



Entity Number

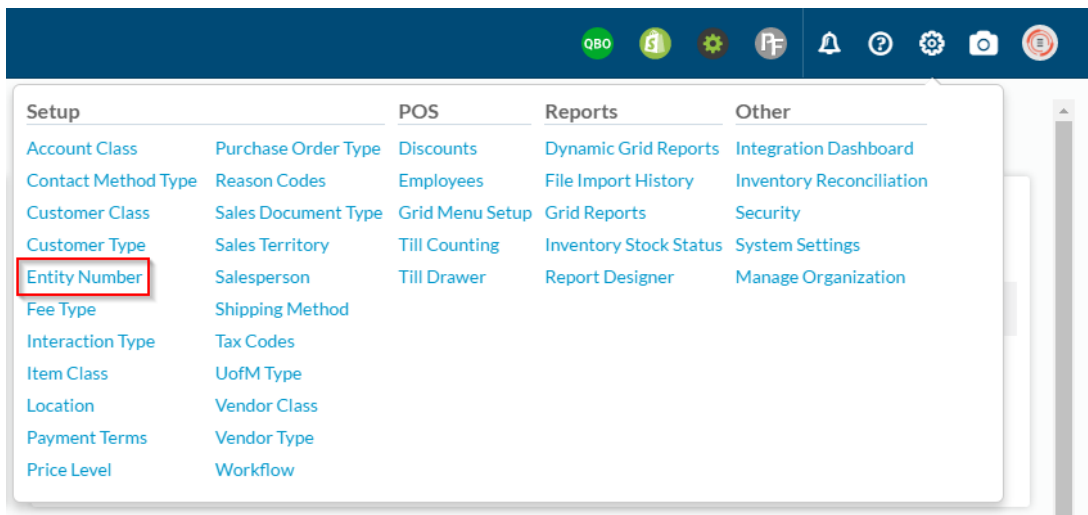
Megan De Freitas - 2024-12-02 - Settings

Overview


The Entity Number module of SalesPad Cloud allows you to edit the properties of SalesPad Cloud's built-in entities. Entities are the established pattern of letters and numbers that identify transactions or documents. For example, the estimate below has an entity defined by EST followed by 10 numerical digits.

 **EST0000000003** (Estimate)  

To get started, select **Entity Number** from the Settings menu.



The Entity Number grid displays all of the default entities and their current properties. To change the properties of an entity, click the **Edit** icon in the Entity Number Prefix column.

Entity Number Prefix		Entity Num Type
ST		Purchase_Order
SR		Sales_Document

The Edit Entity drawer will open. Here, you can edit the prefix (Entity Number Prefix), the number of digits permitted (Num Width), and the number the document will start with (Sequence Number).

As an example, if Num Width is set to 5 and Sequence Number is set to 1, the second transaction number (after 00001) would be 00002. If the Sequence Number was set

to 101, however, the second transaction number would be 00102.

Edit Entity



Entity Num Type

Purchase_Order

Entity Number Prefix

ST

Num Width

10

Sequence Number

15

Click **Save** when you're finished making your changes.