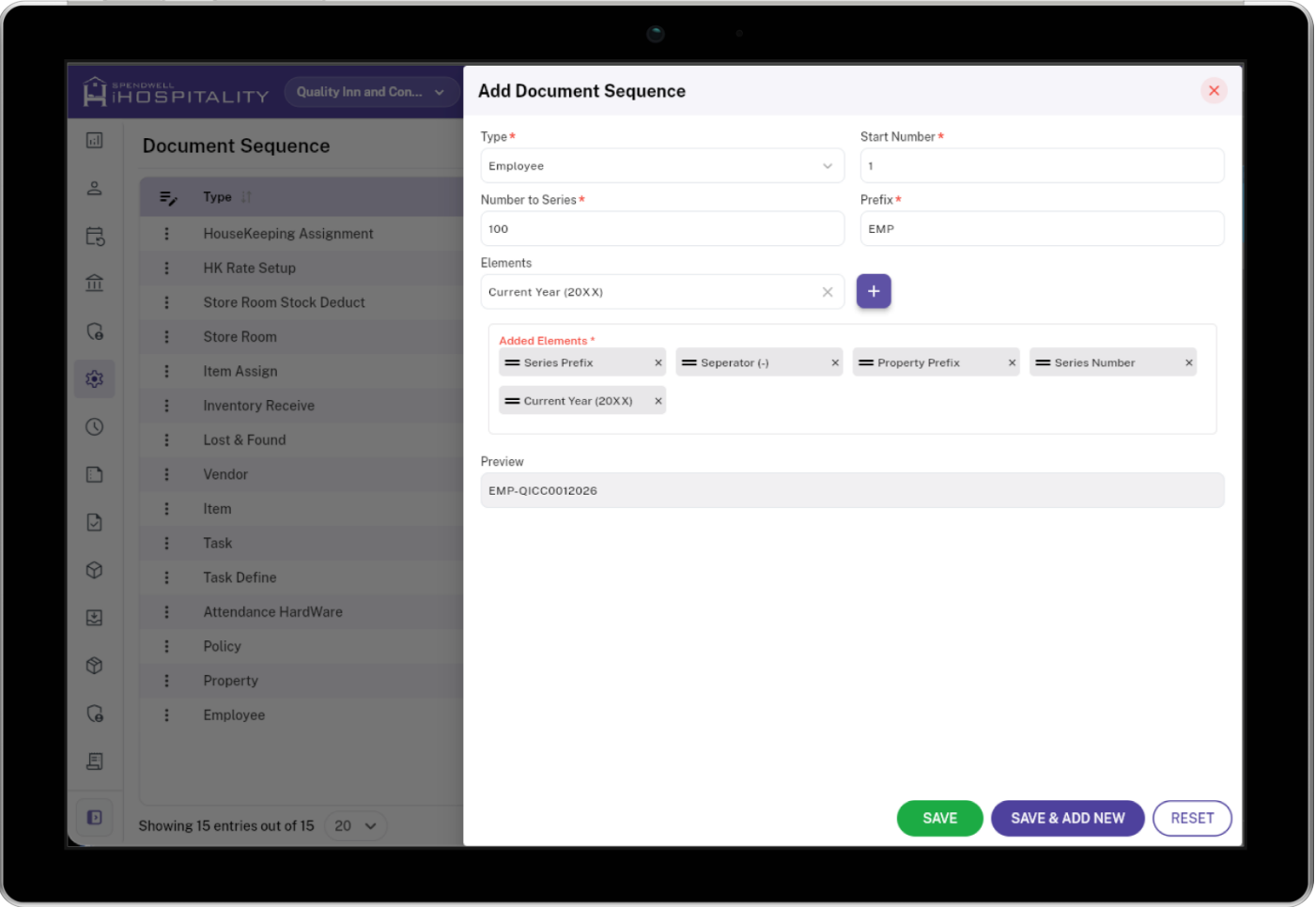


Document Sequence

The **Document Sequence** feature is used to create a standard numbering format for documents, records, or transactions.



“ **Purpose:** Create a document numbering format such as **EMP-QICC0012026** .

1. What Goes Where?

Field	What to enter
Property*	Select the property
Type*	Select what the sequence is for
Date Range*	Select the active period, when shown

Field	What to enter
Reset	Choose when numbering restarts: Every Day, Every Month, Every Year, Never
Start Number*	First number in the sequence
Number to Series*	Number/range covered by the series
Prefix*	Short identifier for the sequence
Elements	Select parts to build the number
Added Elements*	Arrange the selected parts in order
Preview	Shows the resulting format

* = Required field

2. Build the Number

Think of the **Added Elements** area as building blocks.

1	2	3	4	5
Series Prefix	Separator	Property Prefix	Series Number	Current Year
EMP	-	QICC	001	2026

Result

EMP-QICC0012026

So:

EMP + - + QICC + 001 + 2026
→ EMP-QICC0012026

3. How to Create a Sequence

Step	Action	Example
1	Select Property	Quality Inn and Conference Center
2	Select Type	Employee
3	Set Date Range if available	01-Jan-2026 → 31-Dec-2026

Step	Action	Example
4	Select Reset if required	Every Year
5	Enter Start Number	1
6	Enter Number to Series	100
7	Enter Prefix	EMP
8	Select an Element	Current Year (20XX)
9	Click +	Adds the element
10	Drag elements into the required order	Prefix → Separator → Property → Number → Year
11	Check Preview	EMP-QICC0012026
12	Click Save	Sequence created

4. Elements — What They Do

The **Elements** are the building blocks of the final document number.

Select an element, click +, and arrange the added elements in the required order.

Element	What it does	Example
Series Number	Uses the Start Number and formats it with leading zeros based on the length of Number to Series .	Start Number 1, Number to Series 100 → 001
Series Prefix	Uses the value entered in the Prefix field.	Prefix EMP → EMP
Company Prefix	Uses the configured company preview/label for the selected company.	ABC
Property Prefix	Uses the configured prefix/label for the selected property.	QICC
Vendor Prefix	Uses the vendor name or vendor prefix configured for the record.	VEND
Category Prefix	Uses the category name or category prefix configured for the record.	FOOD
Current Year (20XX)	Adds the complete current year.	2026
Current Year (YY)	Adds the last two digits of the current year.	26
Current Month (MM)	Adds the current month as a 2-digit number.	January → 01

Element	What it does	Example
Current F.Y (20XX/YY)	Adds the financial year in <code>start year/end year</code> format. The financial year starts in April.	2026/27
Current F.Y (20XX-YY)	Adds the financial year in <code>start year-end YY</code> format. The financial year starts in April.	2026-27
Month Alphabets (MM)	Adds the current month using its 3-letter abbreviation.	January → Jan
Year Alphabets (YY)	Adds the last two digits of the current year.	2026 → 26
Current Day (DD)	Adds the current day as a 2-digit number.	5 → 05
Separator (-)	Adds a hyphen between elements.	-
Separator (/)	Adds a slash between elements.	/

🔥 **Important:** The order of these elements controls the final document number.

5. Change the Order

Current order

Prefix → Separator → Property → Number → Year

EMP-QICC0012026

If you change the order

Year → Separator → Prefix → Number

2026-EMP001

Drag and drop the items in **Added Elements** to change their order.

6. Add / Remove Elements

Action	How
Add	Select an item in Elements → click +
Remove	Click × on the element
Reorder	Drag the element to a new position
Check result	Look at Preview

Example

Remove **Current Year**:

EMP-QICC0012026



EMP-QICC001

7. Reset Options

Reset option	Meaning
Every Day	Numbering restarts each day
Every Month	Numbering restarts each month
Every Year	Numbering restarts each year
Never	Numbering does not automatically restart

8. Buttons

Button	Action
SAVE	Save the sequence
SAVE & ADD NEW	Save and immediately create another sequence
RESET	Reset the form