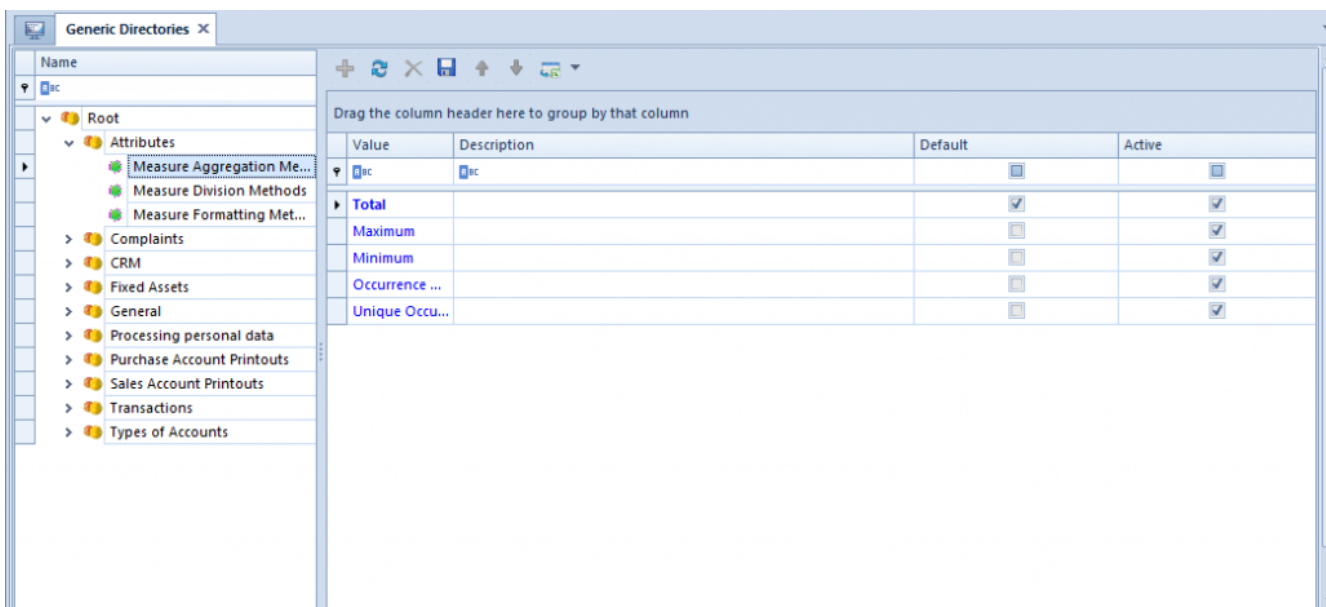


Generic directories – general information

Generic directories are registers of values defined for particular system objects. Such values can be reused in many system places and for many objects without being defined each time it is necessary.

The list of generic directories is available from the level of *Configuration* → *General* → *Generic Directories*.



List of generic directories

Directories are grouped into categories which are presented on a two-level list in the form of a tree structure. The names of categories indicate main functional areas of the system, within which particular directories are used. The categories are presented in alphabetical order.

The values defined for a directory highlighted on the tree are displayed on the list on the right side. Predefined values, which cannot be deleted, are marked in blue. Values added by the user are presented in black. Default values are presented in bold.

For the most of generic directories, the list of values is composed of the following columns:

- **No.** – ordinal number
- **Value** – defined directory values
- **Description** – additional information
- **Default** – parameter indicating whether a given value is default or not
- **Active** – parameter indicating whether a given value is active in the system

Values are added to a directory directly on the list, with the use of the button [**Add**], placed in *Values* group of buttons.

Note

Values of given directory must be unique. It is not possible to add two the same values to one directory.

The type of value depends on the type of given directory, which is defined during its creation or edition. Detailed description of a directory definition can be found in article <<Defining a generic directory>>.

Predefined list

Predefined generic directories are grouped by the functional areas in which they are used. Detailed descriptions of each generic directory can be found in articles dedicated to particular functional areas.

- <<Attributes

- CRM
- Processing of personal data
- Complaints
- Fixed assets>>
- Transactions
- Types of accounts
- Sales account printouts
- Purchase account printouts
- General

A part of this group is described in articles from <<*Trade and Warehouse*>> category. Other directories from this group:

- *Messenger Types* – directory values used in customer's contact data definition
- *Position Types* – values used when defining a contact person and specifying his/her association with a customer (*Administrator, Director, Employee* etc.)
- *Title Types* – titles used when defining a contact person, predefined values: *Mr., Ms.*
- *Academic Title Types* – values used when defining a contact person
- *Attachment Types* – values used when adding an attachment to an object. For an attachment type, the place of saving a file and maximum size, available extensions and the possibility of compression (*Yes, No* or option *Test* which allows for checking whether the result of file compression is satisfying) are defined
- *Cost Types* – values used in one of the BPM processes which specify types of cost related to business activity
- *VAT Rate Groups* – depending on the language of a database, parameters *Active* and *Default* are automatically checked for a given VAT rate group: *PL* – for database generated in Polish

language

UK – for database generated in English language

DE – for database generated in German language

AT – for database generated in German (AT) language

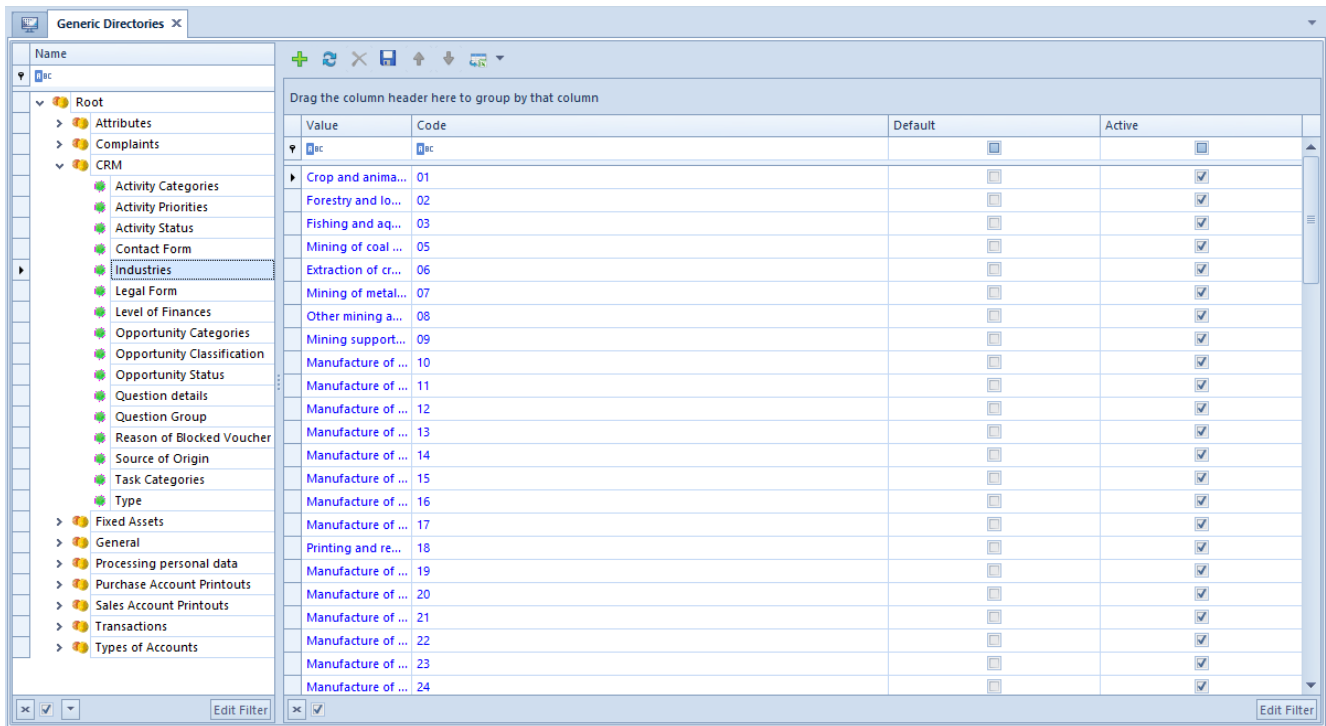
FR – for database generated in French language

ES – for database generated in Spanish language

Only one group of VAT rates can be set as default.

It is possible to activate selected groups at any moment and to change a default group setting. This directory is used for defining of VAT rates in a multi-company structure with regard to a company. Active directory values can be selected when defining a new center of *Company* type.

- *SAF-T Item Group (General directories group)* – values used on the form of CN code, retrieved from document item to JPK_V7M
- *SAF-T Procedure Code (Transactions directories group)* – values used on the form of CN code, retrieved from document item to JPK_V7M
- *Languages* – values used for objects for which it is possible to add translations, that is: attributes, items and directories. By default, the following languages are available in the directory: Polish, English, German, French, German and Spanish. A user can also add/delete new languages as well as modify names and activity status of the default ones. A deactivated language is not displayed on drop-down lists.
- *Institution Types* – used for defining new types of institutions in the system, e.g., City Hall or Customs Chamber. <<CRM>>.



List of generic directories – CRM group

Hint

In French language version of the system, there is also a dedicated directory Marking on Printouts, which refers to documents for released items only.

Defining a generic directory

To add a new generic directory, it is necessary to highlight a directory group on the tree and select the button **[Add]** from the *Directories* button group.

Generic directory form

On a new generic directory form, the following data must be defined:

- **Group** – non-editable field indicating a group to which the directory is being added
- **Name** – mandatory field, can contain up to 50 characters
- **Field for changing translation language** – function of selecting language of translation of the directory name and its value

After entering the name in the system language, the user selects another language in the list and inserts appropriate value in the field *Name*. Translations of the names of predefined directories are available in supported languages, that is in English, German, French and Spanish. An entered translation can be deleted by removing the value entered in the field *Name*.

The names of the values of directories are translated in the same way. After changing the language in the selection window, the field for values subject to translation in the section *Directory Values* are highlighted in yellow. The option of translating is available for the values of *Text* type only.

Translations can be added in languages which are available in

Languages generic directory.

Note

It is not possible to delete translation in the system language, that is in the predefined database language.

- **System** – non-editable parameter, checked only in case of editing a predefined generic directory
- **Value Type** – indicates the format of entered value A user can select one of predefined types:
 - *Text*
 - *Real Number*
 - *Integer*
 - *Logic Value* – checked/unchecked parameter
 - *Natural Number*
 - *Date* – in the form of mm-dd-yyyy. This field is active as long as the first directory value is added. Value type can be changed not until all its values are deleted.
- **Directory Values** – list of values of defined directory. Values are added in the same way as they are added from the level of the list of generic directories. In the case of editing an existing system directory, this section is completed with predefined

Note

Values of given directory must be unique. It is not possible to add two the same values to one directory.

Note

It is not possible to add several generic directories with the same name.