



Form Defaults

When creating a new item in Manager, forms typically start off empty. To streamline data entry and maintain consistency, you can set up default values that pre-populate fields in new forms. This feature is known as **Form Defaults**. This guide will walk you through setting up Form Defaults and provide ideas on how to utilize them effectively.

Setting Up Form Defaults

To establish default starting values for new items, you'll use the Form Defaults option within the relevant tab. Here's how to do it using **Sales Invoices** as an example:

1. Navigate to the Sales Invoices Tab

Click on the **Sales Invoices** tab from the left navigation menu.



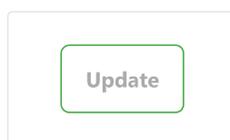
2. Access Form Defaults

In the bottom-right corner of the Sales Invoices screen, click on the **Form Defaults** button.



3. Set Initial Form Values

The Form Defaults screen will appear, allowing you to input default values for new sales invoices. For example, you might set a default due date or select a common customer.



4. Confirm Changes

After entering your desired default values, click the **Update** button to save the changes.

Utilizing Form Defaults

With Form Defaults set, every time you click the **New Sales Invoice** button, the form will be pre-populated with your specified initial values. This not only saves time but also ensures consistency across your records.

Here are some ideas on how to make the most of Form Defaults:

- **Custom Fields:** Establish initial values for custom fields you've added to forms. This is particularly useful if certain custom fields often have the same value.
- **Automatic Reference Numbers:** For transaction forms, you can activate the automatic generation of reference numbers, ensuring each transaction is uniquely identified without manual input.
- **Default Footers:** Set up default footers for new transactions. For instance, you might include payment instructions or terms and conditions on all new sales invoices.

Resetting Form Defaults

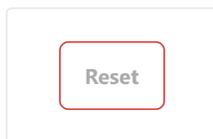
If you need to revert the form defaults to their original empty state, you can easily reset them:

1. Edit Form Defaults

Return to the Form Defaults screen by clicking the **Form Defaults** button in the relevant tab.

2. Reset to Original Values

Click the **Reset** button to clear all default values you've set.



This action will return all fields to their original, empty state. Be sure to click **Update** to save the changes.

Conclusion

Form Defaults in Manager are a powerful tool to enhance data entry efficiency and maintain consistency across your records. By setting up default values for commonly used fields, you minimize repetitive typing and reduce the likelihood of errors. Whether it's

setting a standard due date, automating reference numbers, or adding default footers with important information, Form Defaults help streamline your workflow.

Remember, you can adjust or reset these defaults at any time to adapt to changing business needs.