Document templates

refers to:
Maintenance menu → Accounts setup → document templates tab

This tab is used for setting global definitions used in creating Invoices.
This configuration should only be changed under supervision of IQX staff.

Consists of:

- ID
- Name
- Class
- Descriptive Type
- Ledger
- Payment Type
- Report File
- Days to Pay
- Autonumber Type
- Autonumber next
- Autonumber prefix or a linked templateID
- VAT Nominal

There is only 1 Invoice layout for all Invoices and Credits. This MUST be called **SalesInvoice.rtm**

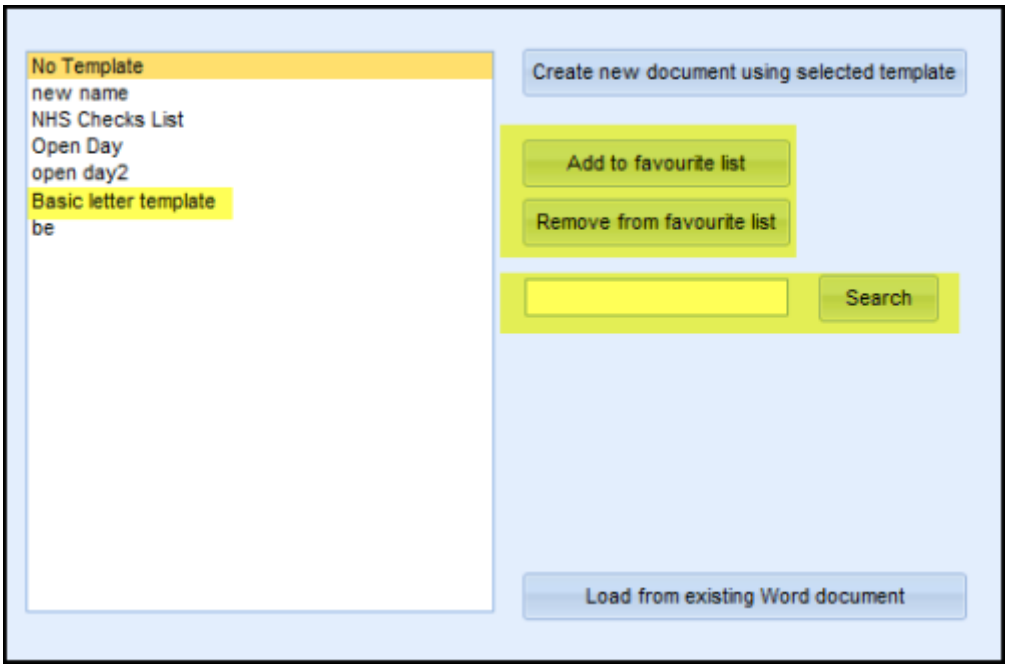
2.16.6

Document Templates. Users can build own “favourites” list. Also search added.

Users can build own Document Templates “favourites” list and search this list.

This feature is accessed from a Contact event window. For example - Person Record - Contact Event icon.

When using document templates;



To use this feature that there is no sort order applied to Document Templates in Agency Setup as sort order overrides the favourites list.

<ifauth @newreleases,@internal>

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