


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**".

Document types		Search...		
<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.



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.

Revision #9

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