Mariner Software

After I change a receipt's document type to something other than Receipt, why can't I change the amount value?

Jim Henson - 2018-12-17 - Managing Library Items and Metadata

After I change a receipt's document type to something other than Receipt, why can't I change the amount value?

In list view or cover flow view, you might notice values in the Amount (or other metadata fields) for documents, contacts, or other document types that you did not expect to see. There are two ways to change (or remove) values like these: change the document's type to one that the field is displayed for, or assign the field the value appears under to the document's current type (and remove the value from the field once it is displayed). Paperless 2 and 3 handle some key things differently than Paperless 1.x did:

- Both Receipts and Documents (as well as other document types) can be stored in the same library.
- Any field can be displayed or hidden in the document details (metadata) pane, on the right-hand side of the library window.

Because of this, if metadata was entered for a document under a specific field and the document's type is switched to a different document type (that the field is not assigned to), the metadata will still exist in Paperless (under the field), but it will not be accessible unless the field is made visible for the document type that has been assigned to the document in Paperless. There are two ways to resolve this issue:

- **Change the document's type to one that the field is assigned to.** For example, if you would like to remove an amount value from a document with the Contact document type:
    1. Change the document type to Receipt (since Amount is assigned to Receipt by default).
    2. remove the value from the Amount field.
    3. change the document type back to contact.
- **Assign the field to the document type; then remove it once data is edited completely.** For example, for the same Contact with a value in the Amount field, assigning the Amount field to the Contact data type will make it possible to edit (or

delete) the value in Amount for the Contact.