Document genealogy

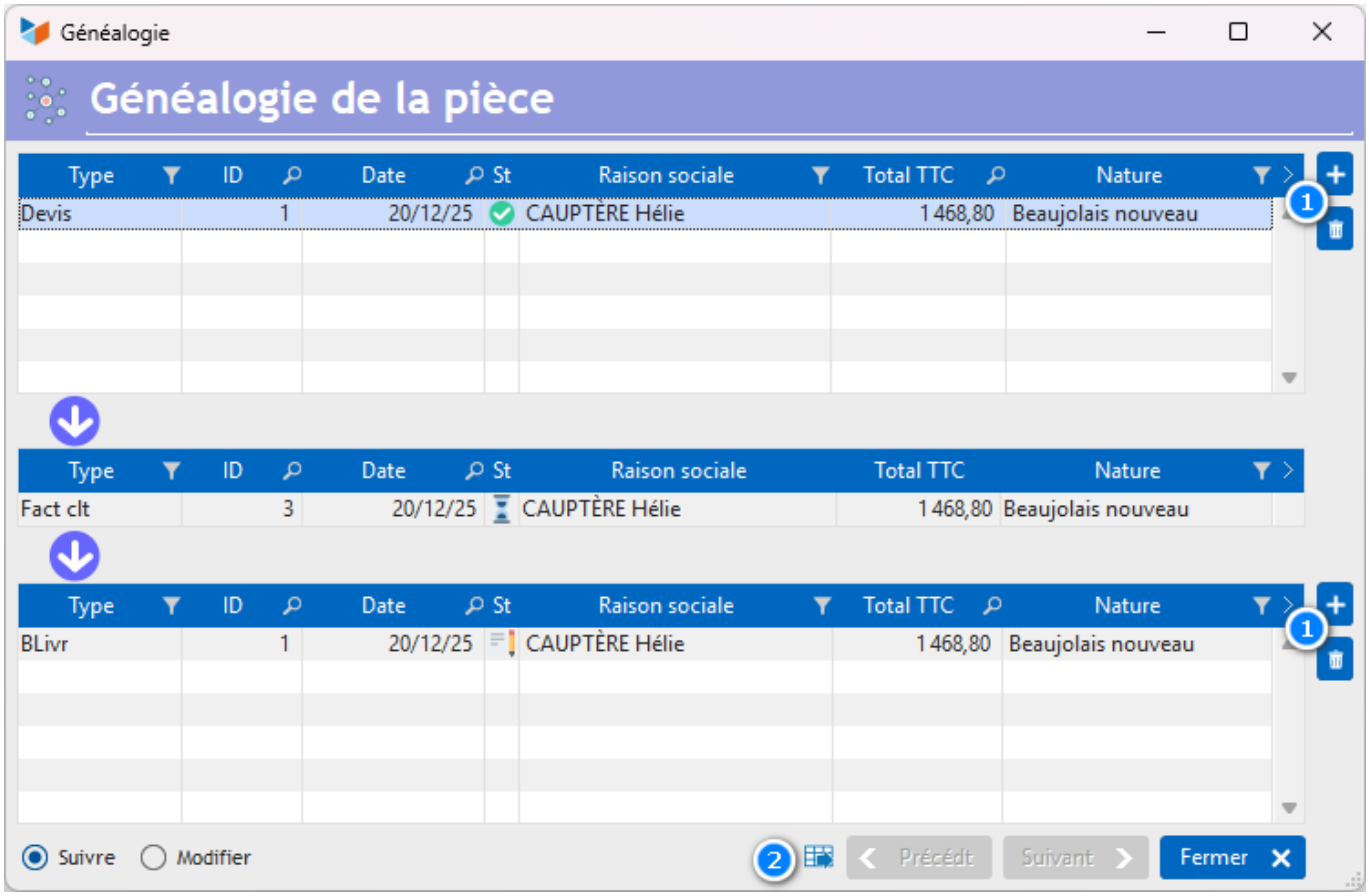
Fix Me! A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the forum.

This screen displays links between documents (invoices, quotes, etc.).

For example, it lets you know that such and such a quotation gave rise to such and such an invoice, and that the first of these invoices served as the basis for the creation of a new delivery note.

Using the screen

***Access the screen : **via the context menu of customer parts tables (quotes, invoices, etc.) or supplier parts tables (price requests, supplier invoices, etc.). Shortcut: Ctrl+G.*



On the screen above, you can see that invoice 10236 has been generated from quote 805.

On high and low tables, the effect of the double-click is different, depending on the selector:

- if the selector is on **Follow**, the selected part becomes the reference part, for which its “parents” and “children” will be displayed. In this case, the **Previous** and **Next** buttons are displayed, showing the route taken.
- if the selector is set to **Modify**, double-click to open the part being modified.

Genealogical links are generated automatically:

- when generating one part from another.
- in the case of automatic part generation, if the source part is different from the target part.

In the case of part duplication, no genealogical link is generated.

The buttons for adding and deleting genealogical links are reserved for administrators.

If at least one access is forbidden (for example, the user is not allowed to view quotations or supplier invoices), access to this screen is not permitted.



Other “Billing ” articles

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Last update: **2025/06/24 19:16**