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## 5.03 General Usage

### Create Documents

Creating a new document in the work area is described using the document type receipt. After selecting the document type ...

The screenshot shows the Projectile software interface. The top menu bar includes 'Tracking and Recording', 'Offers', 'Projects', 'Invoices', and 'Logout'. A dropdown menu is open under 'Offers', showing 'Occupation', 'Offer', and 'OrderHeader'. The 'Offer' option is selected. Below this, the 'Offer' document form is displayed. The form has a 'Master data' tab and a 'Misc' tab. The 'Master data' tab contains the following fields:

| Field            | Value          |
|------------------|----------------|
| Offernumber      | 3              |
| Offer status     | No Offer       |
| Project          |                |
| Amount           | EUR            |
| Value added tax  | MwSt-D-Voll 19 |
| Offer total      | EUR            |
| OfferCreator     | Conner Jane    |
| Offer date       | 15.10.2009     |
| Valid until date | 29.10.2009     |

The 'Offer lines' section is empty. The form also includes a 'Document' menu and 'Edit', 'View', and 'Actions' buttons.

... an empty document form from the selected document type is displayed. In the example, a new document with the type offer is displayed. The form contains initially only the default values (here the offer number, the employee who created the receipt, the current date, value-added tax, the validity and the status).

Note: In the standard version all required fields in the form are marked red.

In the next step all information fields of the document are filled (Description and Project) and the document is then saved.

## History

Each modification (here offer date and validity) are logged when history is activated.

Using this function, modifications in the form (with the appropriate access permissions) are displayed.

In the example two modifications are logged: Creating the document and two modifications ...

| History Project 1 Introduction Projectile 2.5 |                     |               |              |         |                   |
|-----------------------------------------------|---------------------|---------------|--------------|---------|-------------------|
| Age                                           | Timestamp           | History event | User         | Details | Historic document |
| 1 d 19:52 h                                   | 13.10.2009 16:02:48 | Changed (1)   | Conner Jane  |         |                   |
| 33 d 19:34 h                                  | 11.09.2009 16:20:07 | Changed (1)   | Hahn Katrina |         |                   |
| 36 d 21:39 h                                  | 08.09.2009 14:15:28 | Changed (2)   | Hahn Katrina |         |                   |
| 36 d 21:53 h                                  | 08.09.2009 14:01:15 | Changed (14)  | Hahn Katrina |         |                   |
| 36 d 21:53 h                                  | 08.09.2009 14:01:15 | Created       | Hahn Katrina |         |                   |

... in the fields offer date and validity.

| History Project 1 Introduction Projectile 2.5 |                     |                     |              |                     |                   |
|-----------------------------------------------|---------------------|---------------------|--------------|---------------------|-------------------|
| History Project 1 Introduction Projectile 2.5 |                     |                     |              |                     |                   |
| Age                                           | Timestamp           | History event       | User         | Details             | Historic document |
| 1 d 20:04 h                                   | 13.10.2009 16:02:48 | Changed (1)         | Conner Jane  | ...                 |                   |
| 33 d 19:47 h                                  | 11.09.2009 16:20:07 | Changed (1)         | Hahn Katrina | ...                 |                   |
| 36 d 21:51 h                                  | 08.09.2009 14:15:28 | Changed (2)         | Hahn Katrina | ...                 |                   |
| Field                                         |                     | OldValue            |              | NewValue            |                   |
| 1. Status                                     |                     | Passive             |              | BeingPlanned        |                   |
| 2. Last change of status                      |                     | 08.09.2009 13:59:12 |              | 08.09.2009 14:15:28 |                   |
| 36 d 22:05 h                                  | 08.09.2009 14:01:15 | Changed (14)        | Hahn Katrina | ...                 |                   |
| 36 d 22:05 h                                  | 08.09.2009 14:01:15 | Created             | Hahn Katrina |                     |                   |

History can be closed with  as with every form.

To copy a document, the functionality “Create new document from template” is used.

Offer CS-09-10-6

Document

Edit

View

Back references

Actions

Master data

Misc

Offernumber

CS-09-1

Project

Amount

Value added tax

MwSt-D-voll

Create a new document from this template

Save the document

Copy the document

Delete the document

Copy this document to the clipboard

Reload document

Offer status

No Offer

This functionality copies the existing document and pre-sets the default values. Here, offer 3 becomes offer 4.

Projectile-Online-Handbuch - <https://infodesire.net/dokuwiki/>

Angebot CS-09-06-3

Dokument Bearbeiten Ansicht Aktionen

Stammblatt

Sonstiges

Angebot

4

Bezeichnung

CS-09-06-3

Projekt

1.1 Konzeption

Status

Kein Angebot

Netto

0,00

EUR

Umsatzsteuer

MwSt-D-Voll

Brutto

0,00

EUR

Mitarbeiter

Test

Angebotsdatum

29.06.2009

Gültig bis

13.07.2009

Original-Angebot

Angebotspositionen

Offer CS-09-10-6

Document Edit View Actions

Master data

Misc

Offernumber

CS-09-10-6

Offer status

No Offer

Project

2.1 Planning

Amount

0,00

EUR

Value added tax

MwSt-D-Voll

Offer total

0,00

EUR

OfferCreator

Conner Jane

Offer date

15.10.2009

Valid until date

29.10.2009

Offer lines

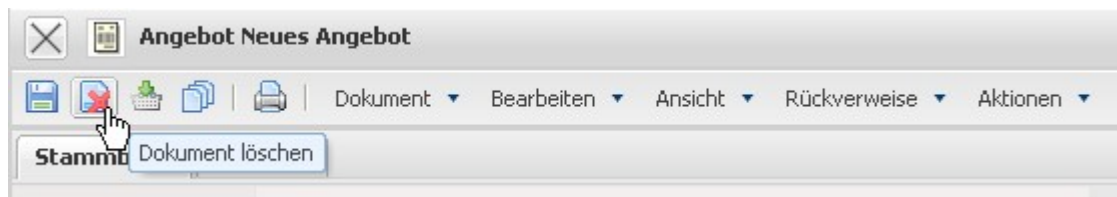
Finally various values are modified and the document is then saved.

<https://infodesire.net/dokuwiki/>

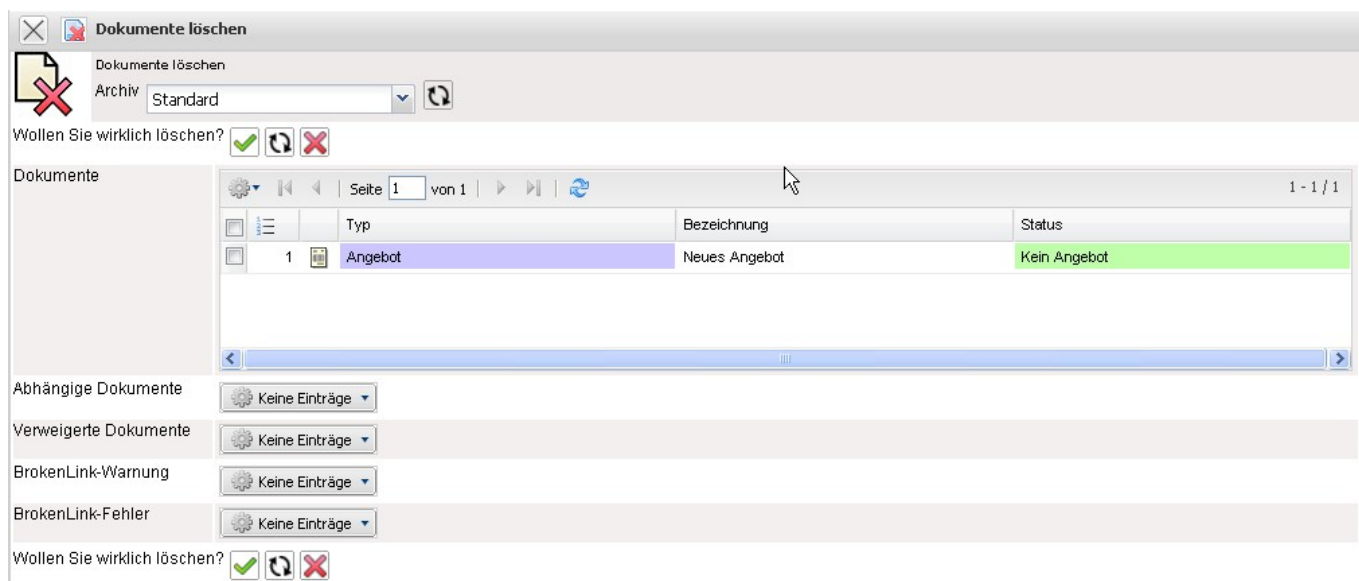
Printed on 2025/06/30 03:56

## Delete Document

If a document is not needed, clicking on ...

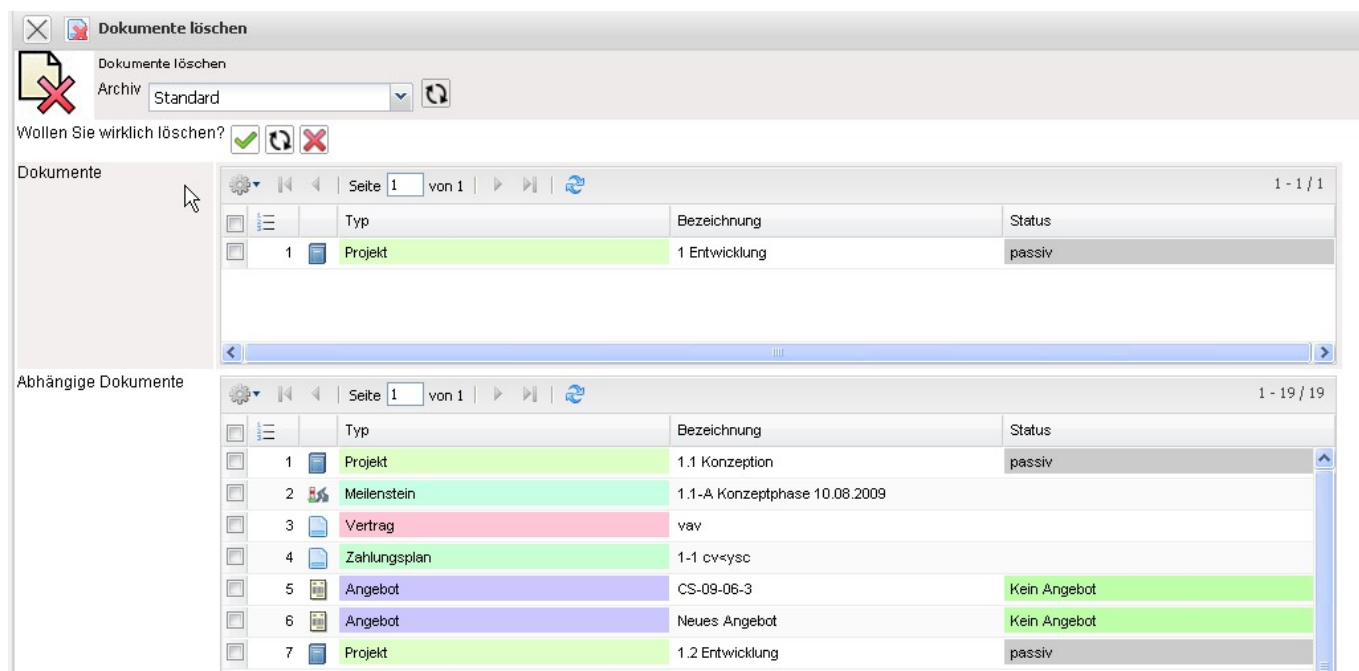


... deletes the document.



Before the document is deleted, a dialogue asking if the document should be deleted is displayed.

This dialog is a precautionary measure, as only selected users can reactivate this deletion process (see also trash/archive). If data with references are deleted (as in the project example), all data is displayed in the delete dialog, which will also be deleted.



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