

Numbering

Numbering

Numbering settings set the Mask for any system-generated number on new Folder, Project or Estimate, Invoice, Order, etc. This Numbering mask can be assigned to Project type, for instance.

Numbering Mask

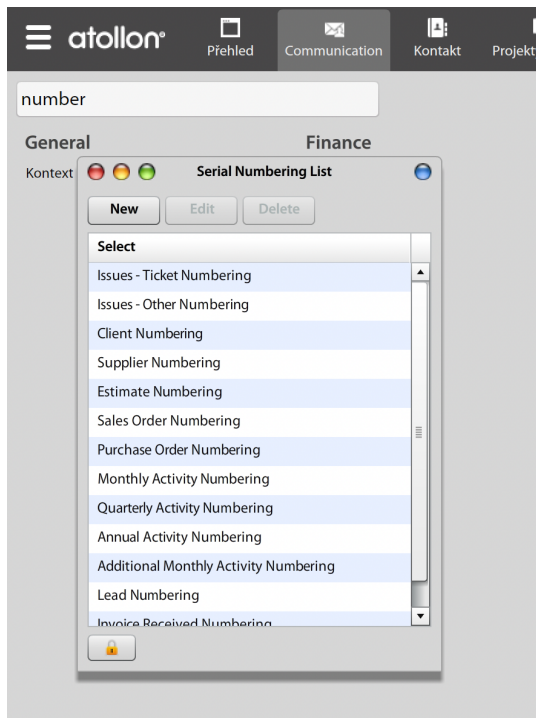
The mask is quite flexible, you can combine several system files, serial number & text strings.

For instance: "INV"YY generates the invoice number like INV110001 for the 2011 year.

S	Serial Number	Is serial selected in Serials selected, using X number of digits defined. Serials can be shared among several Numbering Masks.
YYYY	Long Year	2011
YY	Short Year	11
O	Organization Reference Number	See Settings > Organization in MS Win client.
A	Account Reference Number	Another term for "Folder" reference number.
P	Project Reference Number	Differently also "Job Number"
R	Master Project Reference Number	Number assigned to Slave Project, based on Master Project Ref. ID
U	User Number	Not applicable
M	Month	Month identifier, ie 01 for January
Q	Quarter	Quarter identifier, ie 1 for I. Q.

Edit Numbering Settings

In order to change Numbering Settings, go to: Settings -> Numbering



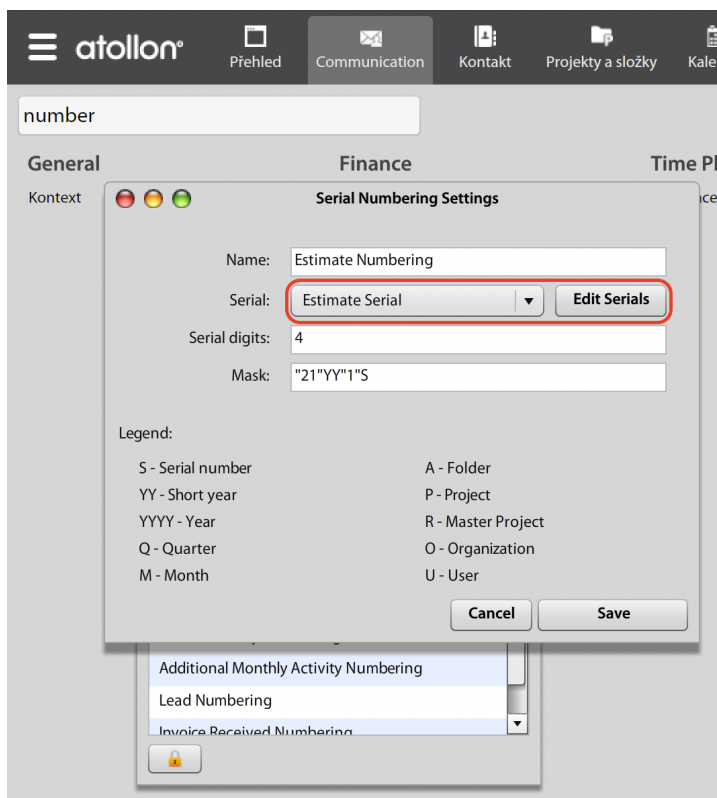
Numbering List allows you to create new numbering Mask or edit existing. When amending Numbering Mask you can set mask format and serial digits. In order to assign the Serial, go to "..." button.

Serials

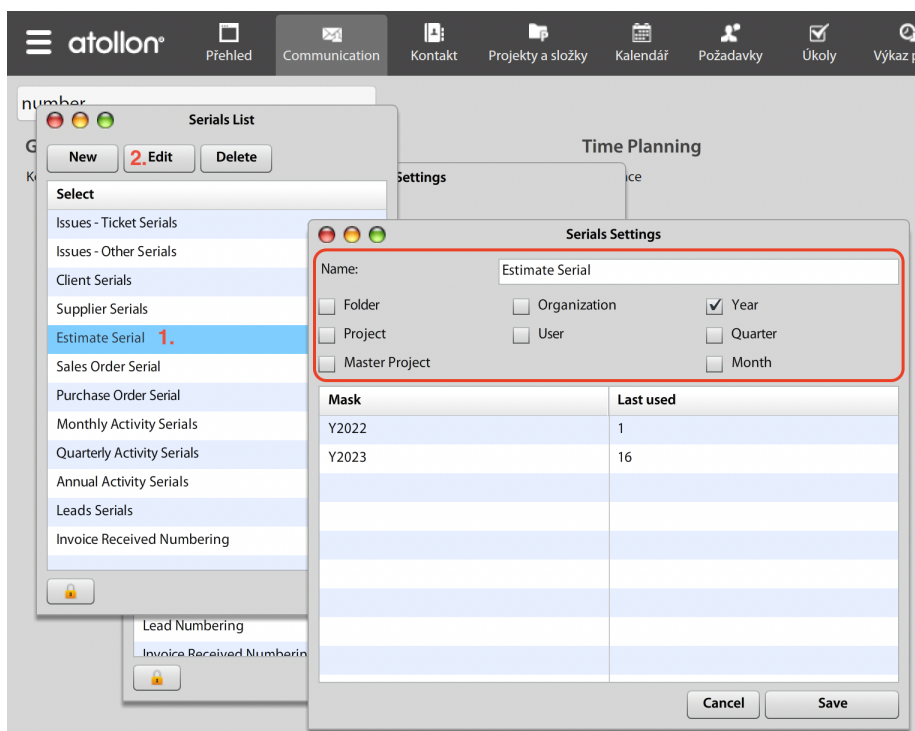
Serials are used to track last number used in Numbering. Serials allow to track several numbering sets, based on Counter Reset Criteria. You can reset the counter automatically based on Organization / Account (Folder) / Project / Master Project / Year / Quarter or Month. (User is not applicable).

Once you need to change last number used, go to Serials & amend the "Next serial" field by double-clicking on appropriate Mask row. (Please note that Next serial number displays **Last used** number in given Reset Criteria).

In order to amend Serials, go to: Settings -> Serials



The Serial list form allows you create new Serial type or edit existing. At Edit Serial you can set "clearing period".



Location, where is possible to link numbering with:

Finance: win client settings/finance/journal

Tasks: web client Options&Tools/Type of Work Settings

Revision #3

Created 23 January 2020 15:03:22

Updated 28 February 2024 07:33:00 by Barbora Šonová