How to create a new document.

Before proceeding with these instructions it is crucial to familiarize yourself with the various **sections** of the Document page (i.e. **toolbar, blue ribbon, document variables** and the **table**).

If you are not yet acquainted with this information, please click here.

The instructions that follow are applicable to the creation of **any** of the listed document types. :

- Quotation
- Invoice
- Receipt
- Purchase order
- Goods received note
- Credit note
- Stock transfer order
- Stock transfer form
- Stock adjustment

It is crucial to note that documents, once created, are **immutable**, meaning they cannot be altered or changed. However, Paperless provides a feature to **amend** a document. Amending does not imply editing the original document, but rather, it involves recalling the information from the original document and creating a new version of it. This new version, although based on the original document, is a separate entity and is assigned a unique document number, distinct from the original document's number. Thus, the integrity of each document is preserved, ensuring accurate record-keeping.

Instructions for creating a **new document** :

1. Open the Document page. Click here to find out how to open this page.
2. Blue ribbon section : Select the desired **document type**.
3. Blue ribbon section : Select a valid **party type** (i.e. **patient, corporate, supplier** or **storerooms**).
4. Document variables section : If the system setting allows for manual entry of the **document number**, specify it accordingly. If the setting is configured for system-generated document numbers (as is the case by default), leave the document number input as is.
5. Document variables section : Choose a **specific party** for the new document you are generating using the given hybrid input. The dropdown of this hybrid input only displays

entities of the type determined by the party type selector in the blue ribbon section. If there is solely one entity of the chosen party type in the database, that entity will be automatically assigned as the specific party for the document, and the specific party selector will be deactivated.

6. Document variables section : If desired, you may provide a **caption** for the document. This step is optional, and any caption specified will be displayed at the top of the document.
7. Document variables section : If you wish, you can designate a **footer** for the document. This is not mandatory, and any footer that is designated will appear at the lower end of the document.
8. Table section : Add one or more rows (i.e. **inventory items** or **services**) to the **table**. Depending on the type of document being created, some columns may have fields that must not be left blank. If you attempt to print a document with a blank required field, the document will not print. Instead, the system will highlight the empty field and prompt you to provide the necessary input.
9. Toolbar section : Click the New Item toolbar button to create a new inventory item previously not in the database.
10. Toolbar section : Click the New Serv. toolbar button to create a new service previously not in the database.
11. Toolbar section : Click the Print toolbar button to **print the document**. If successful this action creates a new document, and this action cannot be reversed.

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