

Document types

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Overview

Document types are used in the ERP, to tell apart documents with different purposes, for example **Sale orders** and **Calibration orders** (Both are orders, but of different types). Document types are always connected to the document, whose sub-type they are.

Document types

Search...

+

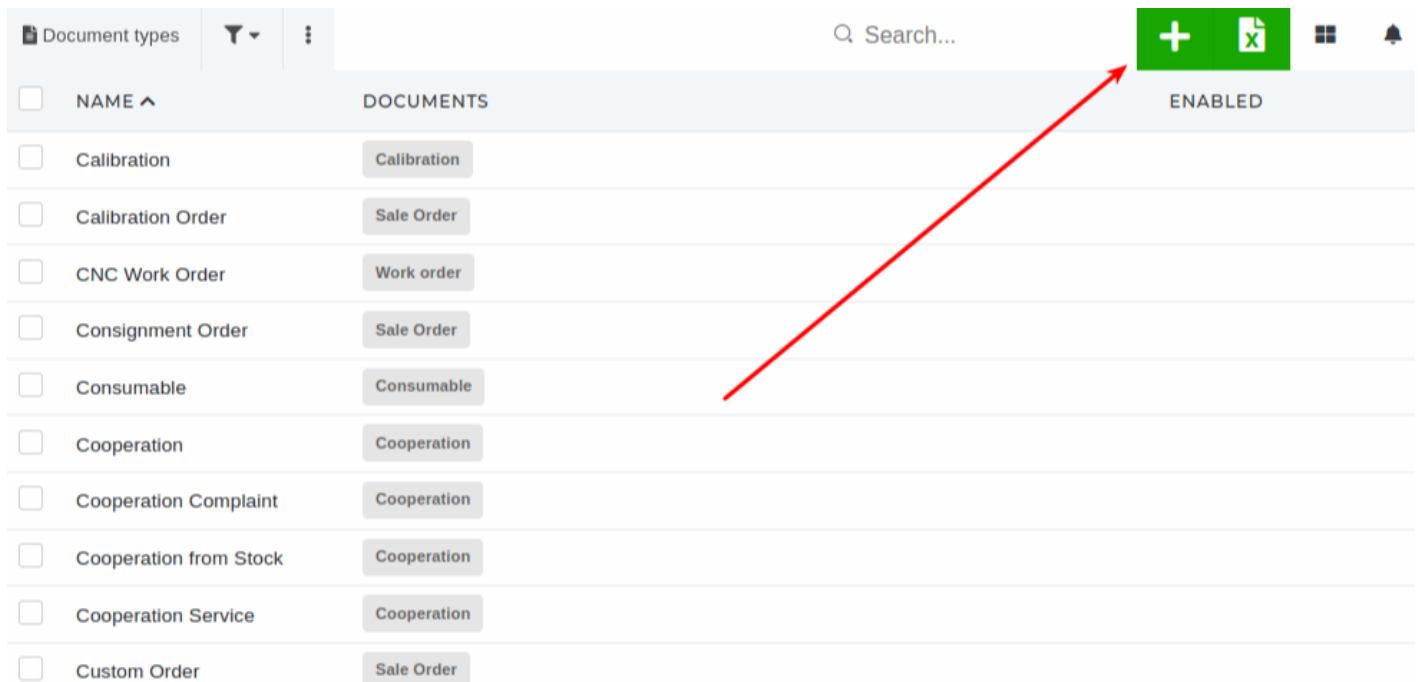
<input type="checkbox"/>	NAME ^	DOCUMENTS	ACTIONS
<input type="checkbox"/>	CNC Work Order	Work order	<div><div></div><div></div></div>
<input type="checkbox"/>	Calibration	Calibration	<div><div></div><div></div></div>
<input type="checkbox"/>	Calibration Order	Sale Order	<div><div></div><div></div></div>
<input type="checkbox"/>	Consignment Order	Sale Order	<div><div></div><div></div></div>
<input type="checkbox"/>	Consumable	Consumable	<div><div></div><div></div></div>
<input type="checkbox"/>	Cooperation	Cooperation	<div><div></div><div></div></div>
<input type="checkbox"/>	Cooperation Complaint	Cooperation	<div><div></div><div></div></div>
<input type="checkbox"/>	Cooperation Service	Cooperation	<div><div></div><div></div></div>
<input type="checkbox"/>	Cooperation from Stock	Cooperation	<div><div></div><div></div></div>
<input type="checkbox"/>	Custom Order	Sale Order	<div><div></div><div></div></div>
<input type="checkbox"/>	DNP work order	Work order	<div><div></div><div></div></div>
<input type="checkbox"/>	Delivery Note	Delivery Note	<div><div></div><div></div></div>

Users with proper permissions can add new and edit existing document types. Document types can also be exported into an excel file.

Create new document type

This action requires the "**create document type**" permission.

Creating a new document type requires no special procedures. When on document types' table view, click the "**Add new**" button to open the "**Add new form**".



The screenshot shows a table titled 'Document types' with columns: NAME ^, DOCUMENTS, and ENABLED. A red arrow points from the 'Consumable' row to a green '+ Add new' button in the top right corner of the table.

<input type="checkbox"/>	NAME ^	DOCUMENTS	ENABLED
<input type="checkbox"/>	Calibration	Calibration	
<input type="checkbox"/>	Calibration Order	Sale Order	
<input type="checkbox"/>	CNC Work Order	Work order	
<input type="checkbox"/>	Consignment Order	Sale Order	
<input type="checkbox"/>	Consumable	Consumable	
<input type="checkbox"/>	Cooperation	Cooperation	
<input type="checkbox"/>	Cooperation Complaint	Cooperation	
<input type="checkbox"/>	Cooperation from Stock	Cooperation	
<input type="checkbox"/>	Cooperation Service	Cooperation	
<input type="checkbox"/>	Custom Order	Sale Order	

While filling out the form, select a document to which this document type belongs. After adding it's name, you have to write a formula, that will be used to generate document numbers for this document type.

Adding a generator formula is important, because the formula defines the structure of a document type's document number.

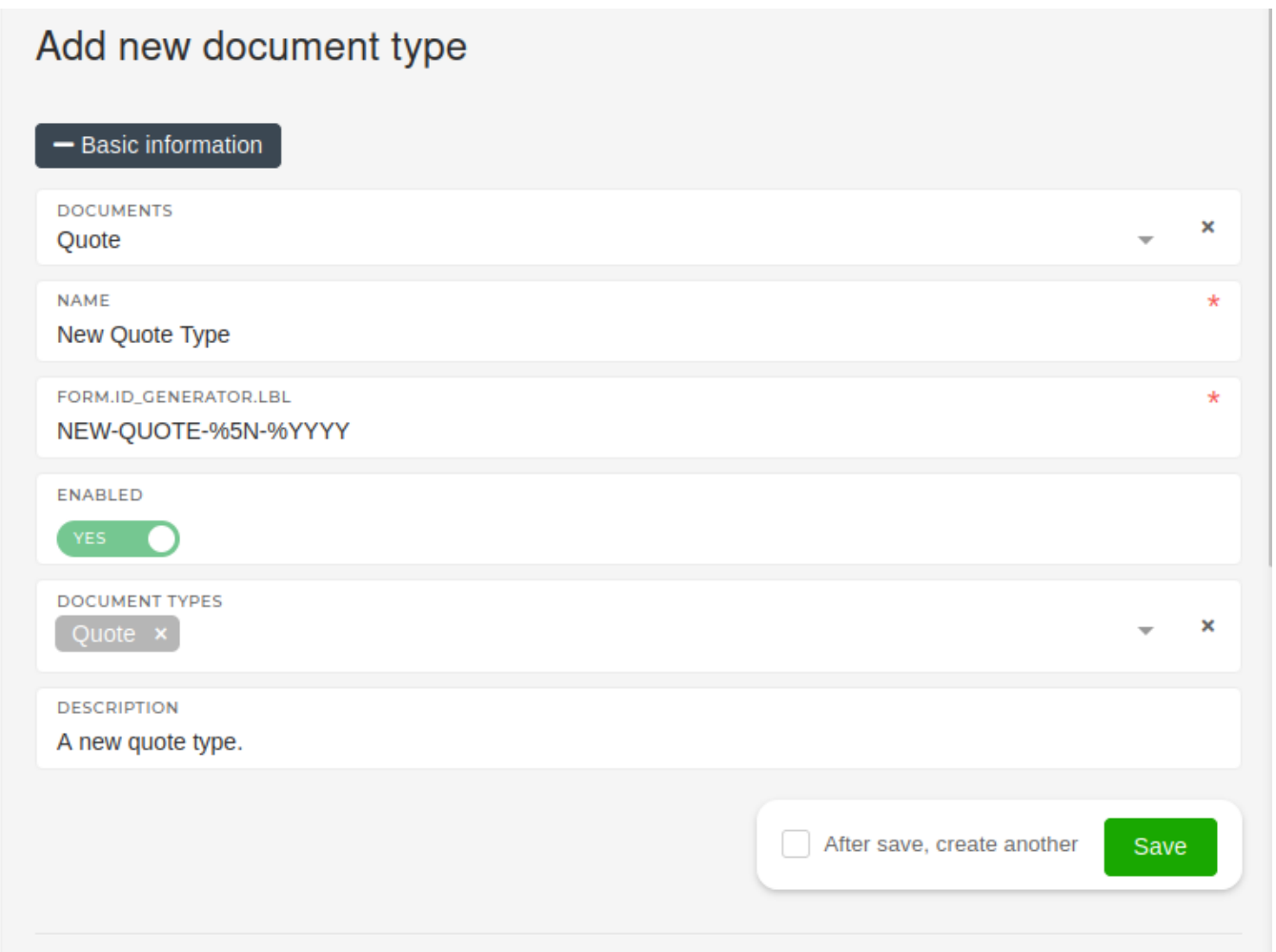
In this example, the formula is **NEW-QUOTE-%5N-%YYYY**, which will generate document numbers, structured as NEW-QUOTE-00001-2024.

NEW-QUOTE- is the prefix that is always the same for all instances of the document type.

%5N is markdown, that defines this as 5 numbers, starting from 00001 up to 99999.

%YYYY is markdown, that defines the date, formatted as year, eg. 2024.

The **document number prefix** should **always** be **unique** to the document type in order to avoid confusion. These prefixes are also useful for quickly discerning a document's type.



The form is titled "Add new document type" and is located on a page with a sidebar containing icons for editing, folders, chat, history, and navigation. The form has a "Basic information" tab. It includes fields for "DOCUMENTS" (set to "Quote"), "NAME" (set to "New Quote Type"), "FORM.ID_GENERATOR.LBL" (set to "NEW-QUOTE-%5N-%YYYY"), "ENABLED" (a toggle switch set to "YES"), "DOCUMENT TYPES" (set to "Quote"), and "DESCRIPTION" (set to "A new quote type."). At the bottom right, there is a checkbox for "After save, create another" and a green "Save" button.

Add new document type

— Basic information

DOCUMENTS
Quote

NAME
New Quote Type

FORM.ID_GENERATOR.LBL
NEW-QUOTE-%5N-%YYYY

ENABLED
YES

DOCUMENT TYPES
Quote

DESCRIPTION
A new quote type.

☐ After save, create another Save

To begin using it, just toggle the "**Enabled**" switch to Yes, and save the new document type.

Update existing document types

This action requires the **"update document type"** permission.

When updating a document type, all information, with the exception of the generator formula, can be changed.

The generator formula must not be changed without consult. If a different document number is required, a new document type with the proper generator formula should be created.

← New Quote Type

— Basic information

DOCUMENTS

Quote

×

NAME

New Quote Type

*

FORM.ID_GENERATOR.LBL

NEW-QUOTE-%5N-%YYYY

*

ENABLED

YES

DOCUMENT TYPES

Quote

×

DESCRIPTION

A new quote type.

Save

+ Additional information

+ File manager

0

+ Comments

0

+ Activity timeline

1

Delete document types

For deletion of existing document types, contact your ERP's administrator.