Quick Start: Setting Document Type on The Payables Interface

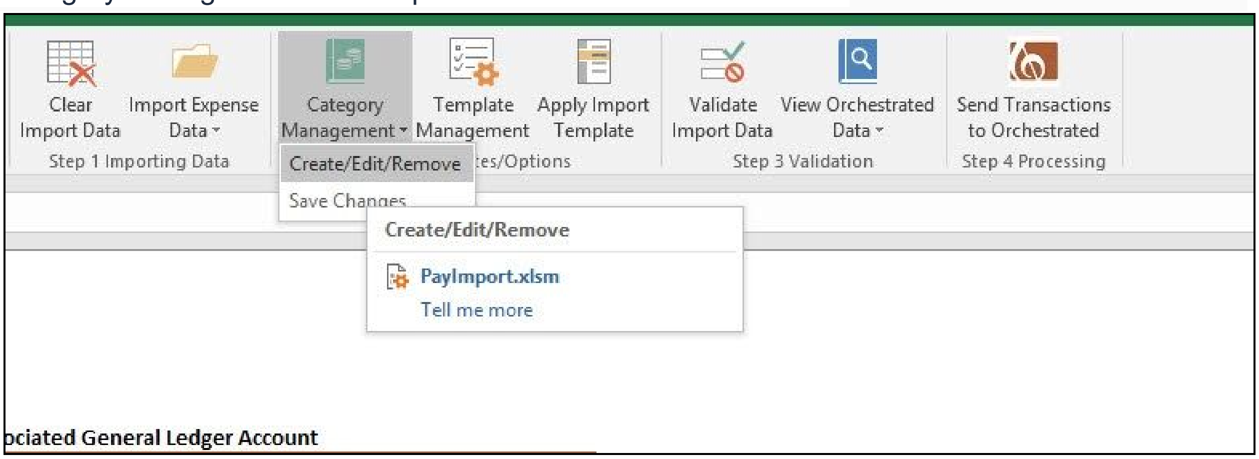
Summary

One of the most highly anticipated features to the 4.3 upgrade is the ability to mass import not just your A/P Invoices but a series of different documents. Because of customer feedback, the Payables Interface (located in your Modules Menu under Interfaces) now support the following:

- A/R Invoices & Credit Memos
- A/P Invoices & Credit Memos
- Inventory Transfer Requests
- Sales Orders

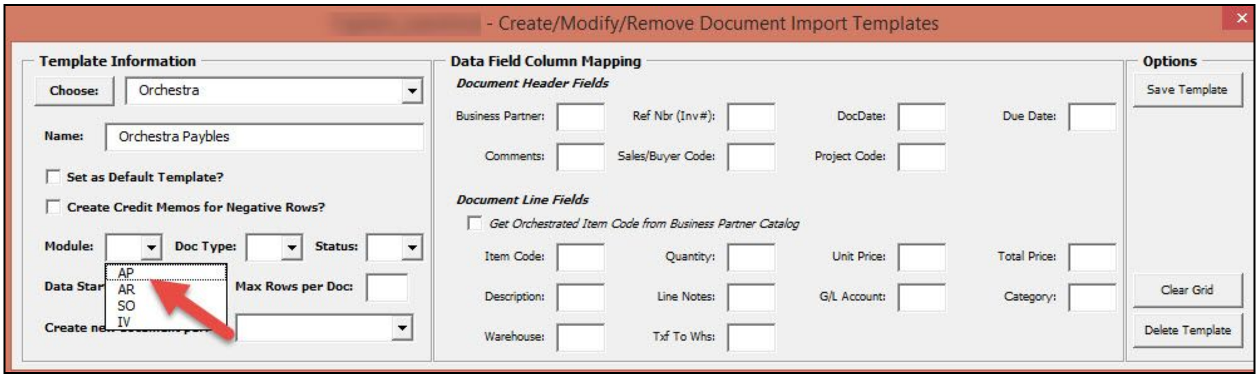
Step by Step Guide

To setup your Payables Template to use this feature, open up the Payables Import and Go to Category Management at the top and select Create/Edit/Remove.



Now you can choose an existing template or create a new one.

The document type will be under the Module option and you can choose your corresponding document type (the acronyms follow the name of the document itself). Now hit Save Template and you are good to go!



NOTE: Currently, a template can only support one document type, so you'll need to create a different template for each document type.