



TIP OF THE MONTH



PRINTING IN FORMPAK

Printing in Formpak

Did you know there are various ways to print and generate documents for customers within Formpak?

Print a Document for an Item - Print a single document or label for an item, company is optional. You can email documents from this option.

Print a Document for an Item - TEST (DB2 V10.5)

On this page you can print an individual document.

Print a Document for an Item

Item: [Empty]
Document Type: [Empty]
Document Created: [Empty]
Document Version: [Empty]
Document Version Date: [Empty] E.g. d/m/yyyy
Company: [Empty]
Application: [Empty] Dosage: [Empty] %
For Dilution: [Empty]
Base Item: None
Cross Reference: [Empty]
Item Supply Type: Sale / Normal Sample
Record Supply: Yes No
TO: DEFAULT
Language: Default
Copies: [Empty]

You can print an Item 'For Dilution'. This allows you to generate a version of a Label or Safety Data Sheet for a product diluted to a specified percentage. This 'diluted' document could, for example, be sent to a candle customer so they could see the amount of the fragrance dilution in relation to their product.

Print a Document for an Item - TEST (DB2 V10.5)

On this page you can print an individual document.

Print a Document for an Item

Item: FF00001 FRAGRANCE JASMIN
Document Type: CLP Safety Data Sheet (Banded)
Document Created: [Empty]
Document Version: 3
Document Version Date: 01/09/2022 E.g. d/m/yyyy
Company: C/FUSSY Fussy Customer
Application: Candle Dosage: 10 %
For Dilution:
Base Item: CANDLE WAX
Cross Reference: No Cross Reference
Item Supply Type: Sale / Normal Sample
Record Supply: Yes No
TO: DEFAULT
Language: Default
Copies: 1

To print a Document 'For Dilution'

1. Select your Item and Document Type

2. Tick **For Dilution** box
3. Enter an **Application** and **Dosage**
4. If the entered application has an item associated with it this will be displayed in the Base Item field. Otherwise, this will say None
5. Press **Preview** to generate your document at the dilution entered. (It is only possible to 'Preview' the PDF as the dilution formulation is effectively temporarily created. The preview is a PDF but has no version number)

You can associate an application, e.g. candle or reed diffuser with a Base Item (e.g. an item which represents the formulation for a candle base or a raw material which represents a reed diffuser base). Then, when you use 'For Dilution' the associated base item will be used as the diluent. This is particularly useful when the base should influence the document because it contains components which have a regulatory significance.

To associate an item with an application:

1. Go to **Add a New Application**
2. Enter **Code** for example 'WAX'
3. Enter **Name** for example 'Candle Wax'
4. Select **Base Item** for example 'Paraffin Wax'
5. Click **Save**

You will now be able to select this application and use this item by default within 'Print a Document for an Item'.

In 'Print a Document for an Item' you also have the option to:

Print which will allow you to print from your local printer if you have the relevant functionality set up. Please select the link on how this can be achieved [Local Printing](#).

Select Printer allows you to select which local printer you want to print from.

Email PDF generates a PDF copy of the document for you to email. The emailing from Formpak functionality must first be set up. Please contact us at support@formpak-software if you require assistance with this.

Print to PDF generates a PDF of the document.

Preview enables you to view the document without printing a full version. This is useful to view the appearance and content of a document. Preview is also useful when you are prevented from using the usual print functions if the document is invalid or properties are not determined.

Print Later generates a PDF copy of the document so it can be added to 'Manage Documents Required' to be printed later. This can be useful if you have a lot of documents to send to one customer.

Export allows you to export documents to a Scope (integrated system).

New Cross Reference enables you to add Cross References which are codes and names which can be given to your products, so customers are not informed of your internal codes and names.

Documents Supplied opens a new window 'View Documents Supplied', here you can input the relevant search criteria required and search for documents that have been previously supplied.

Documents Required opens a new window 'Manage Documents Required'. This is where you can locate the documents you requested to Print Later. Formpak automatically creates new versions of previously created documents and determines which customers require them using [Document Supply Conditions](#). For example, a Safety Data Sheet may be required to be updated if specific properties and values change, but only send updated versions to customers who have received a sample or order in the last 12 months.

Additionally multiple documents can be printed for the same Item using:

Print Documents for a Company you can print multiple documents and labels for the same item, a company is required, and the documents are generated in a zip file.

The screenshot shows the 'Print Documents for a Company - TEST (DB2 V10.5)' window. At the top, there is a menu bar with options: 'Add to List', 'Delete from List', 'Clear List', 'Print', 'Print to PDF', 'Preview', 'Print Later', 'New Cross Reference', 'Cancel', and 'Help'. Below the menu bar, a message states: 'On this page you can print documents for a company.' The main area contains a 'Documents to add' section with the following fields: 'Company' (text input), 'Item' (text input), 'Document Type' (dropdown menu), 'Application' (text input), 'Cross Reference' (dropdown menu), 'Dosage' (text input with a '%' symbol), 'Item Supply Type' (radio buttons for 'Sale / Normal' and 'Sample'), 'Record Supply' (radio buttons for 'Yes' and 'No'), 'TO' (dropdown menu), 'Language' (dropdown menu), and 'Covering Letter' (dropdown menu). There is an 'Add from Basket' button. At the bottom, there is a 'Documents to print' dropdown menu.

Multiple documents can be printed for the multiple Items using:

Print Documents and Labels you can print multiple documents and labels for multiple items, a company is required and documents are generated in a zip file.

The screenshot shows the 'Print Documents and Labels - TEST (DB2 V10.5)' window. At the top, there is a menu bar with options: 'Add to List', 'Delete from List', 'Clear List', 'Print', 'Print to PDF', 'Export', 'Cancel', and 'Help'. Below the menu bar, a message states: 'On this page you can print documents and labels.' The main area contains a 'Documents and Labels to Add' section with the following fields: 'Project' (text input), 'Task' (text input), 'Company' (text input), 'Item' (text input), 'Cross Reference' (dropdown menu), 'Has Project Properties' (checkbox), 'Sample Quantity' (text input), 'Number Required' (text input), 'Application' (text input), 'Document Type' (dropdown menu), 'Ad Hoc Parameters' (text input), 'Record Supply' (checkbox), and 'Select a supply type' (dropdown menu). There are 'Add from Basket' and 'Generate Cross References' buttons. At the bottom, there are fields for 'TO' (dropdown menu), 'Language' (dropdown menu), 'Covering Letter' (dropdown menu), and 'Invoked from' (text input). There is also a 'Documents and Labels to Print' dropdown menu.

Mini Tip

Print Alternative Item

This option enables you to specify in an Item, which Item you want to generate and print the Safety Data Sheets and labels for. For example, you have created a blended essential oil Formulation, but require the SDS and labels to display the required information as if it was a Raw Material.

The screenshot shows the 'Modify a Formulation' web interface. The 'Key Details' tab is active, displaying various fields for a formulation named 'Lemon'. The 'Print Alternative Item' field is highlighted in yellow. The interface includes sections for 'Information', 'Key Details', and 'Properties'. The 'Print Alternative Item' field is located in the 'Properties' section, below the 'Standard Cost' and 'Calculated Cost Price' fields.

Navigate to 'Modify a Formulation' or alternatively 'Modify a Raw Material'.

In the Print Alternative Item field on the Key Details Tab input the Item Code/Name of the Item you want the documents to print/generate for instead of the original Item. Select Save.

Now when you print the documents for the original Item the documents will be generated for the Item that has been inputted into the 'Print Alternative Item' field.