

Sisukord

Common settings 3

Common settings

- **Address autocomplete** - options no, yes
- **Only configured SSO SAML methods can be used for authentication** - options no, yes
- **Item image tooltip file extensions** -
- **Item code field size** - number field
- **Reports max period in days, entering bigger period will make filter to signal about it** - number field
- **Invoice PID can be placed** - options: from quotation, from order, according to item class
- **User is automatically set as proceeder upon sending mail to data.directo.ee company mailbox** - options no, yes. If it is Yes, then the user, whose e-mail is the same as the one from which the e-mail with the attachment was sent, is automatically assigned as the proceeder, when creating document from unbound attachments. The proceeder is automatically added when saving the document.
- **Digital signing** - options no, ASICE, PDF
- **Directo server link used for messaging** - <https://login.directo.ee/>
- **Document forum uses related quotation forum if present in place of invoice/order forum** - options no, yes
- **Document forum uses customer forum for sales documents** - options no, yes
- **Document copy recalculates the prices** - options no, yes
- **Document copy** - options partial, full. If full, an identical copy is made, if partial, the user-specific fields are replaced with his own (object, user etc.)
- **DataFields copy** - drop-down menu: no, document, datacard, both
- **Document creator mail FROM address** -
- **Documents that also display unbound attachments when present** - in the listed documents attachments are displayed unbound attachments in addition to the specific document attachments, so that they can be linked to a specific document if necessary.
- **Is client name changeable on documents** - options no, yes
- **Proceeder set for document also defines Own right** - with the Own right the user see own documents and also those documents on which has been set as the proceeder.
- **Project set for document also defines Own right** - options no, manager, manager and members. With the option **manager**, the Own right is set to the user indicated as the project manager in the document header. This means that the project manager can see own documents and all the other documents related to the project. If **Manager and members** are selected the document own right applies both to the project manager and the members.
- **Document browsers/pasters have page numbers** - document register displays the total number of documents and the ability to navigate between pages. Can make opening registries significantly slower.
- **Document printouts always opened as PDF** - option No/Yes
- **Fringe benefits transaction locks the car data** - option No/Yes. With option Yes - after the first fringe benefit transaction calculation, the data fields related to the car become inactive so that the data cannot be overwritten by mistake. You can only write in the field „Valid until“.
- **Company bank account/IBAN** - used on printouts and TeleHansa exports
- **Company e-mail** - used on printouts if needed
- **Company fax** - used on printouts if needed
- **Company head or representative** - text field
- **Company legal address** - used on printouts
- **Company legal address 2** - text field
- **Company legal address 3** - text field
- **Company legal name** - used on printouts

- **Company VAT no** - used on printouts
- **Company home page** - used on printouts
- **Company extra info** - used on printouts
- **Company logo URL** - the address of the image used on the printouts. If it's just a file name, it's taken from the Directo local catalogue.
- **Company short code - in window title** - appears in the window titles, used on printouts.
- **Company bank SWIFT** - used on printouts
- **Company bank account/IBAN 2** - used on printouts and TeleHansa exports
- **Company bank name** - used on printouts
- **Company reg no** - used on printouts
- **Company business address** - used on printouts if needed
- **Company business address 2** - used on printouts if needed
- **Company business address 3** - used on printouts if needed
- **Company field of activity** - used on printouts if needed
- **Company business name** - used on printouts
- **Company phone** - used on printouts
- **Google drive client_id and client_secret** - text field
- **Helpdesk Phone** - 671 8578
- **Proceeding order for sequential proceeding is not moved onto next level until lower level signatures are set** - if Yes, the proceeding order will not move to a higher level until all lower level signatures have been placed. For example, if the users with points 1, 2 and 3 are designated as proceeders, and if the user with points 2 signs the document for some reason before the user with points 1, then the proceeding order will not go to the user with points 3 until the user with points 1 has also signed this document. If no, the proceeding order would immediately go to the user with points 3.
- **Sequential proceeding enables document confirming only when top level user signature is present** - if Yes, then it is checked upon confirming, whether the document has the user signature, who has the highest number of points assigned to this document in the user rights settings.
- **Sequential proceeding displays proceeders sorted by time (instead points as usual)** - if Yes, the proceeders assigned to the document are shown based on the chronological order of their addition to the document, not on the basis of the proceeders points.
- **Scale com port** - text field
- **Can invoices be overpaid** - the invoice balance must not become negative as a result of receipt/payment or crediting.
- **Mail sending depends on view or print right?** - whether emailing documents requires only one or both rights? Options View and Print
- **Is object paster a matrix one** - if Yes, objects are divided into dimensions by levels when placed. Useful if several objects are used on the document/rows at the same time.
- **User group which defines default designable data fields** -
- **User codes to choose from for the signing invitation** -
- **Folder proceeding type** - parallel, sequential
- **Customer type is mandatory** - options No, Yes, Yes and Country
- **Contact Social Securty code prefix** -
- **Contacts are relate to each other** - options Not Related, By Name, By Social Security Number
- **Contact has First and Last name** - options No, Yes
- **Expense confirming expects proceeding to be fully signed** - options No, Yes
- **Expense proceeding uses user based sum limit** -
- **Expense proceeding mandatory number of signer role users** - number field
- **Expense proceeding type** - parallel, sequential

- **Expenx PID can be placed** - from quotation, from purchase order
- **Expenx status which has expense due** - paid
- **Expenx expense due is with rows** - options No, Yes
- **Public web fom log for mail** - email image link and system style. Preferably <http://directo.gate.ee/logos/>
- **Document browsers exceptions** -
- **Contract payer is Customer Invoice payer** -
- **Contract next controll date is reminded to** - options Contract supervisor, Contract salesman, Customer manager, Contract supervisor 2
- **Contract class which defines default designable data fields** -
- **Number of rows on contract comment field** - number field
- **Contract list report invoice period control** - options Invoice date, Row period
- **Contract Worktime Start** - number field
- **Contract Worktime End** - number field
- **Contract Default Period option** - options Advance exact, End exact, Advance month, End month
- **Contract must have project specified in header or in all rows** - options No, Yes
- **Time tracking of contract billing** - options No, Yes
- **Contract to Invoice resource must be confirmed** - options No, Yes
- **Contract to Invoice resource must be closed** - options No, Yes
- **Payment graph reason codes** - Contract,Payment schedule,Agreement,Deposit,Disadvantages,Explaining
- ***Max rows in lists** - number field
- **Tax formula that determines car Kw price** - code **ES_AUTO_KW**. Determines the car's kW price according to the car's age.
- **Tax formula that determines the 100% usage of cars** - code **KMD100**
- **Tax formula that determines the 50% usage of cars** - code **KMD50**
- **Tax formula that determines car social tax** - code **ES_AUTO_SOTS**. Determines the social tax for cars.
- **Tax formula that determines car income tax** - code **ES_AUTO_TM**. Determines the income tax for cars.
- **Attachment adding rights** - options Both, One of the rights
- **Attachment sort displays records having external identification before others** - options No, Yes
- **Bulk confirmer stops on first unconfirmable document** - options No, Yes
- **Massmail user code** - user
- **Massmail sender** - options Confirmer, Salesman, Bulkmail user
- **Massmail delay between mail sending in seconds** - number field
- **Mail sending user code - SMTP configuration of this user is used when mail is sent** - user
- **Proceder can set him/herself as signer** - options No, Yes. If it is Yes, the **Add self** button will appear under the purchase invoice procedure tab.
- **Proceder notification for what roles** - determines whether the signer of the document, the recipient of the information, both or no one will receive an email about the notification procedure.
- **Document can be mailed from Proceeding report** - if Yes, an Email button appears in the Proceeding report, which opens a window for sending the document by email.
- **Document can be saved from Proceeding report** - if the setting is applied, a save button will also be added to the report.
- **Proceeding denial notification receiver** - if the user presses the deny button instead of the sign button, it is possible to configure that someone will receive a notification about this. The

setter is the user who added the proceeder to the document. Admin is the user specified on his/her personnel card for the given document type.

- **Determining the number of mandatory signers for proceeding also takes current proceeding substitutes into account** - options No, Yes
- **Proceeding notification does not provide direct links to documents** - if the setting is No, a direct reference to the document is also sent to the proceeder i.e. a link which will immediately lead to the Directo page when clicking on it. If the setting is Yes, the link to the document with the notification will not be sent to the proceeder.
- **Proceeding notification link to bureau address** - options No, Yes
- **Proceeding notifications days when notifications will be sent (1=Monday...7=Sunday)** - if you want notifications to be sent only on working days, you could fill in the box 1,2,3,4,5 ie Monday, Tuesday, Wednesday, Thursday and Friday.
- **Proceeding notification priority (IMPORTANCE)** - Normal, High
- **Proceeding notifications interval (hours when notifications will be sent)** - for example, if you want the email notification to come at the beginning and end of the working day, you can write 9,17 in the box. Then notifications are sent at 9 am and 5 pm. Notifications are only sent during full hours.
- **After how many minutes window is considered as closed when it is left open** - \\this setting is used by the document alert system. Normally, a warning is displayed if an open document has already been previously opened by someone else and has not yet (in Directo's opinion) been closed. This means that if user A opened a document and user B opens the same document, B will see a warning that A has the same document open.
What happens if you make changes to the document and save it in this situation? The user who previously opened the document loses the changes he/she made when saving later. Therefore, the correct behaviour would be not to overwrite the document itself when you see such a message. If necessary, contact the person who has it open.
If the time set here is exceeded, the warning will not be displayed, even though Directo thinks the document is not yet closed. A value 0 disables the warning.
- **How many days before the next control date user will be warned** -
- **Mobile devices display print layout selection when mail or print button is pressed** - options No, Yes
- **Modules** - if the content is T, then production orders are also shown in the item stock level report.
- **Modules, where document browser uses text based sorting for numeric codes** -
- **Modules that also send printout content as email content (if email editing is not enabled)** -
- **mTasku username** - username received by Telia
- **mTasku password** - password received by Telia
- **Sales contract sale start and end are always same as contract start and end** - options No, Yes
- **Nets Cloud@Connect username** -
- **Nets Cloud@Connect password** -
- **Object matrix paster levels whose objects are resolved from project** -
- **Object code field size** - object field size, 8 by default. A larger number expands the width of the field in the document line.
- **Purc. Invoice PID can be placed** - from quotation, from purchase order
- **Order can be made out of quotation when delivery time is in past** - options No, Yes
- **PDF digital signature configuration** -
- **PDF displayed as PNG** - mobile devices, always in proceeding report
- **PDF printout** - downloads, opens in window
- **PDF has embedded fonts** - options No, Yes

- **Main menu sorting** - default setting that applies to everyone - either by order or alphabetically, the order can be changed.
- **Rental default unit** - drop-down menu: month, day, w/o sunday, work day
- **Rental contract's default start time** - the time of day
- **Rental contract's default end time** - the time of day
- **Rental contract's default billing day** - number
- **Resource warning if time is outside time window** - options No, Yes
- **Resource priority changeing according to deadlines** - number
- **Serial number/patch field name** - the SN field name on the documents (for example, either Model or Serial number). If the field is empty, then the serial number column is not displayed at all on the documents.
- **Serial number/patch field size** - number
- **Unbound attachment notification interval (hours when notifications will be sent)** - comma separated list
- **Unbound attachment notification user code (to whom mail is sent)** - username
- **Unbound attachments list under document attachments also displays records from Document transport registry** - options No, Yes
- **System colour** -
- **System colour head** -
- **System colour dark** -
- **Notification channel security ID** -
- **Maintenance plan uses Customers Delivery address when possible** - options No, Yes
- **Maintenance plan uses Contract item for Event jobs** - options No, Yes
- **Action Plan one day Event length in Hours** - number field
- **Character to search empty field** - if the datafield is written as text, the empty field is excluded with the empty field exclusion character described in the system settings.
- **Reg number is set as code for new supplier (when supplier is detected)** - options No, Yes
- **Reg number is set as code for new customer (when customer is detected)** - options No, Yes
- **New contact address is filled** - drop-down menu: no, address, delivery address
- **New Contracts Class** -
- **Survey must be confirmed** - options No, Yes
- **Survey confirming expects proceeding to be fully signed** - options No, Yes
- **Survey proceeding uses user based sum limit** - options No, Yes
- **Survey proceeding mandatory number of signer role users** - number field
- **Survey proceeding type** - parallel, sequential
- **Survey has Customer and Supplier as well** - options No, Yes
- **Vaikimisi ABI keel** -
- **Vaikimisi kliendi tüüp** -
- **Vaikimisi seeria** -
- **Väljatrüki lisainfo 1** -
- **Väljatrüki lisainfo 2** -
- **Väljatrüki lisainfo 3** -
- **Väljatrüki lisainfo 4** -
- **Väljatrüki lisainfo 5** -
- **Väljatrüki prefiks manuse jaoks** -
- **Väljatrüki rea pikkus sildiprinteril** -
- **Väljatrüki ridade arv** -
- **Väljatrüki ülemine serv PDFi jaoks** -
- **Väljatrüki vasak serv PDFi jaoks** -

- **Väljatrükile lisatavad transpordi parameetri tüübid -**
- **Väljuvate meilide DKIM signeerimise domeen -**

From:

<https://wiki.directo.ee/> - **Directo Help**

Permanent link:

https://wiki.directo.ee/en/yldine_settings?rev=1669294358

Last update: **2022/11/24 14:52**

