

# Document Type

Document Type view allows user to define types of transaction documents and assign different document numbering schemes for each type, that will be used in the application. For purpose of Audit the running number can be retrieved easily for the different types of transaction documents.

For example:

- 1. Outright Sales Order
- 2. Consignment Sales Order
- 3. Employees Sales Order
- 4. Online Sales Order, e.t.c.

Below actions are available under **“Document Type”**:

 Create, modify, search and delete

Document Type

Document...	Document Type Name	Document ...	Document Sequence	Description
CN01	Outright Credit Note	Credit Note	Outright Credit Note	Outright Credit Note
CN02	Employee Credit Note	Credit Note	Credit Note Sequence	
CO01	Concessionaire Fill Up	Consignme...	Concessionaire Fill Up ...	Concessionaire Fill Up Order
CO02	Consignment Fill Up	Consignme...	Consignment Fill Up Se...	Consignment Fill Up Order
SA01	Stock Adjustment for Breakage	Stock Adjust...	Stock Adjustment Sequ...	Stock Adjustment for inventory that you have damaged and cannot sell
SA02	Stock Adjustment for Wastage	Stock Adjust...	Stock Adjustment Sequ...	Stock Adjustment for inventory that is out of date, or needs to be thrown away
SA03	Stock Adjustment for Write-Offs	Stock Adjust...	Stock Adjustment Sequ...	Stock Adjustment for inventory loss due to other reasons such as theft
SA04	Stock Adjustment for Consumpti...	Stock Adjust...	Stock Adjustment Sequ...	Stock Adjustment for inventory that you use or consume in the course of your business that you are not directly selli...
SI01	Outright Sales Invoice	Sales Invoice	Outright Sales Invoice ...	Outright Sales Invoice
SI02	Concessionaire Issue Invoice	Sales Invoice	Concessionaire Invoice...	Concessionaire Sales Invoice
SI03	Consignment Issue Invoice	Sales Invoice	Consignment Invoice S...	Consignment Issue Invoice
SI04	Employee Sales Invoice	Sales Invoice	Employee Sales Invoice	Employee Sales Invoice
SO01	Outright Sales Order	Sales Order	Outright Sales Order Se...	Outright Sales Order
SO02	Concessionaire Issue	Sales Order	Concessionaire Settlem...	Concessionaire Issue
SO03	Consignment Issue	Sales Order	Consignment Settlem...	Consignment Issue
SO04	Employee Sales Order	Sales Order	Employee Sales Order S...	Employee Sales Order

Document Type#

Document Type Name

Document Name

Document Sequence

Report Title

Source Document Type

Description

Create New Save Revert Delete

Field Name	Description	Mandatory Information
Document Type #	Code number of document type	Y
Document Type Name	Name of document type	Y
Document Name	Which transaction document the type for	Y
Document Sequence	Which document sequence to use	Y
Report Title	Title of the report	N

Source Document Type	Which source document type to inherit the type from	YES for some Document Names (i.e. Sales Invoice, Credit Note, Transfer Receipt)
Description	Description	N

## Create Document Type:

1. Click on **“Create New”** tab at the bottom of the screen

2. Fill up the information at bottom half of screen.

Select a **“Document Sequence”** to be assign to the **“Document Type”**. User will need to create **“Document Sequence”** first using **“Organization (Master) – Document Sequence”**

For certain **“Document Name”**, user will need to select the **“Source Document Type”**. For example, **“Document Name”**: Sales Invoice, Credit Note, and Transfer Receipt

3. Click on **“Save”** to save the document type

## Modify Document Type:

1. Select the document type to modify in the document types list on top half of screen
2. Update the information required
3. Click on **“Save”** button to save the changes.

## Delete Document Type:

1. Select the document type to delete from the document types list on top half of screen

2. Click on ***"Delete"*** button at the bottom of screen

3. Click on ***"Yes"*** button on the pop-up window to confirm record deletion

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