

[75.1 Release] Document Type Setup (Setup) - Enhancements to Screen (18766)

Last Modified on 08/19/2025 8:11 am PDT

The Document Type Setup screen has been updated to allow settings to be edited directly from the grid. Previously, changes could only be made through the Update Document Type popup editor, accessed by double-clicking the document type row.

Only the highlighted columns can be edited from the grid.

DOCUMENT TYPE SETUP									
FORM TYPE									
All									
ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE	IS TEMP	PRE-AUTHORIZATION	APPROVAL	CHECK LIST TYPE	ACTIVE
1	A-New Service	Proposal	ADD-Add Svc - New Service	No	No	Not Required	Require Review & Approval for al...	Inspection	Active
11	A-New Service-noPreAuthAuto a...	Service Contract	ADD-Add Svc - New Service	No	No	Not Required	Require Approval for all Docume...	Inspection	Active
21	A-New Service	Services Change Form	ADD-Add Svc - New Service	No	No	Not Required	No Review or Approval Required		Active
36	Chg Svc-Price Decrease	Proposal	CHG-Price Decrease	Yes	No	Not Required	No Review or Approval Required		Active
48	Chg Svc-Price Decrease	Service Contract	CHG-Price Decrease	Yes	No	Not Required	Require Approval for all Docume...		Active
60	Chg Svc-Price Decrease	Services Change Form	CHG-Price Decrease	Yes	No	Not Required	No Review or Approval Required		Active
78	Chg Svc-Price Increase	Proposal	CHG-Price Increase	Yes	No	Require / one authorization for D...	No Review or Approval Required		Active
79	Chg Svc-Price Increase	Service Contract	CHG-Price Increase	Yes	No	Not Required	No Review or Approval Required		Active
80	Chg Svc-Price Increase	Services Change Form	CHG-Price Increase	Yes	No	Not Required	No Review or Approval Required		Active
81	Chg Svc-Service Decrease	Proposal	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
82	Chg Svc-Service Increase	Proposal	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
83	Chg Svc-Service Increase	Service Contract	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
84	Chg Svc-Service Decrease	Service Contract	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
85	Chg Svc-Service Decrease	Services Change Form	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
86	Chg Svc-Service Increase	Services Change Form	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
87	End Svc-End Svc	Services Change Form	END-End Service	No	No	Not Required	No Review or Approval Required		Active

Pathway: Setup > Document Formats > Type