



Document Groups

SOP 117

Revision A, 10/30/2020

Approved by: Don Stanton

PURPOSE:

Document groups provide the ability to print multiple documents at one time. Document groups can be selected from the Report drop down list after clicking the Print button. There is also a Print doc group after shipment check box that can be checked during the Ship Sales Order process that will print the Document Group.

Document Groups can be set as a default on the Ship-to Defaults Tab on the Bill-to company record. New Ship-to companies will have the Document group field set on the Order Defaults Tab. If set on the Order Defaults Tab, the Document group field on the Misc 1 Tab of a Sales Order will be automatically filled in. The Document Group field can be manually set on the Misc 1 Tab when entering a Sales Order.

Document groups are not limited to the sales area, and can be created for purchase orders, formulas, and jobs via the "Type" field on the edit document group form.

PROCESS STEPS:

1. Navigate to Print Outs > Maintenance > Document Groups
2. Click "New" button in the header to create a new document group. The "Edit Document Group" window will appear.
3. In the "Edit Document Group" form, fill in the required fields:
 - a. Type – use drop down list to select the type of transaction this document group will be valid for
 - b. Name - enter a name that will identify the document group
 - c. Check whether it will be Active, Default, or whether to Consolidate print outs.
 - d. Click "Add" button to add a document to this group. The "Edit Document Item" will pop-up.
 - e. In the "Edit Document Item" window, select a Report OR Part Form from either dropdown.
 - f. Select a Document Category (optional) and Enter a Print When expression (optional to specify the condition of when this document will print).
 - g. Click "Next" to add another report or part form.
 - h. Once all reports/part forms have been added, click "Save" on "Edit Document Item" window.
4. Click "Save" on "Edit Document Group" form and exit.

REVISIONS

Rev	Date	Change
I/R	01/25/2018	New
A	10/30/20	Change to v.16