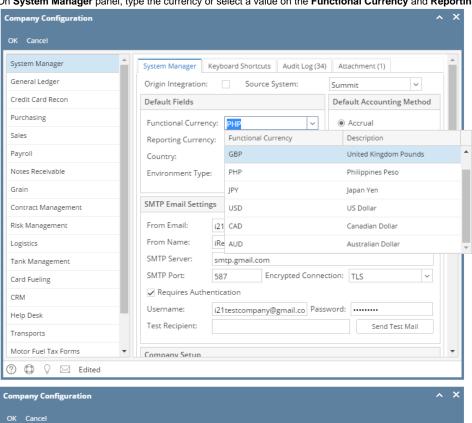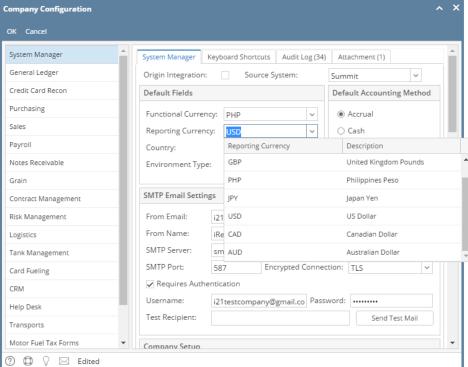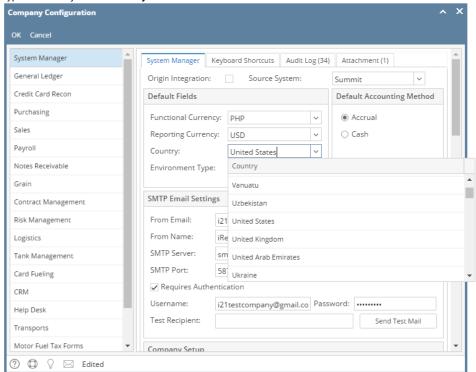11. Or click the **Done** button to save and close the screen

ⓘ Saved currency and country will be used as defaults on all modules.

1. Log in as **Admin user**
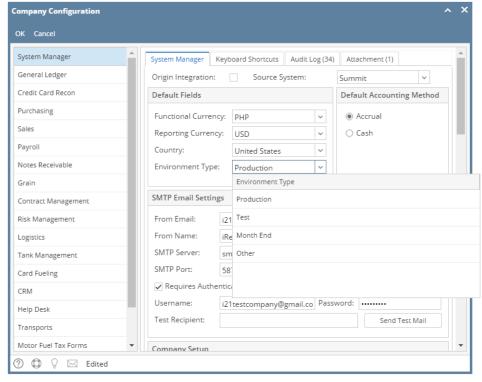2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. On **System Manager** panel, type the currency or select a value on the **Functional Currency** and **Reporting Currency** combo boxes

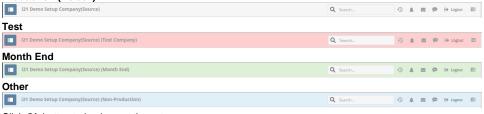4. Type the country on the **Country** combo box or select from the list

5. Select an **Environment Type** to change the header color depending in the environment of app

Environment type colors:
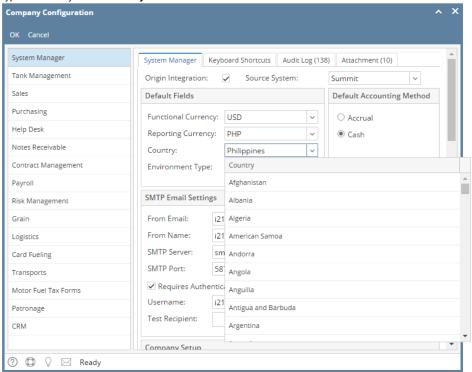**Production (**Default**)**

Test

Month End

Other

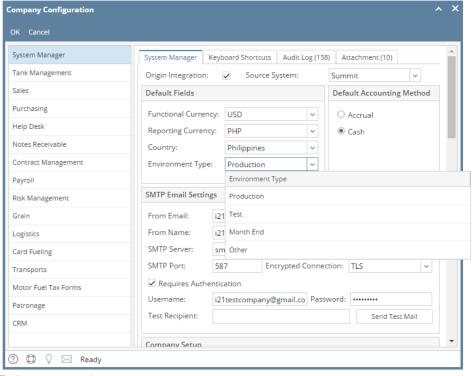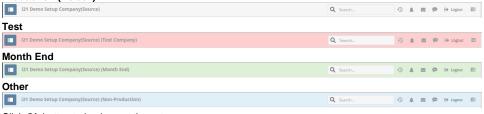6. Click **Ok** button to implement the setup

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5. Select an **Environment Type** to change the header color depending in the environment of app
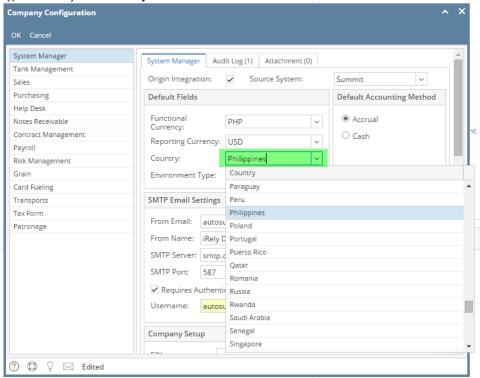

Environment type colors:
Production (Default**)**

Test

Month End

Other

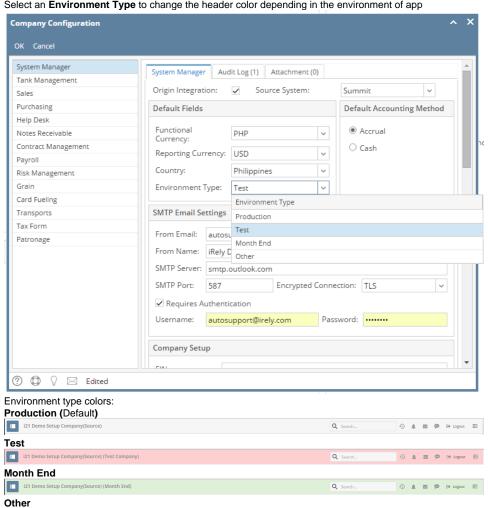6. Click **Ok** button to implement the setup

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2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
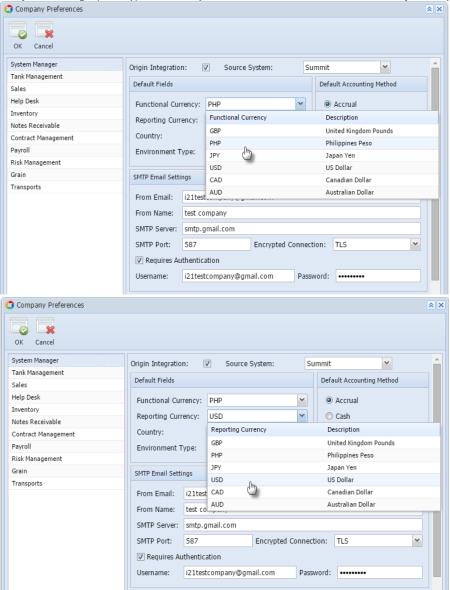3. On **System Manager** panel, type the currency or select a value on the **Functional Currency** and **Reporting Currency** combo boxes

4. Type the country on the **Country** combo box or select from the list

5. Select an **Environment Type** to change the header color depending in the environment of app

Environment type colors:
Production (Default**)**

Test

Month End

Other

6. Click **Ok** button to implement the setup

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Preferences**
3. On **System Manager** panel, type the currency or select a value on the **Functional Currency and Reporting Currency** combo boxes

4. Type the country on the **Country** combo box or select from the list

5. Select an **Environment Type** to change the header color depending in the environment of app

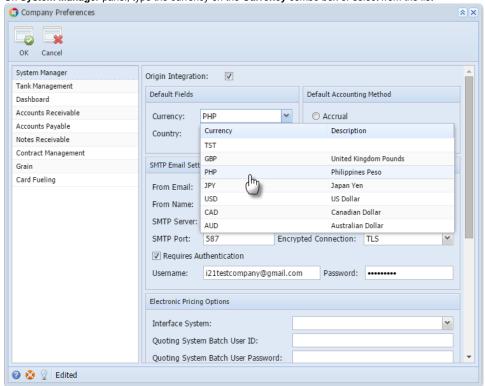Environment type colors:
Production

Test

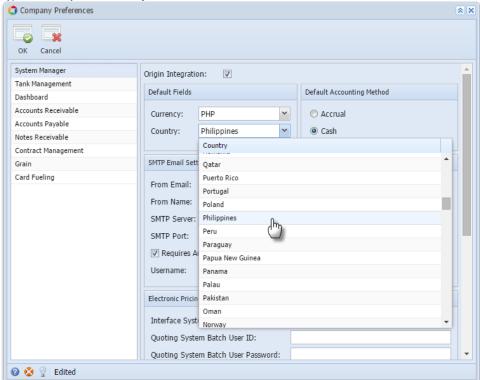**Month End**

Other

6. Click **Ok** toolbar button to implement the setup

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Preferences**

3. On **System Manager** panel, type the currency on the **Currency** combo box or select from the list
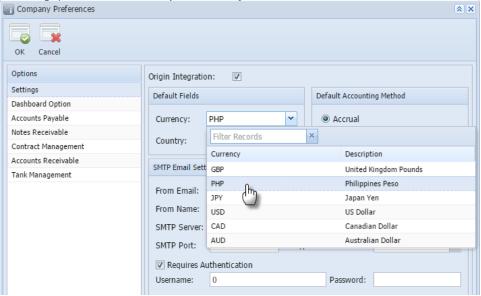

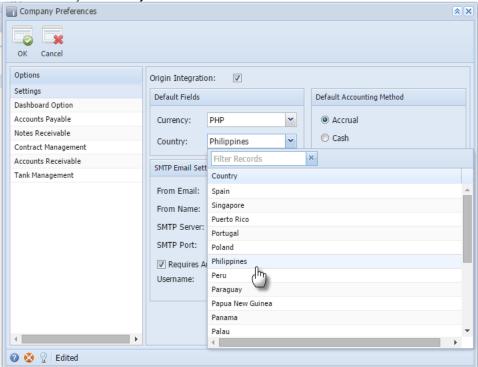4. Type the country on the **Country** combo box or select from the list

5. Click **Ok** toolbar button to save the setup

1. From **Admin** folder, double click **Company Preferences**

2. On **Settings** panel, select the Currency from **Currency** combo box

3. Select the Country from **Country** combo box

4. Click **Ok** toolbar button to save the setup