Document Pattern

Module Guide: Document Pattern

Module Location

Settings > Document Settings > Document Pattern

Module Purpose

The **Document Pattern** module is used to define and manage the automatic document numbering formats for various types of transactions and documents throughout the system. With this module, users can create consistent and structured patterns for document numbers, such as invoices and purchase orders, ensuring that every document has a unique and informative identifier.

1. Main View (Document Pattern List)

The main page displays all the numbering patterns that have been created. From here, users can view, search for, and access the detail page to modify existing patterns.

View Explanation

- **Search Filter**: Allows for a quick search by **Pattern Group Name** to find a specific document pattern.
- **Document Pattern Table**:
  - **No**: A sequential number.

    - **Pattern Group Name**: A name that identifies the document or transaction type using the pattern (e.g., `APCreditNotes`, `AssetJournal`).
    - **Pattern**: Displays a visual example of the numbering format generated by the pattern (e.g., `APC2012510-xxxxxxx`).
- **Action Buttons**: Typically, there are buttons to create a new pattern or edit an existing one (though not explicitly visible, this is usually accessed by clicking a row or through a separate button).

2. Edit Pattern Page

This page is used to configure the details of a numbering pattern. Users can define the components, length, sequence, and reset rules for each part of the document number.

View Explanation

- **General Information**:
    - **Pattern Group Name**: The unique name of the pattern being edited.
    - **Print View**: Options related to how this pattern is displayed when printed.
    - **Doc. No., Revision, Transaction Number**: These fields likely display an example or the last status of the generated number.

- **Pattern Component Configuration Table**:
  - **Code**: A unique code for each component (e.g., `Code`, `Year`, `Month`).
  - **Field Name**: A description of each component.
  - **Length**: The number of characters for the component.
  - **Last Number**: The last generated value or the formula used. For example, `#dateformat(now(),'YY')#` to get the two-digit year.
  - **Increment**: The increment value for numeric components, typically `1` for a sequence number.
  - **Sequence ID**: Defines the component's position in the final number format.
  - **Reset**: Rules for resetting the sequence number (e.g., `Never Reset`, `Reset Yearly`, `Reset Monthly`).
- **Action Buttons**:
  - **Update**: Saves all changes made to the pattern configuration.
  - **Cancel**: Discards changes and returns to the previous page.
  - **Add Group Number**: Likely for adding a new component to the pattern.

Integrated Workflow & Business Process

- The patterns defined here will be automatically used by the system whenever a new document of the corresponding type is created.
- For example, if a pattern for an **Invoice** is set up with the components (Static Code)/(Year)/(Month)-(Sequence Number), a new invoice created in October 2025 might have the number `INV/25/10-00001`.
- The **Reset** rule is crucial. Using `Reset Yearly` for the sequence number will cause it to revert to `1` at the beginning of each year, which is a common practice in accounting.

Tips & Important Notes

- The design of a numbering pattern should be done carefully to ensure there are no duplicate numbers and that the format meets reporting and auditing needs.
- Use dynamic formulas like `#dateformat(now(),'YY')#` for date components so that the numbering is always relevant to the document's creation time.
- Once a pattern is in use and transactions have been created with it, avoid changing its main structure, as this can cause inconsistencies in historical data.
- The note ***Company ID will be automatically added after the code*** indicates that the system will automatically prefix the document number with a company ID, providing an additional layer of identification.

Revision #1
Created 22 October 2025 09:09:19 by Muhammad Ali Akbar
Updated 22 October 2025 09:10:36 by Muhammad Ali Akbar