

When recognizing incoming invoices and credit notes you sometimes want to add missing field or remove unwanted fields from the template. During the daily handling of the incoming documents, you are able to adjust which template fields are used in the individual templates. To do this, open the list of open documents in the Document Journal.

Select the tile "Ready to Register" to open the Document Journal.

To add a field to the current template, select "Template" in the ribbon.

NO.	OK	VENDOR	NAME	TEMPLATE NO.	SEARCH TEXT
D000002	<input checked="" type="checkbox"/>	40000	Lewis Home Furniture	T000006	
D000004	<input type="checkbox"/>	30000	CoolWood Technologies		

Select "Add Template Field" to add a template field from the master template that is not already in the current template.

Choose the field desired from the list of available fields configured in the master template. In this session, we will add the "Department" field.

FIELD NAME
Header Fields
No. Series
Job No.
Area
Business Group
Customer Group
Department
Project
Purchaser
Sales campaign

Select "OK" to close the page and return to the Document Journal.

The field "Department" is now available, and you can look up the appropriate department code for this invoice by placing the cursor in the "Department" field.

FIELD	VALUE
Invoice No.	44444478
Invoice Date	04/20/19
Due Date	06/03/19
Our Contact	RL
Our Order No.	
Currency Code	
Department	
Amount Excl. VAT	7,500.00
VAT Amount	1,875.00
Amount Incl. VAT	9,375.00

Select the desired department code. In this session, the "Administration" code is chosen.

Search Show Attached Open in Excel

DIMENSION VALUE LIST - SHORTCUT DIMENSION 1

CODE	NAME
ADM	Administration
PROD	Product Administration
SALES	Sales

Select "OK" to close the page and return to the Document Journal.

atched Open in Excel

T - SHORTCUT DIMENSION 1

NAME
Administration
Production
Sales

OK Cancel

If the current vendor template has too many template fields included, you can easily remove the unwanted fields.

To remove a field from the current template, select "Template" in the ribbon.

READY TO REGISTER | WORK DATE: 1/28/2021

Document Category: PURCHASE

Manage Process Document **Template** Translations Vendor More options

NO.	OK	VENDOR	NAME	TEMPLATE NO.	SEARCH TEXT
D000002	<input checked="" type="checkbox"/>	40000	Lewis Home Furniture	T000006	
D000004	<input type="checkbox"/>	30000	CoolWood Technologies		

Select "Remove Template Field" to remove a template field from the current template.

READY TO REGISTER | WORK DATE: 1/28/2021

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Manage Process Document **Template** Translations Vendor More options

Template Card Add Template Field **Remove Template Field**

Open a window to select and remove a field from the template appli

NO.	OK	VENDOR	NAME	TEMPLATE NO.	SEARCH TEXT
D000002	<input checked="" type="checkbox"/>	40000	Lewis Home Furniture	T000006	
D000004	<input type="checkbox"/>	30000	CoolWood Technologies		

The list of currently assigned templated fields are shown. Choose the desired field to remove from the template.

In this session, we will remove the "Department" field.

FIELD NAME
Header Fields
Invoice No.
Invoice Date
Due Date
Our Contact
Our Order No.
Currency Code
Department
Amount Excl. VAT
VAT Amount

Select "OK" to close the page and return to the Document Journal.

Date

Contract

Order No.

Currency Code

Department

Amount Excl. VAT

VAT Amount

Incl. VAT

Document No.

Description

/ [C]r. Memo

Confirm that you want to remove the department field by selecting "Yes".

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Westminster
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Do you want to remove the field 'Department' from this template?

Select "Back" to return to the role center.

READY TO REGISTER | WORK DATE: 1/28/2021

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NO.	OK	VENDOR	NAME	TEMPLATE NO.	SEARCH TEXT
D000002	<input checked="" type="checkbox"/>	40000	Lewis Home Furniture	T000006	
D000004	<input type="checkbox"/>	30000	CoolWood Technologies		