


# 19 Customise module numbering

Through this menu you can modify the sequence and the coding of the prefix of each entity present in the CRM. Once the two variables have been modified, we can update the missing records (i.e. without protocol) using the APPLY button.

**N.B.** Once the prefix of a module has been changed, records previously recognised with the old numbering cannot be updated with the replacement.

 **Settings > Customize Record Numbering**  
Module Entity Number customization

Account Module Numbering

Use Prefix

Start Sequence\*

ACC

19

Select a module

Accounts


Update Missing Record Sequence Now

Apply

Save

Cancel

A practical example of the usage of the record numbering is surely the management of the current year in progressive number of Quotes and/or Sales Order. The year must be insert in the field PREFIX. In this way, every new record will have the year in its numbering. After that you can choose to set the START SEQUENCE to 0.

 **Settings > Customize Record Numbering**  
Module Entity Number customization

SalesOrder Module Numbering

Use Prefix

Start Sequence\*

SO-2023

21

Select a module

Sales Order


Update Missing Record Sequence Now

Apply

Save

Cancel

*Example of numbering with the current year in the Sales Order module*

 **Settings > Customize Record Numbering**  
Module Entity Number customization

Quote Module Numbering

Use Prefix

Start Sequence\*

QUO-2023-

47

Select a module

Quotes

Update Missing Record Sequence Now

Apply

Save

Cancel

*Example of numbering with the current year in the Quotes module*

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