

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 Activities Document Journal. DOCUMENTS PURCHASE APPROVAL - INVOICES 0 0 ΔΩΤΙΩΝ +To add a field to the current template, select READY TO REGISTER | WORK DATE: 1/28/2021 "Template" in the ribbon. Document Category PURCHASE Template TEMPLATE SEARCH TEXT VENDOR Lewis Home Furniture CoolWood Technologies Select "Add Template Field" to add a template field ← READY TO REGISTER | WORK DATE: 1/28/2021 from the master template that is not already in the Document Category · · · · current template. PURCHASE Manage Process Document <u>Template</u> Translations Vendor More options ✓ Template Card → Add Template Field ➤ Remove Template Field VENDOR NAME NU. SEARCH TEXT ✓ 40000 Lewis Home Furniture Choose the field desired from the list of available TEMPLATE FIELD LIST fields configured in the master template. In this session, we will add the "Department" field. FIELD NAME Header Fields Job No. Business Group Sales campaign Select "OK" to close the page and return to the Document Journal. Excl. VAT 4 ibillity Center al Flow



The field "Department" is now available, and you can Invoice No 44444478 look up the appropriate department code for this Invoice Date 04/20/19 invoice by placing the cursor in the "Department" Due Date 06/03/19 field. Our Contact Our Order No Department Amount Excl. VAT 7.500.00 VAT Amount 1.875.00 Amount Incl. VAT Comments Manage Select the desired department code. In this session, the "Administration" code is chosen. DIMENSION VALUE LIST - SHORTCUT DIMENSION 1 CODE ADM Select "OK" to close the page and return to the tached II Open in Excel Document Journal. T - SHORTCUT DIMENSION 1 Administration Production Cancel If the current vendor template has too many template ← READY TO REGISTER | WORK DATE: 1/28/2021 fields included, you can easily remove the unwanted Document Category PURCHASE To remove a field from the current template, select Translations More options Template "Template" in the ribbon. TEMPLATE VENDOR NAME SEARCH TEXT Lewis Home Furniture CoolWood Technologies Select "Remove Template Field" to remove a ← READY TO REGISTER | WORK DATE: 1/28/2021 template field from the current template. Document Category ..... PURCHASE Manage Process Document <u>Template</u> Translations Vendor More options ✓ Template Card ★ Add Template Field ★ Remove Template Field Open a window to sele NO. OK VENDOR NAME D000002 40000 Lewis Home Furniture T000006 CoolWood Technologies



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

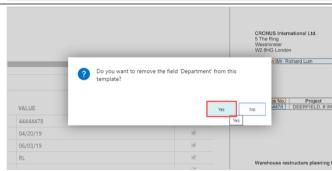
In this session, we will remove the "Department" field.



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



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



Select "Back" to return to the role center.

