General Preferences

General Preferences control a variety of interface options on a team-wide basis. Changes made here appear for all selected teams, unless a user has customized their own preferences in their own Preferences menu. You can create multiple configurations and apply them to different teams.

Setting General Preferences

The General Preferences wizard allows you to manage existing preference configurations or create new configurations.

To access the General Preferences wizard:

1. Click the **Setup** gear in the top-right corner and go to **Look and Feel > General Preferences.**
2. Edit an existing preference configuration, or click New to create a new configuration.
3. On the General tab, add a label, a name, and description for the configuration.
4. On the Preferences tab, set the general interface options, such as:
   - Warning for unsaved changes in split view
   - Requiring confirmation before closing a form or window
   - Which actions open a new window
   - Using browser tabs instead of windows when opening a new window
   - What users see when logging in
   - Showing all records or the most recent search results in table views
   - Showing the table title is displayed in table views
   - Applying new Quick Search filters automatically or requiring the Apply button
5. On the Apply tab, you can assert the current configuration for selected teams and users. This replaces the current general preferences for any team members who haven't personalized their general preferences.
   - The "Apply changes to me now" option applies the new configuration to you. If this is deselected, the changes apply to the selected teams, but they don't override your personalized preferences.
   - The "Make this main default Left Pane for" option makes this configuration the default for users whose primary team is selected in the list. Here, you can also apply this configuration as the default for any new teams that are created.
   - The "Push to users" option controls if and how you offer the updates to affected users.
     - **Do not push changes to users**: This option doesn't push any changes to existing users, but it still allows you to save updates to the configuration for future use.
     - **Force changes upon users**: This updates the preferences for all affected users automatically.

- **Notify users about optional changes**: This notifies users that updates were made to their team's preferences, and they can choose to accept those updates or leave their preferences unchanged. For users without permission to modify their own preferences, this option works the same way as "Force changes upon users," and the changes are made automatically. If you choose this option, you must enter a message to show with the notification.