

# Documents

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# Overview

The documents page lists all ERP sections, currently used in the ERP. Users cannot add any new document entries or export a generated excel file.

Users with proper permissions can edit existing documents, but adding new documents is not available.

Documents

Search...

<input type="checkbox"/>	NAME ^	DESCRIPTION	ACTIONS
<input type="checkbox"/>	Bom		<div></div>
<input type="checkbox"/>	Calibration		<div></div>
<input type="checkbox"/>	Consumable		<div></div>
<input type="checkbox"/>	Cooperation		<div></div>
<input type="checkbox"/>	Delivery Note		<div></div>
<input type="checkbox"/>	External RMA		<div></div>
<input type="checkbox"/>	Fixed asset		<div></div>
<input type="checkbox"/>	Goods Rebook		<div></div>
<input type="checkbox"/>	Goods Receipt Item		<div></div>
<input type="checkbox"/>	Goods Receipt from Purchase		<div></div>
<input type="checkbox"/>	Goods Transfer		<div></div>
<input type="checkbox"/>	Goods Writeoff		<div></div>
<input type="checkbox"/>	Internal RMA		<div></div>
<input type="checkbox"/>	Issued Invoice		<div></div>
<input type="checkbox"/>	KPI Parameters		<div></div>
<input type="checkbox"/>	Order purchase items		<div></div>
<input type="checkbox"/>	Packing List		<div></div>
<input type="checkbox"/>	Price list versions		<div></div>
<input type="checkbox"/>			<div></div>

# Update existing document

This action requires the "update documents" permission.

On the edit page, document's name and description can be edited, while the table name is not.

← Sale Order

Basic information

NAME

Enter name

\*

TABLE NAME

orders\_sale

\*

DESCRIPTION

Enter description

DOCUMENT TYPE

NAME

Sale Order

\*

DESCRIPTION

Enter description

NUMBERING FORMAT

%5N-%YYYY

\*

DATE FIELD NAME FOR NUMBERING

Enter date field name for numbering year

Duplicate

Remove

NAME

RMA Service Order

\*

DESCRIPTION

Enter description

NUMBERING FORMAT

SE-%5N-%YYYY

\*

DATE FIELD NAME FOR NUMBERING

Enter date field name for numbering year

Duplicate

Remove

NAME

Rental Order

\*

DESCRIPTION

Enter description

NUMBERING FORMAT

RNT-%5N-%YYYY

\*

DATE FIELD NAME FOR NUMBERING

Enter date field name for numbering year

Duplicate

Remove

Users can add new and remove existing document types and edit the document type's description and numbering format, which defines the document number format (eg. **SE-%5N-%YYYY** -> **SE-00001-2024** ).

Users an also add, edit or remove status categories and define category's default name, background color and font style.

STATUS CATEGORY

NAME

Sale orders Default Status

\*

NAME

Enter name

COLOR

FONT STYLE

Select font style

▼

Duplicate

Remove

# Create new document

To add a new document into the ERP, contact your ERP's administrator.

# Delete document

This action requires the "**delete document**" permission.

To delete a document, select it with the checkbox. Once the "trash" icon appears, click it and confirm the deletion. The document will then be deleted.

Be careful, while deleting documents, as currently, adding documents is not supported for users.

Documents		Search...	
<input type="checkbox"/>	NAME ^	DESCRIPTION	
<input type="checkbox"/>	Bom		
<input type="checkbox"/>	Calibration		
<input type="checkbox"/>	Consumable		
<input type="checkbox"/>	Cooperation		
<input type="checkbox"/>	Delivery Note		
<input type="checkbox"/>	Example Document	Example Document	
<input type="checkbox"/>	External RMA		
<input type="checkbox"/>	Fixed asset		
<input type="checkbox"/>	Goods Rebook		
<input type="checkbox"/>	Goods Receipt from Purchase		
<input type="checkbox"/>	Goods Receipt Item		

# Manage create and duplicate functionalities

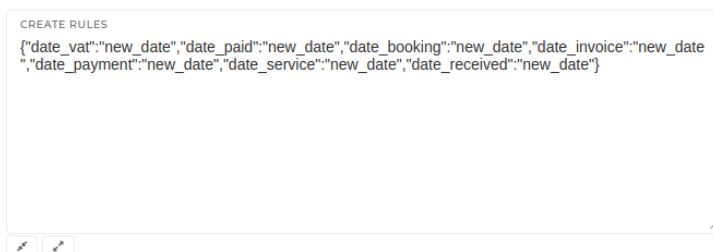
This action requires the **"update documents"** permission.

On the document's page, it is possible to define **"rules"**, that determine what values are written into what fields. (eg. a date field is, by default, set to today's date on the 'create' form).

## Create

Defined in the **"Create rules"** field.

- Here, you can define what values fields are given, when the **"create"** form is loaded
- eg. the **date fields** (date\_vat, date\_paid...) can be set to have the default value of **"new\_date"** when the form loads.



JSON preview:

```
{  "date_vat": "new_date",  "date_paid": "new_date",  "date_booking": "new_date",  "date_invoice": "new_date",  "date_payment": "new_date",  "date_service": "new_date",  "date_received": "new_date" }
```

At current, the **rules** need to be **defined** in the **JSON format**: { "field\_name": "field\_value" }.

## Update

Defined in the **"Duplicate rules"** field.

- The duplicate rules are used, when duplicating a row (eg. products, serials...).
- These rules define which values are copied from the "original" into the **"duplicate"** form.

#### DUPLICATE RULES

```
{
  "fields": [
    {
      "key": "revision",
      "value": null,
      "tax_rate_id": null
    },
    {
      "key": "ever_in_shop",
      "value": false,
      "stock_safety": 0
    },
    {
      "key": "revision_owner",
      "value": null,
      "revision_number": null
    },
    {
      "key": "responsible_user",
      "value": null,
      "stock_safety_set": false
    },
    {
      "key": "amount_production",
      "value": 0,
      "displayed_in_shop": false
    },
    {
      "key": "warehouse_location",
      "value": null,
      "responsible_user_id": null
    },
    {
      "key": "amount_packing_labour",
      "value": 0,
      "revision_release_date": null
    },
    {
      "key": "warehouse_location_id",
      "value": null,
      "revision_owner_user_id": null
    },
    {
      "key": "amount_packing_material",
      "value": 0,
      "amount_production_labour": 0
    },
    {
      "key": "amount_production_material",
      "value": 0
    }
  ]
}
```



> data { }

JSON preview:

```
{
  "fields": [
    {
      "key": "revision",
      "value": null
    },
    {
      "key": "tax_rate_id"
    }
  ]
}
```

At current, the **rules** need to be **defined** in the **JSON format**: { "fields": [ { "field\_name": "field\_value"},... ] }