


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

Select a module Accounts

Update Missing Record Sequence Now Apply


Account Module Numbering

Use Prefix ACC

Start Sequence* 19

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

Select a module Sales Order

Update Missing Record Sequence Now Apply


SalesOrder Module Numbering

Use Prefix SO-2023

Start Sequence* 21

Save Cancel

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

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

Select a module Quotes

Update Missing Record Sequence Now Apply

Quote Module Numbering

Use Prefix QUO-2023-

Start Sequence* 47

Save Cancel

Example of numbering with the current year in the Quotes module

Revision #1
Created 2 September 2024 07:59:13 by Admin
Updated 2 September 2024 07:59:13 by Admin