What is the Document page?

The Document Page effectively shows how well a unified design works. Despite the wide range of documents it supports, from quotations and invoices to purchase orders and stock adjustments, the creation process remains consistent. This consistency is the cornerstone of the Document Page, making it a universal tool for document creation.

Each document type, while serving a unique purpose, follows a shared creation process. This process is a three-step journey that begins with the selection of the document type. Whether you're creating an invoice, a receipt, or a stock transfer order, the first step is always to specify the type of document you're creating.

The next step involves selecting a party for the document. This could be a patient, a corporate, a supplier or a storeroom. This step ensures that the document is correctly associated with the right party, providing clarity and avoiding confusion.

The final step is the selection of inventory items or services to be listed in the document. This is where the specifics of the document come into play. Whether it is the products for a purchase order, the items for a stock transfer, or the services for an invoice, this step allows you to customize the document to fit your needs.

The uniformity of this process across all document types is its key attribute. Once proficiency in creating one type of document is achieved, it essentially provides the understanding to create all other types. This not only makes the user experience more straightforward but also significantly lessens the learning curve.

The Document page has the following sections.

The toolbar section

The toolbar offers rapid access to frequently used operations. All toolbar buttons have an icon and a label. The icon graphically signifies the button's function, simplifying the user's understanding of the action triggered by clicking the button. When the page is minimised, the button label is concealed, but icons remain visible at all times.

For the document page the toolbar includes the following buttons:

Print toolbar button

By default this button is grey, which shows that it is inactive. Once one or more objects have been added to the table section of the document page, this button turns green. If it is green, and one or more required fields are blank, then one of the blank required fields is focused on. If it is green, and clicked and there are no blank required fields then the document is saved and printed. The printed document is automatically opened just after it is saved, and a copy of this pdf is saved In the correct folder in the windows explorer. To know the location of the correct folder in the windows explorer, click here.

New item toolbar button or New serv. Toolbar button

It sometimes occurs that as you are creating a document, and selecting inventory items or services for adding them to the table, a user realises that an item or service they wish to add to the document is currently not created in the database. In such instances it is useful to add that missing inventory item or service on the go.

To add a new inventory item on the go, click the New item toolbar button. To add a new service on the go, click the New serv. Toolbar button.

Reprint receipt toolbar button

Press this button to generate an A4-sized printout of a transaction receipt, which could be from a Paperless Retail or Paperless Pharmacy transaction. Upon pressing the button, a dialog box will appear, allowing you to enter the Journal Entry Number of the transaction for which you want to reprint the receipt.

Refresh toolbar button

Click this button to clear all inputs in the Document page and reset the table.

The blue ribbon section

This section has several inputs which are used to define the specific characteristics of the document. It has 2 select inputs which define the document that is to be created, and the currency toggle button.

Blue ribbon section elements :

The document type selector

This dropdown selector enumerates the various document types that can be generated using the document interface, which include:

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

The party type selector

All documents have to have an intended external party which is defined in the document. Before selecting the specific party, first the party type has to be selected. This selector has the following options in its dropdown list: patient, corporate, supplier and storerooms.

Some combinations of document types and party types are not feasible. For example once you select the purchase order as the document type, then the only party type which can be selected is the Supplier since purchase orders are documents meant for communication between the system user and an external supplier. All other party types are greyed out in the party type selector because only the Supplier party type is applicable for a purchase order.

The party type selector selects the type in general, while the specific party object for the document (i.e. the specific supplier that is to receive a purchase order), is selected in the document variables section, specifically the "specific party selector".

The currency toggling button

This button is only visible when the selected document type (within the blue ribbon) is either an invoice or a quotation. On first opening of the document page the document currency is set to the default currency. When clicked, the currency toggling button changes the currency for the document to the next enabled currency. After a currency change, document prices (i.e. sales prices, unit costs etc.). are updated based on the particular exchange rates which are configured in the system. Continuing to click the currency toggling button cycles through the enabled currencies, even returning back to the currency that was defined by default.

The document variables section.

This section is located just below the blue ribbon section. By default it is hidden. This section is only displayed when the party type selector is not blank.

The document variables section elements :

The document number input

Each document has a unique identifier. This identifier does not have to be a number, but it can also be a combination of letters and numbers. By default this value is not user defined, rather it is system generated. For more information on the setting which defines whether the document number is manually typed or system generated, click here.

For system generated documents different document types typically have different prefixes within the document number. Here are the prefixes according to the different document types :

- Quotation (Q)
- Invoice (INV)
- Receipt (R)
- Purchase order (PO)
- Goods received note (GRN)
- Credit note (CN)
- Stock transfer order (PO)
- Stock transfer form (STF)
- Stock adjustment (ADJ)

The specific party selector

Much like the other document variables section elements, this selector is only visible if the party type selector in the blue ribbon is not blank. This selector is a hybrid input. For more information on how a hybrid input works, click here.

The label for the specific party selector depends on the selected party type in the blue ribbon section. This is a required input, therefore each document must have a specific party object selected.

The caption input

This input is optional. If not left blank, then the value of this input is printed as a paragraph just above the table. The purpose of this text is to highlight or describe any notable information regarding the document or transaction. For example for an invoice the tax number or the vat number for the customer may be typed as the caption.

The footer input

Much like the caption, the footer is an optional input. The text typed in the footer appears in the the document just below the table. Many users use the footer input to specify other information regarding the document. For example, within a goods received note the footer input can be used to describe any breakages or other notable occurances which occurred during the delivery.

The table section

The table is used to select and list the items and services which the document is about. The table and various other buttons in close proximity to the table can be called the table section.

The table section elements :

Table rows

Each row in the table within the table section represents a different inventory item or service. No item or service can be selected in more than one row (i.e. there cannot be any repetition of the same item within a document). Each table row is subdivided into several columns, with each column having one input. Most column inputs are regular text inputs. The code and description columns are special and have inputs which are classified as hybrid inputs. For more information on how hybrid inputs work, click here.

Typing in the code or description hybrid inputs filters the available options (items and services) within the dropdown. Sometimes it is desirable to exclude some items or services from the options available for selection in documents. This ability to select specific inventory items or services is done by means of using categories.

There is a setting which specifies the categories of inventory items which are available for selection within a document. There is a separate setting which specifies the service categories which are available for selection within a document. For both settings if the setting is left blank, then all database inventory items or services can be selected from in composing the table section rows.

Add row button

This button is located just below the table. On clicking it, a blank row is added at the bottom of the table.

Delete row button

Located just below the table. To delete one or more table rows, first check the checkboxes to the far left of all the rows you wish to delete. After that click the delete rows buttons.

Table total amount display

Located just below the table. It is visible for most document types excluding the following : purchase order, stock transfer order and the stock transfer form. When the document currency is toggled by use of the currency toggle button in the blue ribbon, the total display is also updated to display the total in the updated document currency.

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