

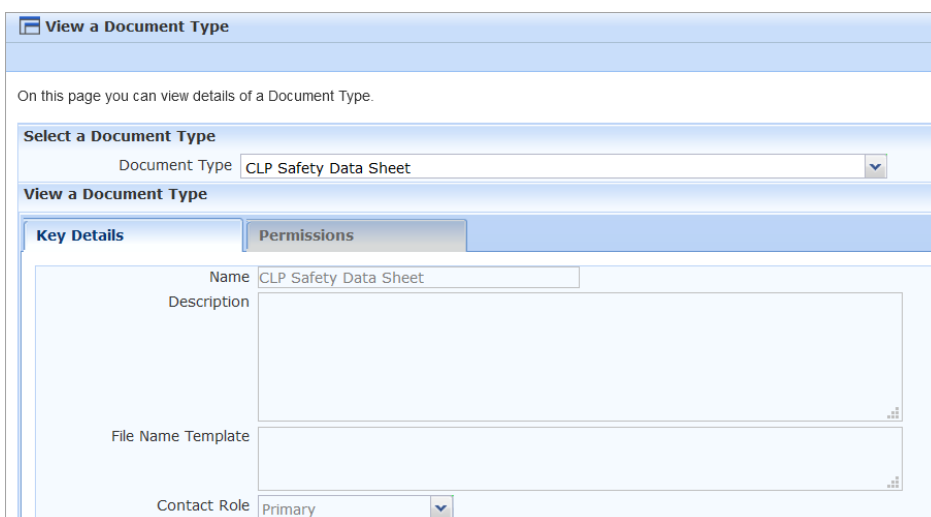
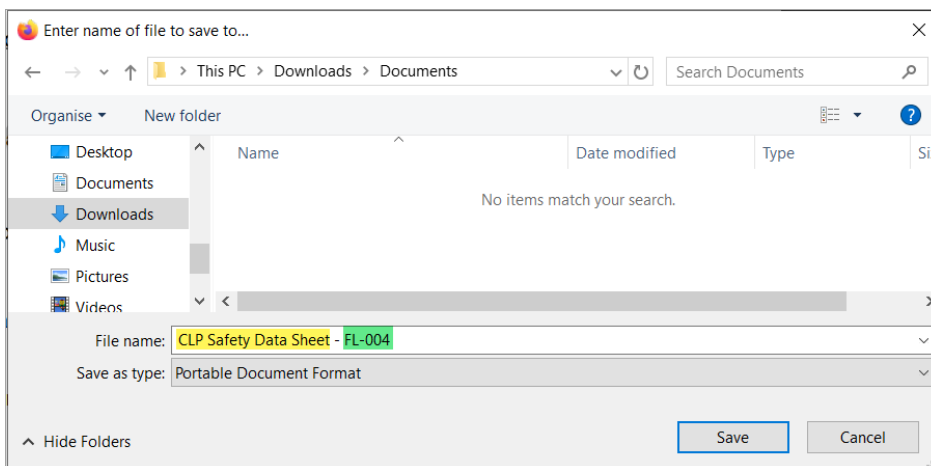


Changing the Name and File Name of a Document

Within Formpak you can change the name of a Document and the File Name when saving.

For this example, a CLP Safety Data Sheet is being saved for Item FL-004.

In **View a Document Type**, we can see that the Name of the Document is 'CLP Safety Data Sheet'. The **File Name Template** field is blank, so the default file name will be the Document Type (Name) and the suffix Code.

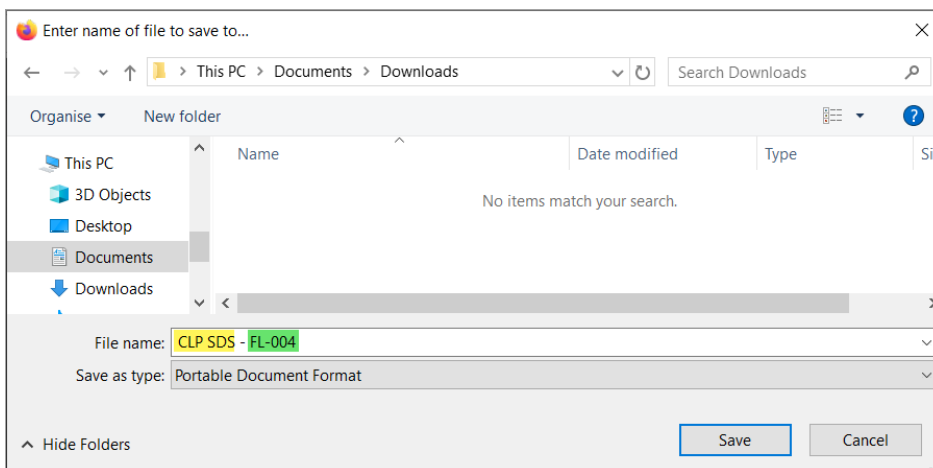


To change the name of the Document:

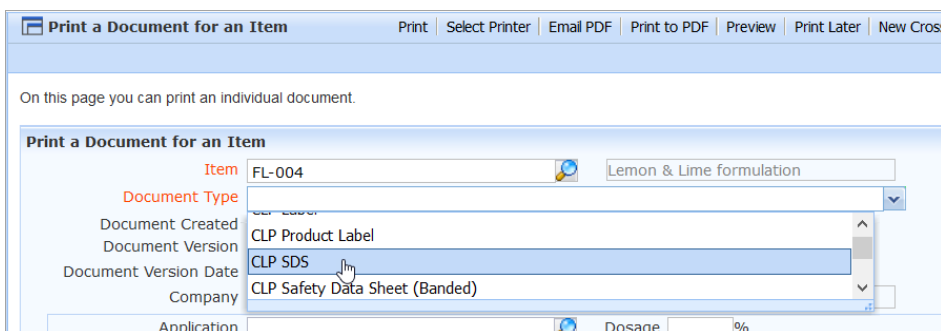
1. Go to **Modify a Document Type**
2. Select the **Document Type** you would like to change the name of from the drop down list.
3. Change the document name, in this example the name has been changed to CLP SDS. Note: this will also change the Document Name in the drop down list in **Print Document for an Item**

4. Click Save

When creating the Document in **Print Document for an Item** and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the updated name and Code.



The Document is also renamed in the list for **Print Document for an Item**.

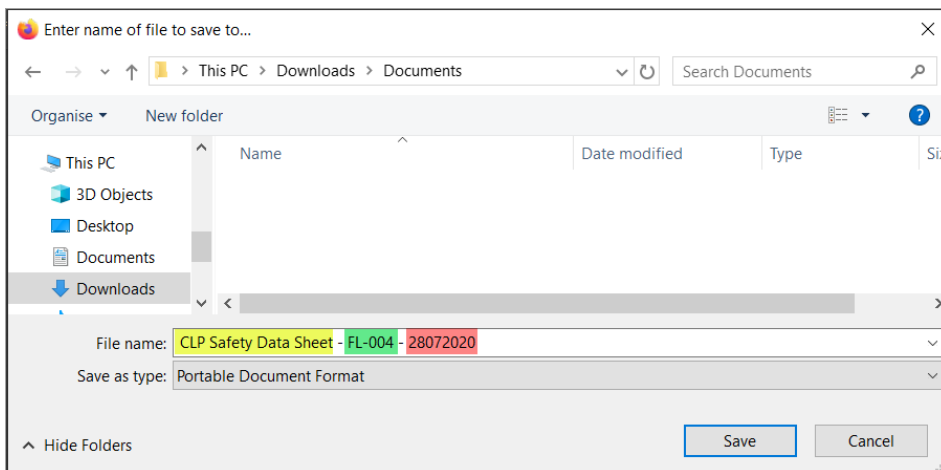


To add suffixes to the File name:

1. Go to **Modify a Document Type**
2. Select the **Document Type** you would like to change the name of from the drop down list.
3. Enter the chosen fields in the **File Name Template** field – In this example the Document Type, Code and Date are required

4. Click Save

When creating the Document in **Print Document for an Item** and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the required suffixes.



Below are the different suffixes which can be added to the File Name Template:

- <DocumentType> Name of Document type
- <Code> Code of Item / Cross Reference
- <Name> Name of Item / Cross Reference
- <Version> Document version
- <VersionDate:> Version date, you can specify date format after ':',
e.g <VersionDate:MMdd> or <VersionDate:ddMMYYYY>
- <Date:> Document created date, you can specify date format
- <ApplicationName> Name of Application
- <Dosage> Dosage(s) of Application
- <RegionCode> Code of Region
- <LanguageCode> Code of Language

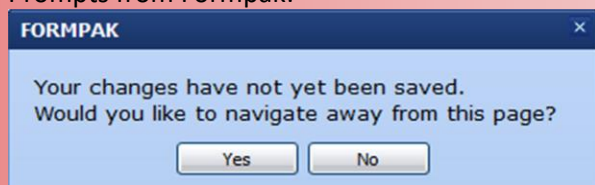
Please click this [link](#) to see the related Support Centre Article for more examples, date formats, language, and region codes.

Mini Tip

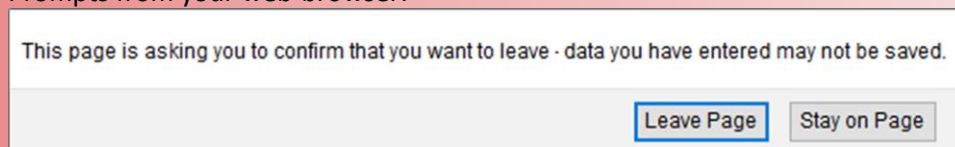
When exiting from Formpak, try not to exit Formpak pages without saving. If you ignore prompts about saving work, it may mean your work is lost.

If you are in the CDT developing your Formulation and do not save, your formulation will go into a 'Work in Progress' state.

Prompts from Formpak:



Prompts from your web-browser:



To see previous 'Tip of the Month' articles, please see [here](#).

All of our training and support material can be accessed from our **Support Centre**. The Support Centre is available 24/7 and is a great resource to use at your convenience. It includes:

- Over 100 training and support articles
- Links to training videos
- Quick Start Guides
- The Formpak Training Matrix

The Support Centre can be accessed on the Home screen of Formpak software or via the following link:

https://www.formpak-software.com/Support_Centre/Pages/Support_Centre.html

Our **Support Team** are available:

Monday - Thursday: 8:30 - 17:00 (GMT)

Friday: 8:30 - 16:00(GMT)

Email: support@formpak-software.com

Telephone: +44 (0) 1235 250 020

The Formpak **Help Centre** is included directly in Formpak software, just press the 'Help' button to access it. The Formpak Help Centre offers explanations for each function of the application as well as a glossary of the technical terminology used.

View our **YouTube** channel with lots of helpful guides and information about Formpak

<https://www.youtube.com/user/FormpakSoftware/videos>