

Overview

Through the **document definition** in *Surface Solutions*, you can control the contents of all automatically generated documents within your organization.

Here you define **how invoices, offers, orders, and emails look**, which information is included by default, and how number ranges or tax rates are assigned.

This ensures that all documents – regardless of which user creates them – are **generated consistently, correctly, and in the desired corporate design**.

With the document definition, you can:

- Centrally define your organization's **logo, PDF background, and contact information**.
- **Define number ranges** for different document types (invoices, credit notes, offers, orders).
- **Manage tax rates and VAT notes**.
- **Configure standard positions** for offers to automatically print surcharges or overarching costs.
- **Manage text elements** such as payment terms, delivery terms, footers, and general notes.
- **Store standard texts and attachments for emails**, including CC recipients and signatures.

The document definition is modular and divided into several sections:

1. [Document Definition for Invoices and Credit Notes](#)

Here you define all contents, layouts, and logics that apply to **invoices, cancellation invoices, and credit notes**.

In addition to general information such as logo and background, you can configure **tax rates, number ranges, and legal notices**.

2. [Document Definition for offers](#)

In this section, you define which information and layouts are used for **offers**.

A central element is the **standard positions**, which allow you to automatically print additional surcharges or summary values such as *material costs, setup costs, or color changes*.

3. [Document Definition for Orders](#)

Here the **standard information for orders** is maintained – such as sender, billing, and delivery addresses, delivery terms, and general notes.

Additionally, you can individually define the **number range for orders**.

4. [Document Definition for Emails](#)

In this section, you control the **standard texts and attachments** for emails used when sending documents.

You can define subject, message, CC recipients, and standard attachments per document type. Additionally, a **personal email signature** can be set for each user.

By combining these four sections, the **document definition** provides a comprehensive solution to **standardize all business documents in Surface Solutions in terms of content, visuals, and structure.**

This gives you full control over the appearance of your documents while ensuring **consistent processes and legal compliance** across the organization.

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