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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 is active, showing fields for 'Offernumber' (3), 'Offer status' (No Offer), 'Project' (empty), 'Amount' (EUR), 'Value added tax' (MwSt-D-Voll 19), 'Offer total' (EUR), 'OfferCreator' (Conner Jane), 'Offer date' (15.10.2009), and 'Valid until date' (29.10.2009). The 'Offer lines' section is empty.

... 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.

Offer CS-09-10-5

Document Edit View Back references Actions

Master data

Misc

Offernumber

CS-09-10-5

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

History

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

Offer date

15.10.2009

Valid until date

29.10.2009

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

Offer CS-09-10-5

Document Edit View Back references Actions

Master data

Misc

Offernumber

CS-09-10-5

Offer status

No Offer

Project

2.1 Planning

Amount

0,00

EUR

Show this document in the navigator

Additional information

Document history

Show external url

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

History Project 1 Introduction Projectile 2.5					
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.

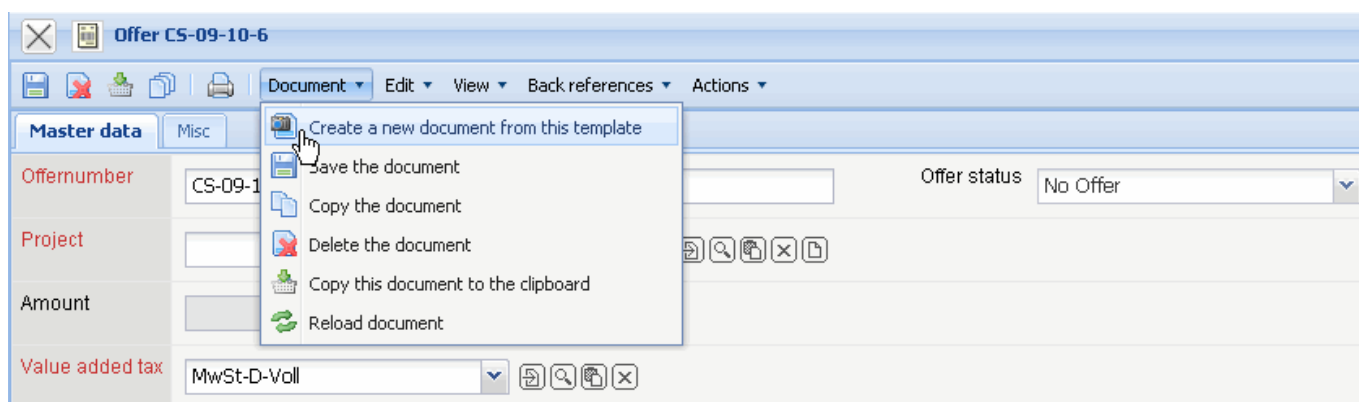
https://infodesire.net/dokuwiki/

Printed on 2025/12/08 05:40

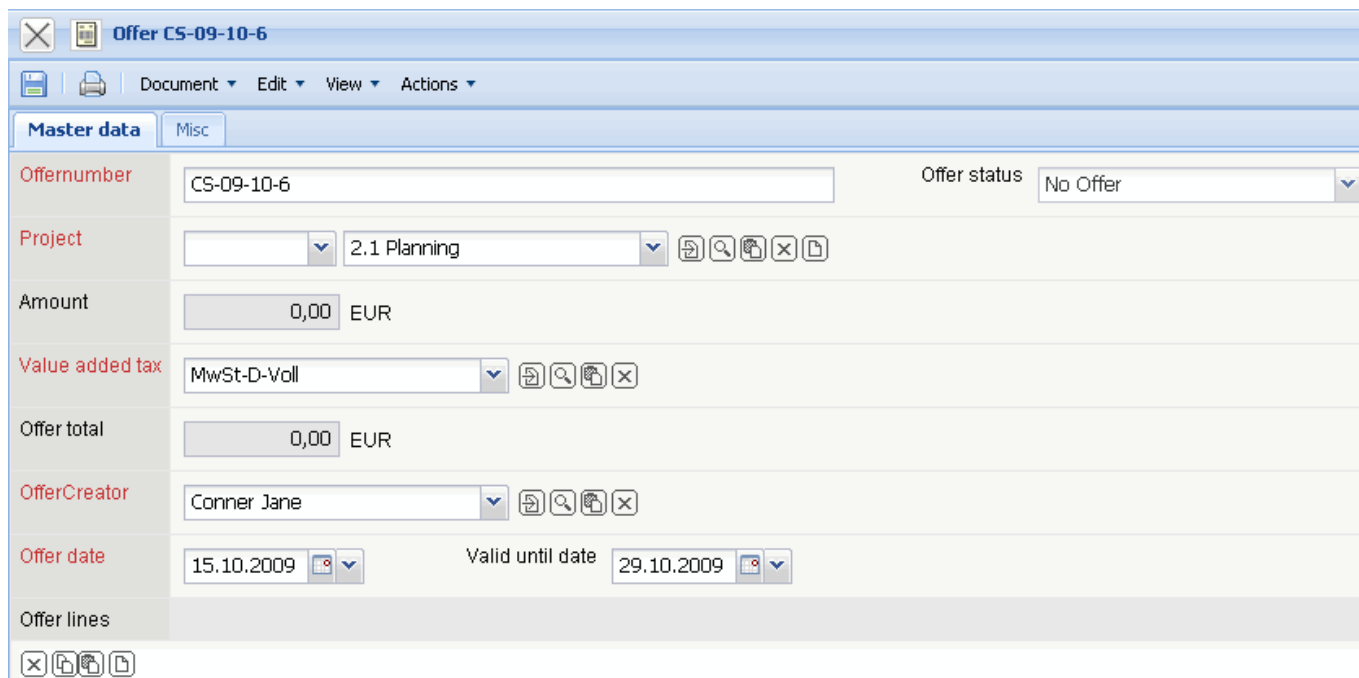
History Project 1 Introduction Projectile 2.5					
Age	Timestamp	History event	User	Details	Historic document
1 d 20:04 h	13.10.2009 16:02:48	Changed (1)	Conner Jane	...	
33 d 19:47 h	11.09.2009 16:20:07	Changed (1)	Hahn Katrina	...	
36 d 21:51 h	08.09.2009 14:15:28	Changed (2)	Hahn Katrina	...	
Field		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.



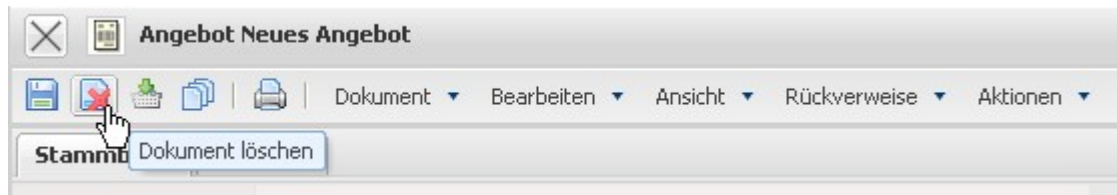
This functionality copies the existing document and pre-sets the default values. Here, offer 3 becomes offer 4.



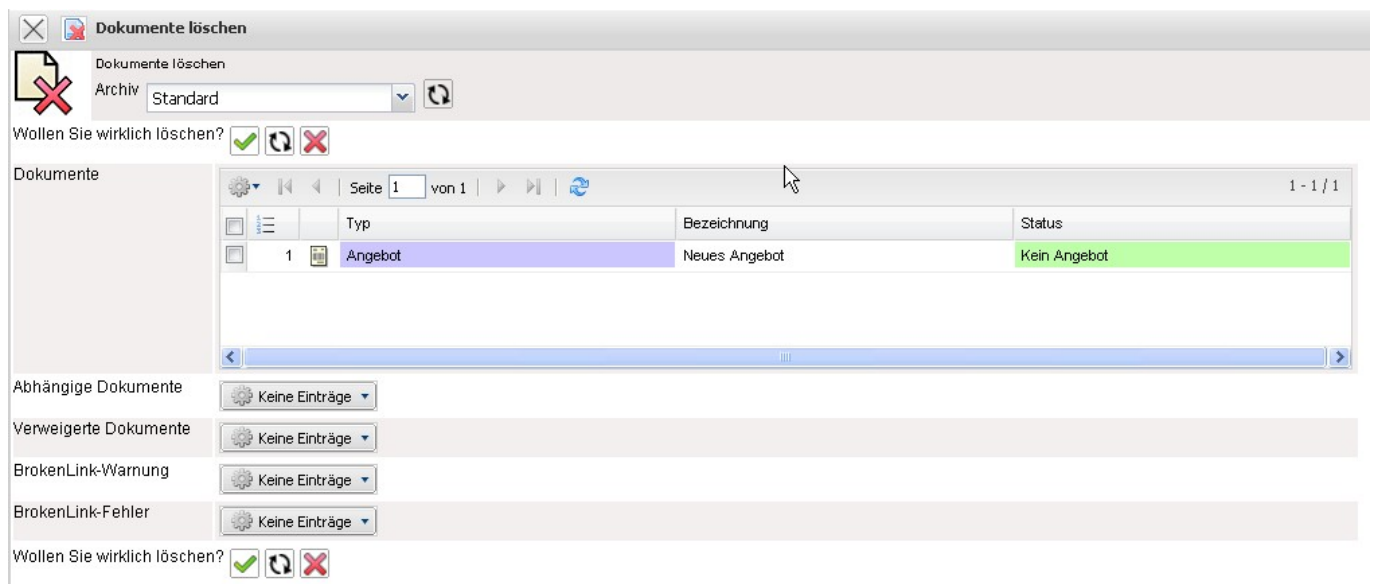
Finally various values are modified and the document is then saved.

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.

Dokumente löschen

Dokumente löschen

Archiv

Standard

Wollen Sie wirklich löschen?
☒
☐
☐

Dokumente

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	Typ	Bezeichnung	Status
1	Projekt	1 Entwicklung	passiv

Abhängige Dokumente

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	Typ	Bezeichnung	Status
1	Projekt	1.1 Konzeption	passiv
2	Meilenstein	1.1-A Konzeptphase 10.08.2009	
3	Vertrag	vav	
4	Zahlungsplan	1-1 cv<ysc	
5	Angebot	CS-09-06-3	Kein Angebot
6	Angebot	Neues Angebot	Kein Angebot
7	Projekt	1.2 Entwicklung	passiv

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