

Documents

- [Overview](#)
- [Update existing document](#)
- [Create new document](#)
- [Delete document](#)
- [Manage create and duplicate functionalities](#)

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.

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

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.

The screenshot shows the 'Sale Order' edit page. At the top, there is a header with a back arrow and the title 'Sale Order'. Below the header, there is a 'Basic information' section with a 'NAME' field (containing 'Sale Order') and a 'DESCRIPTION' field (containing 'Enter description'). To the right of these fields is a 'TABLE NAME' field (containing 'orders_sale'). Below this, there is a 'DOCUMENT TYPE' section with three rows. Each row has a 'NAME' field, a 'DESCRIPTION' field, a 'NUMBERING FORMAT' field, and a 'DATE FIELD NAME FOR NUMBERING' field. The first row is 'Sale Order' with numbering format '%5N-%YYYY'. The second row is 'RMA Service Order' with numbering format 'SE-%5N-%YYYY'. The third row is 'Rental Order' with numbering format 'RNT-%5N-%YYYY'. Each row has 'Duplicate' and 'Remove' buttons.

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

The screenshot shows the 'STATUS CATEGORY' edit page. It has a 'NAME' field (containing 'Sale orders Default Status') and a 'DESCRIPTION' field (containing 'Enter description'). To the right of these fields are a 'COLOR' field (containing a color swatch) and a 'FONT STYLE' field (containing 'Select font style'). Below these fields are 'Duplicate' and 'Remove' buttons.

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.

<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.

```
CREATE RULES
{"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"}
```

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