

Document numbering

System administration

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Document numbering

Control how invoices, orders and other documents are numbered.

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Overview

Each document gets a number such as `ACC-SINV-2026-00016`, built from a **naming series**: a prefix, the year and a counter. You can choose your own series, for example `INV-.YYYY.-.####`.

Prerequisites

The System Manager role.

Steps

Add a naming series

1. Search for **Document Naming Settings**.
2. Choose the **Transaction** (for example *Sales Invoice*).
3. Click **Get Options** to see the current series.
4. Edit the list: add your own, one per line, such as `INV-.YYYY.-.####`. In the pattern, `.YYYY.` is the year and `.####` is a four-digit counter.
5. Click **Update**.

Choose which series a document uses

1. On the new document, pick the series from the **Series** field at the top.
2. To make one the default, put it first in the list.

Change the counter

1. In **Document Naming Settings**, under *Update Series Counter*, choose the series and enter the **Current Value**.
2. Click **Update Series Counter**.

Practical example

The business wants invoice numbers like `INV-2026-0001`. The administrator adds `INV-.YYYY.-.####` to *Sales Invoice* and puts it first. New invoices are numbered in that style from now on.

Important notes

- Do not reset a counter to a number that is already used. It will clash.
- Existing document numbers do not change.
- For legal or audit reasons, avoid gaps and changes during the year. Ask your accountant.

Common mistakes

- Changing the series mid-year without telling the accountant.
- Setting the counter lower than the highest existing number.

Next steps

Read Backups, logs and security.

Related documentation

- Documents, DocTypes and records
- Custom fields and forms