## **HOW TO SET UP USER PREFERENCES**

You can set specific preferences for your user that will allow you to customize many parts of the Agility system to address your specific needs. User preferences are unique for each individual login.

Accessing User Preferences: From the Main Menu you will click on "File" in the upper left-hand corner:



This will open a menu that looks like the following: Click on User Preferences

File						
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This will open the User Preferences window. From here, you can set specific defaults for your user. For complete information on all the settings you can access Agility Online Help <u>here</u>:

You can also see article <u>AR1156 – Common User Preferences</u> that has some more common User Preferences and how to set them up.

We will discuss how to set a couple of the more popular preferences.

## Setting the default for Sales Order Locator searches

When using the Sales Order Locator you may have a definite way you want to search each time. Do this by accessing the Sales tab of User Preferences and choosing from the options:

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Click on the drop-down, choose the desired default and then click Save. This will save your preference.

## Setting the default Item Locator search

## From the User Preferences window choose the Inventory/Stock Status tab:

todk Status       Item Locator         Default cost UOM       Costing       Default search by (Purchasing)          Default additional item info to display       Ext description       Default search by       Keyword search          Default additional item info to display       Ext description       Default search by       Keyword search          Default sigle dimension       Display items with available quantity only (Stock Status)       Display items with available quantity only (Quote Entry)         Default for Display branches       All for item       Display items with on hand quantity only (Quote Entry)         Default to display branches with available quantity only       Default to display items with on hand quantity only (Quote Entry)         Default to display branches with available quantity only       Default to display items with on hand quantity only         Default to display branches with on hand quantity only       Default to display extended description         Default for Price and Misc Cost Info       Specific pricing         Default to Indude attribute items       Item Attribute Search         Item Attribute Search       Indude attribute types of         BOM and Item       Stocking         Sort order of B(0 information       Expect date (descending)         Sort order of B(0 information       Expect date (descending)         Check for keywo	les	Purchasing/Dispatch Inventory/St	ock Status Mobile Processing Pic	king Preferen	ices Misc Accounting			
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On this screen you can set the Default Item Locator Search by to your desired search. Any of the available searches can be chosen. For our example we will choose Keyword Search.

Click on the drop-down, highlight the desired search option and then click OK. This will close the screen and set your default search option for all item locator searches to Keyword Search: