

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

95N-WYYYY

*

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-WYYYY

*

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