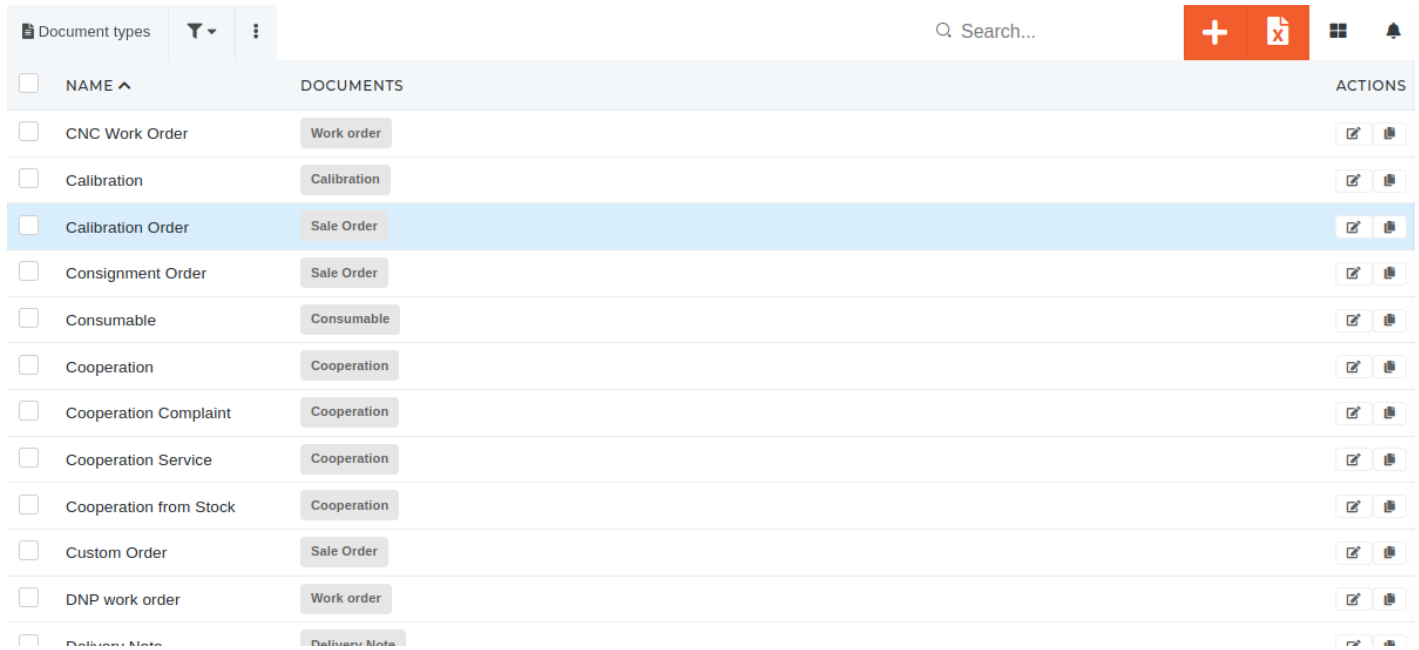


























Document types

- [Overview](#)
- [Create new document type](#)
- [Update existing document types](#)
- [Delete document types](#)

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.



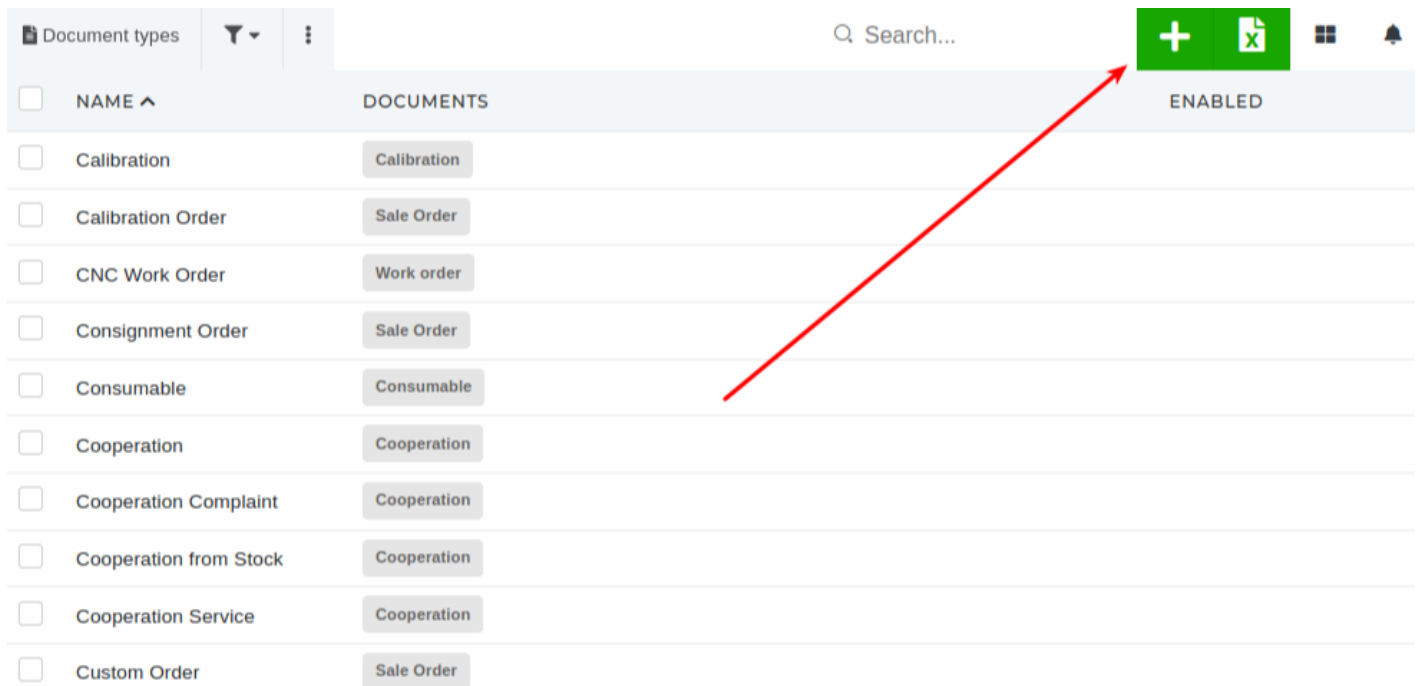
<input type="checkbox"/>	NAME ^	DOCUMENTS	ACTIONS
<input type="checkbox"/>	CNC Work Order	Work order	 
<input type="checkbox"/>	Calibration	Calibration	 
<input type="checkbox"/>	Calibration Order	Sale Order	 
<input type="checkbox"/>	Consignment Order	Sale Order	 
<input type="checkbox"/>	Consumable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

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 with columns: NAME ^, DOCUMENTS, and ENABLED. The table lists various document types, each with a checkbox, a name, a document type, and an 'ENABLED' status. A red arrow points from the 'Consumable' row to the 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 its 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.

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

t

Delete document types

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