

General Settings

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General Settings

Settings > General Settings > Company Information

Company Information: This information may be used in a variety of places throughout the system wherever heading and address info is needed.

Enable system logs: If box is checked, each time a user signs on or attempts to sign on is logged. This log can be accessed in menu option Sign On - Advanced - Users - Log. Select the user or (All) and click.

URL for mapping addresses: Determines the link it goes to when you click the map address button to view the address on a map. The button looks like a globe and exists on the vendor edit form.

Time Zone: This information may be used in a variety of places throughout the system wherever timestamps are used.

Settings > General Settings > Web

Sales System Transaction Drill Down: For use with the SGA Sales system only. This identifies the system (SGA Sales), source (SL), and url path (client specific) for drilling down from transactions in SGA Accounting directly to the registration detail in SGA Sales.

Path: Unique URL assigned by SGA for your SGA Accounting Web Application. DO NOT CHANGE.

Log out after ____ minutes of inactivity: Security setting that logs user out if there is no activity in the web browser for a set number of minutes, if enabled. The SGA recommended minimum is 60 minutes or more to prevent work loss. This setting may require clearing browser cookies to take effect.

Log out every ____ days: Security setting that logs users out after a set number of days, if enabled. This setting may require clearing browser cookies to take effect.

Clear SGA Cookies when browser closes: Setting to clear all authentication cookies when the web browser being used to access SGA is closed if enabled. This will log users out and will delete Two Factor Authentication timeout tokens (if enabled) as well. This setting may require clearing browser cookies to take effect.

Authentication

SGA Accounting allows the option to utilize your Windows Active Directory. This is maintained in **Settings > General Settings > Authentication.**

SGA authentication: user names and passwords are maintained in SGA Users.

Dft password expires every x number of days: If checked this requires the user to change their password regularly.

Warn x number of days before password expires: Warns the user in advance before their password expires.

Allow user to change password after it expires: If this is not checked and a user's password

expires then an administrator will need to log in and enable their user account.

Disable user account after x login attempts: If this is checked and a user's password expires then an administrator will need to log in and enable their user account. This is done from users. Users will receive a message on the login screen when two and one login attempts remain before the account will be disabled.

Require letters: Forces a more secure password.

Require numbers: Forces a more secure password.

Require special characters: Forces a more secure password.

Minimum number of characters: Set the minimum number of characters required for a user password.

Maximum number of characters: Set the maximum number of characters required for a user password.

Strict Message: Rules for creating a password based on the settings above.

Log out after ____ minutes of inactivity: Security setting that logs user out if there is no activity in the web browser for a set number of minutes, if enabled. The SGA recommended minimum is 60 minutes or more to prevent work loss. This setting may require clearing browser cookies to take effect.

Log out every ____ days: Security setting that logs users out after a set number of days, if enabled. This setting may require clearing browser cookies to take effect.

Clear SGA Cookies when browser closes: Setting to clear all authentication cookies when the web browser being used to access SGA is closed if enabled. This will log users out and will delete Two Factor Authentication timeout tokens (if enabled) as well. This setting may require clearing browser cookies to take effect.

Use Google Drive and OAuth2 for reports and lists: Define the settings for using Google Drive excel connection strings on reports. When set, connections can have Google accounts applied to them and the google drive picklist can be used to select an excel file.

(Two Factor Authentication does not apply to Sales.)

Use Two Factor Authentication: If enabled, users will be required to enter an authentication code sent via email or SMS message to access SGA. A valid user name and password or OAuth token is still required to log into SGA. This is an all or nothing setting, it can not be applied to users selectively.

Use Two Factor Authentication for Windows: This setting applies only to the Legacy SGA Windows Application and is not used by SGA Web Accounting.

Use Device Authorization Timeout: If enabled, this allows an SGA user to save a token that enables access to SGA without entering a 2FA authorization code. This token is user specific and will expire after the period set in the "Device Authorization Timeout" field, SGA recommends that this be set to no less than 10 hours. This token is cleared when the web browser is closed if the "Clear SGA Cookies when browser closes" feature is enabled. Contact SGA Support for more information.

OAuth2 Login Providers: Users with administrator permissions will have access to this section to maintain their credentials and configuration when using OAuth for SSO login.

Excel Settings

This is where you can specify properties of an Excel spreadsheet when something is exported to Excel. Reports exported using a report writer have their own Excel properties that are defined per report.

Page orientation: Determines if a sheet will be portrait or landscape when printing it. Using auto-determine will make a sheet portrait unless it overflows horizontally. In that case it will be landscape instead.

Initial save folder: The initial folder when saving or exporting to Excel, though you can change it at the time you export.

Gridlines: Exports with border lines the same color as the grid's lines; it does this by using Excel's borders. If this is checked these lines will also print when the sheet is printed.

Bold headers and totals: Bolds all headers as well as total lines.

Header line: Adds a horizontal line to separate the column headers from the rest of the grid.

Colors/shades: Exports rows the same color as they are in the grid. These colors will print also, so if not using a color printer it will print in a relative shade.

Black and white: Determines if color is enabled for printing on all printers. If you wish to disable color so that no one can print in color then check this.

Password protect all workbooks: Protects all workbooks exported to Excel so that the data cannot be modified unless a password is supplied.

Font: The font name and size of all data exported in.

Print Settings

This is where you can specify properties reports are printed in. Reports exported using a report writer have their own Print properties that are defined per report.

Page orientation: Determines if a sheet will be portrait or landscape when printing it.

Color: Determines if color is enabled for all printers. If you wish to disable color so that no one can print in color then set this to black and white.

Gridlines: Prints gridlines the same color as the grid's lines.

Bold headers and totals: Bolds all headers as well as total lines.

Header line: Adds a horizontal line to separate the column headers from the rest of the grid.

Colors/shades: Prints rows the same color as they are in the grid. If not using a color printer it will print in a relative shade.

Margins: The default margins for sheets exported to Excel.

Font: The font name and size of all data exported in.

Email Settings

This defines the method by which you wish to send any emails in SGA through.

Email Method: Choose what you want to use to send emails through. You can choose Microsoft Outlook or SMTP. SMTP is recommended if you have access to an SMTP server in which to send emails through. Most companies do; you just have to talk to your IT staff to find out. If you use Outlook a warning message will be displayed every time you send an email through SGA, which is

nuisance.

Outgoing mail (SMTP): If you wish to use email capabilities of SGA software, then you must specify an SMTP server in which to send email through. If using this method you may need to use the mail router of your ISP in order to send mail outside your domain. Most servers require authentication in order to send outgoing mail outside your own domain. If this is the case, enter the user name and password as well.

From Administrator: This is the “From” address for all emails that will appear in people’s inboxes. Keep in mind this will also be the address that will get replied to if the recipient chooses to reply to the email. If an invalid email address is entered, then you will either get an error while mailing or an email will be sent to the “from address” as undeliverable.

Troubleshooting SMTP

If having trouble sending mail to an address outside your own domain you may need one or both of the following.

- Change your SMTP server to be the mail router of your ISP.
- Specify a user and password for authentication.

If you get an error message saying it can’t find the server then there may be a firewall or Ani-Virus software blocking the ability to send email.

McAfee antivirus “VirusScan Enterprise” software will prohibit sending emails by default. You need to add all email-sending executables to the “processes to exclude” list found within the “prevent mass mailing worms from sending mail” rule found within the “Antivirus Standard Protection” category found within the Access Protection Properties found within the VirusScan Console. Add SGA.exe to the list of executables.

For steps on adding New From Email click [here](#).

Constant Contact: (API Key, Access Token): Used only for marketing emails by the SGA Sales member management system. Contact SGA Support for assistance setting with setting up and enabling this service.

Mail Chimp (API Key): Used only for marketing emails by the SGA Sales member management system. Contact SGA Support for assistance setting with setting up and enabling this service.

Twilio: Twilio is used for SMS (text) message Two Factor Authentication codes in SGA, if enabled. Twilio is also used for sending SMS (text) messages within the SGA Sales system. Each client must set up their own Twilio account to enable this feature. There is a per message fee collected by Twilio. Contact Support for assistance with setting up and enabling this service.
