

19 Customise module numbering

- [19 Customise module numbering](#)

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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.

The screenshot shows the 'Settings > Customize Record Numbering' interface for the Accounts module. The breadcrumb trail is 'Settings > Customize Record Numbering' with the subtitle 'Module Entity Number customization'. On the right, there is a dropdown menu 'Select a module' set to 'Accounts' and a button 'Update Missing Record Sequence Now' with an 'Apply' sub-button. On the left, under 'Account Module Numbering', there are two input fields: 'Use Prefix' containing 'ACC' and 'Start Sequence*' containing '19'. At the bottom, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Settings > Customize Record Numbering' interface for the Sales Order module. The breadcrumb trail is 'Settings > Customize Record Numbering' with the subtitle 'Module Entity Number customization'. On the right, there is a dropdown menu 'Select a module' set to 'Sales Order' and a button 'Update Missing Record Sequence Now' with an 'Apply' sub-button. On the left, under 'SalesOrder Module Numbering', there are two input fields: 'Use Prefix' containing 'SO-2023' and 'Start Sequence*' containing '21'. At the bottom, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows the 'Settings > Customize Record Numbering' interface for the Quotes module. The breadcrumb trail is 'Settings > Customize Record Numbering' with the subtitle 'Module Entity Number customization'. On the right, there is a dropdown menu 'Select a module' set to 'Quotes' and a button 'Update Missing Record Sequence Now' with an 'Apply' sub-button. On the left, under 'Quote Module Numbering', there are two input fields: 'Use Prefix' containing 'QUO-2023-' and 'Start Sequence*' containing '47'. At the bottom, there are 'Save' and 'Cancel' buttons.

Example of numbering with the current year in the Quotes module