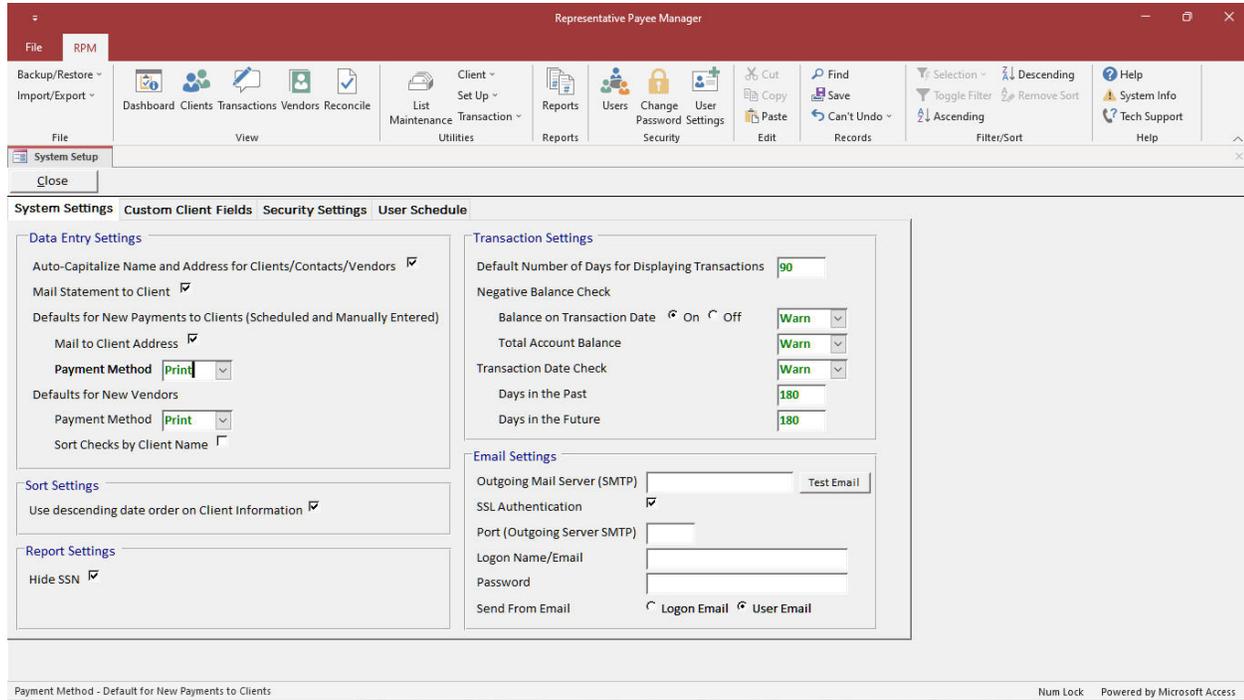


## System Setup

Select *System Setup* from the *Utilities, Set Up* menu to open this screen. This is used to set default options in RPM. The settings on this screen apply to all RPM users.

### System Settings Tab



Fields on the *System Settings* tab are explained below.

### Data Entry Settings

- **Auto-Capitalize Name and Address for Clients/Contacts/Vendors** - check this option if you want the first letter of each word in a name or address automatically capitalized. For example, if you enter 123 first street, it will automatically be changed to 123 First Street.
- **Mail Statement to Client** - check if you want to mail the *Client Statement (Window Envelope)* report to each client's mailing address. You can still turn the option on or off for each individual client.
- **Defaults for New Payments to Clients**
  - **Mail to Client Address** - check this option if you want checks paid to clients to automatically include the client's address on the check by default. You can still turn the option on or off for each individual transaction.
  - **Payment Method** - select the default payment method to use when entering payments to clients. You can see details for the available payment methods in the [Payment Methods](#) topic.
- **Defaults for New Vendors**
  - **Payment Method** - select the default payment method to use when entering new vendors. You can see details for the available payment methods in the [Payment Methods](#) topic.
  - **Sort Checks by Client Name** - check this option to have checks paid to vendors automatically sort by the client's name instead of the vendor name by default. This option can be turned on or off for each vendor. The setting entered here will be the default for new vendors.

### Sort Settings

- **Use descending date order on Client Information** - check this option if you want the most recently dated records to show at the top of each list on the [Clients](#) screen. This includes *Housing, Events, Case Notes, Test Scores* and *Assets*.

### Report Settings

- **Hide SSN** - check this option if you would like reports to default to hiding the client's social security number. You can still turn the option on or off for individual reports.

### Transaction Settings

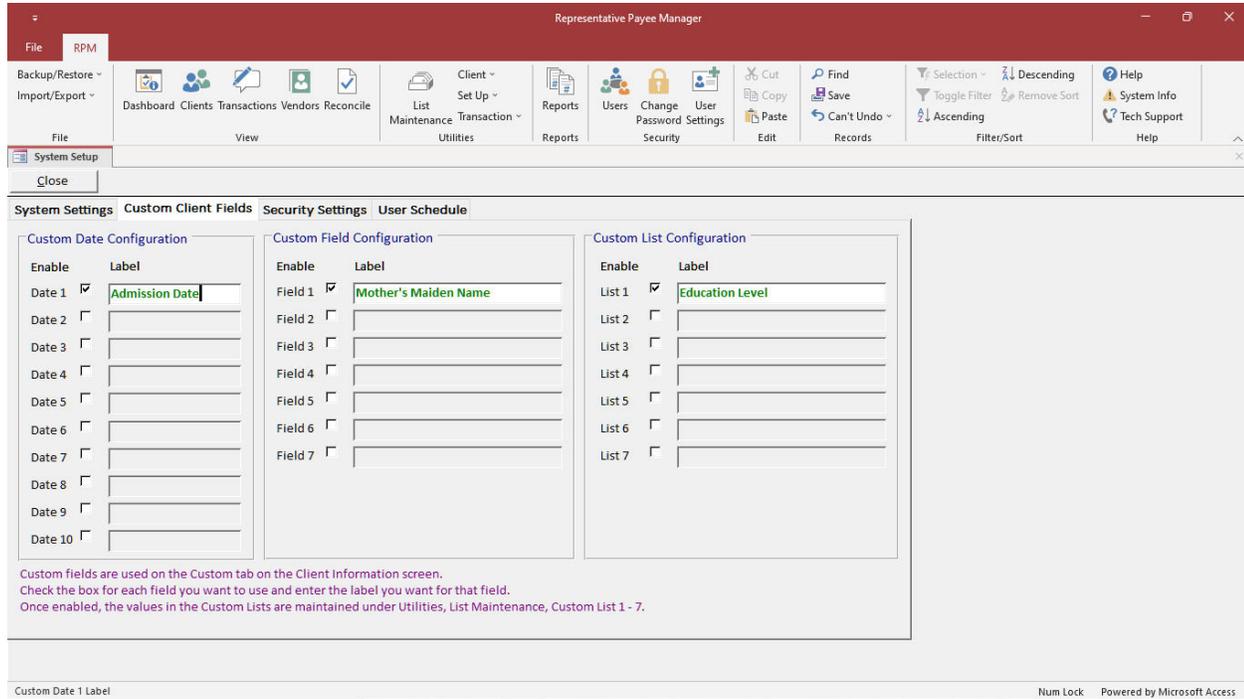
- **Default Number of Days for Displaying Transactions** - enter the number of days you want to display transactions on the [Transactions](#) screen. The screen will default to only show transactions up to this number of days old when opened. If you have a large mass account, using a lower default number of days will allow the [Transactions](#) screen to open faster.
- **Negative Balance Check**
  - **Balance on Transaction Date** - select the option to *Warn* or *Prevent* negative balances based on the **client's account balance on the date of a transaction**. Select *Warn* to display a warning message when transactions are being entered that would cause a client to have a negative balance. Select *Prevent* to stop transactions from being entered that would cause a client to have a negative balance. If this option is turned off, only the *Total Account Balance* will be checked.
  - **Total Account Balance** - select the option to *Warn* or *Prevent* negative balances based on the **client's total account balance**. Select *Warn* to display a warning message when transactions are being entered that would cause a client to have a negative balance. Select *Prevent* to stop transactions from being entered that would cause a client to have a negative balance.
- **Transaction Date Check** - select the option to *Warn* or *Prevent* for transaction dates outside of the selected past/future date range. Select *Warn* to display a warning message and select *Prevent* to stop transactions outside of the selected past/future date range. Enter the number of days to check for *Days in the Past* and *Days in the Future*. Any transaction dates entered outside of this range will display a warning message or be prevented from being entered based on your settings.

### Email Settings

The email settings are used for sending reports to yourself, vendors and clients. You may need to get this information from your IT department or from your internet provider. Click *Test Email* to test your email settings. Each user can enter their own email address on the [User Settings](#) screen.

- **Outgoing Mail Server (SMTP)** - the host name for your outgoing email.
- **SSL Authentication** - check this option if your outgoing mail server requires authentication and fill in the remaining fields below.
- **Port (Outgoing Server SMTP)** - enter the port for your outgoing mail server.
- **Logon Name/Email** - enter the login name for your outgoing mail server.
- **Password** - enter the password for your outgoing mail server.
- **Send From Email** - select *Logon Email* to send all emails from the *Logon Email* entered on this screen. This may be required if you are using a relay account for sending emails. Emails sent from the Logon Email can be CC'd to the user's email. Select *User Email* to send all emails from the email address for each user entered on the [User Settings](#) screen.

### Custom Client Fields Tab



Custom fields are used on the *Custom* tab on the [Clients](#) screen. Fields on the *Custom Client Fields* tab are explained below.

Check the box for each field you want to use and enter the label you want for that field.

- **Custom Dates** - configure up to 10 custom dates.
- **Custom Fields** - configure up to 7 custom fields.
- **Custom Lists** - configure up to 7 custom lists. The values in the *Custom Lists* are maintained on [List Maintenance](#), *Custom List 1 - 7*.

## Security Settings Tab

System Settings Custom Client Fields **Security Settings** User Schedule

**Password Requirements**

Require Passwords	<input checked="" type="checkbox"/>
Maximum Days Password Age	90
Minimum Password Length	6
Alpha Required	<input type="checkbox"/>
Uppercase Alpha Required	<input type="checkbox"/>
Number Required	<input type="checkbox"/>
Special Character Required	<input type="checkbox"/>

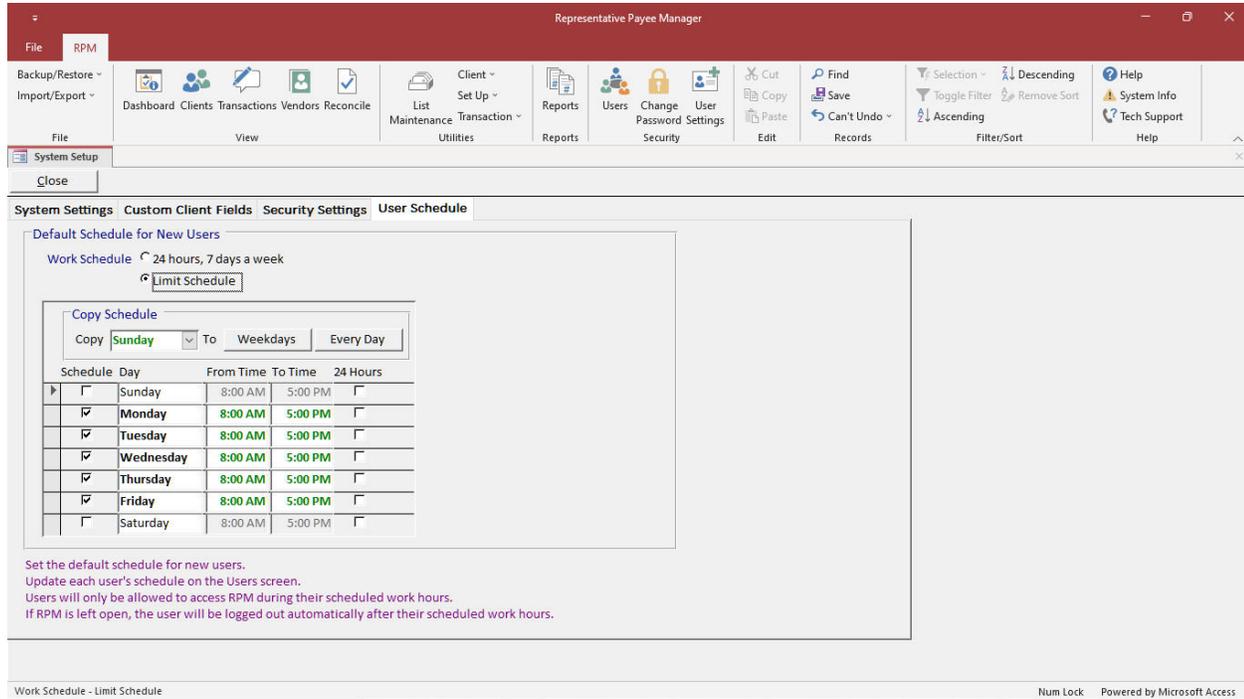
- **Require Passwords** - check this box if users are required to have passwords.
- **Maximum Days Password Age** - enter the frequency with which users are required to change passwords. Enter 0 if passwords do not need to be changed.
- **Minimum Password Length** - enter a minimum password length from 1 - 20.
- **Alpha Required** - check this box if each password must include an alpha character (upper or lower case letter a-z).
- **Uppercase Alpha Required** - check this box if each password must include an uppercase alpha character (upper case letter A-Z).
- **Number Required** - check this box if each password must include a number (0-9).
- **Special Character Required** - check this box if each password must include a special character (examples include: !@#\$%)

Require Passwords Num Lock Powered by Microsoft Access

Fields on the *Security Settings* tab are explained below.

- **Require Passwords** - check if users are required to have passwords.
- **Maximum Days Password Age** - enter the frequency with which users are required to change passwords. Enter 0 if passwords do not need to be changed.
- **Minimum Password Length** - enter a minimum password length from 1 - 20.
- **Alpha Required** - check if each password must include an alpha character (upper or lower case letter a-z).
- **Uppercase Alpha Required** - check if each password must include an uppercase alpha character (upper case letter A-Z).
- **Number Required** - check if each password must include a number (0-9).
- **Special Character Required** - check if each password must include a special character (examples include: !@#\$%).

User Schedule Tab



The *User Schedule* tab is used to set default allowable login times for new users. Changes on this screen will not impact existing users. The schedule can be set for specific users on the *Schedule* tab on the [Users](#) screen.

The available options on this tab are explained below.

**Work Schedule**

- **24 hours, 7 days a week** - select to allow users to login to RPM at anytime.
- **Limit Schedule** - select to set up a limited scheduled for the users.

**Limit Schedule**

When *Limit Schedule* is selected, the allowable login times can be set for each day of the week.

- **Schedule** - check this to set the login times allowed. Uncheck to prevent users from logging in.
- **From Time** - enter the earliest login time allowed.
- **To Time** - enter the latest login time allowed. If RPM is left open after this time, users will be automatically logged out.
- **24 Hours** - check this to allow users to login at any time.

**Copy Schedule**

- **Weekdays** - copy the schedule from the *Copy* day selected to weekdays.
- **Every Day** - copy the schedule from the *Copy* day selected to every day.