

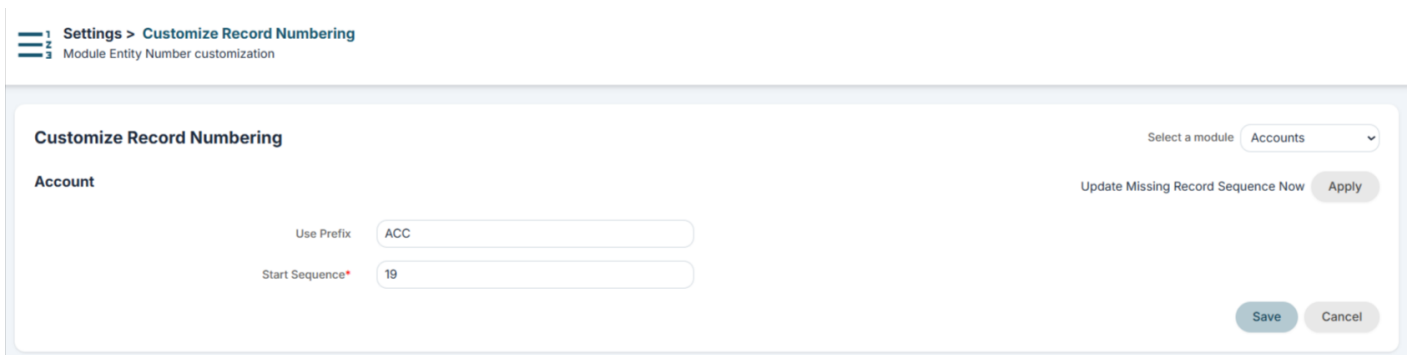
19 Customise module numbering

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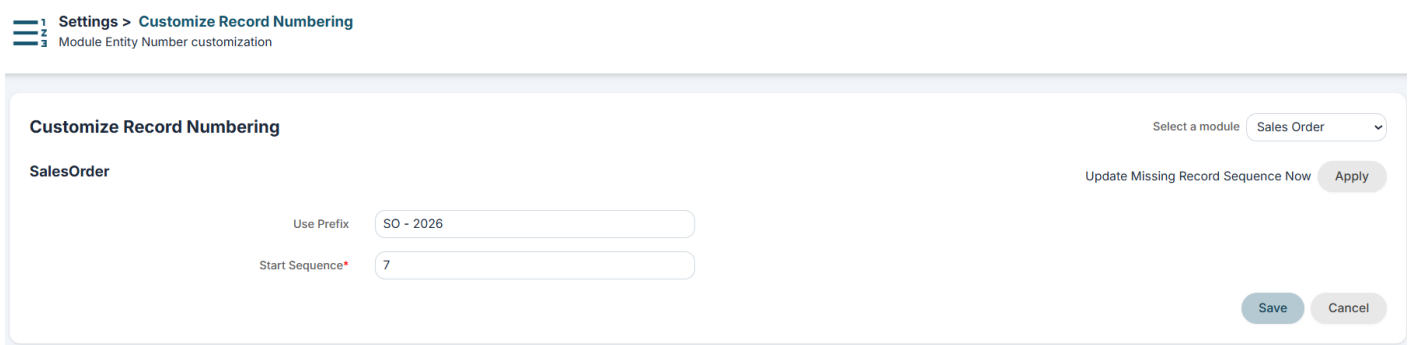
Through this menu you can modify the sequence and the coding of the prefix of each entity present in the CRM. Once the two variables have been modified, we can update the missing records (i.e. without protocol) using the APPLY button.

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 'Customize Record Numbering' interface for the 'Accounts' module. The breadcrumb trail at the top left reads 'Settings > Customize Record Numbering' and 'Module Entity Number customization'. The main heading is 'Customize Record Numbering'. On the right, there is a 'Select a module' dropdown menu currently set to 'Accounts'. Below this, there is a button labeled 'Update Missing Record Sequence Now' and an 'Apply' button. The 'Account' section contains two input fields: 'Use Prefix' with the value 'ACC' and 'Start Sequence*' with the value '19'. At the bottom right, 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 'Customize Record Numbering' interface for the 'Sales Order' module. The breadcrumb trail at the top left reads 'Settings > Customize Record Numbering' and 'Module Entity Number customization'. The main heading is 'Customize Record Numbering'. On the right, there is a 'Select a module' dropdown menu currently set to 'Sales Order'. Below this, there is a button labeled 'Update Missing Record Sequence Now' and an 'Apply' button. The 'SalesOrder' section contains two input fields: 'Use Prefix' with the value 'SO - 2026' and 'Start Sequence*' with the value '7'. At the bottom right, there are 'Save' and 'Cancel' buttons.

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

Customize Record Numbering

Select a module Quotes

Quote

Update Missing Record Sequence Now Apply

Use Prefix

QUO

Start Sequence*

13

Save

Cancel

Example of numbering with the current year in the Quotes module