Add a Document Type

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To add a new Document Type, from the main menu, arrive at the Document Types setup with this path: Setup > Other > Document Types.

The Document Types list opens. Click the Add Document Type button at the upper left of the form.

Document Types				
+ Add Document Typ	•	Show inactive document types		
Code	: Name	:		
Cust-Contract	Customer Contract	🖋 Edit 🛅 Delete		
Site-Floor Plan	Site Floor Plan	🥒 Edit 🛅 Delete		
Sys-Photos	System Photos	🥒 Edit 🛅 Delete		
Site-Photos	Site Photos	🖋 Edit 📋 Delete		
WO-Quote	Work Order Quote	P Edit 🛅 Delete		
AP-Bill	Accounts Payable Bill	Selit 🛱 Delete		
AP-PO Receipt	Accounts Payable PO Receipt	🧬 Edit 🛅 Delete		
AP-Packing List	AP Packing List	🖋 Edit 🛅 Delete	Н	
н н 1 н н		1 - 13 of 13 items 🖉 Refresh		

The Document Type Edit form opens. There are only two data entry fields on this form, and both are required. Each data entry field is described below.

- Code: Enter a code for the document type. Maximum of 25 characters allowed.
- Name: Enter a name for the document type. Maximum of 25 characters allowed.

When finished, click the Save button at the bottom of the form.

Document Type Edit			
	WO-Quote Work Order Quote		
	Save Cancel		