



TIP OF THE MONTH



HOW TO GENERATE ALTERNATE COMPANY DETAILS IN DOCUMENTS

Print Safety Data Sheet containing alternate company (TO) details:

You may want to print documents, e.g. a Safety Data Sheet, so that the company and contact details are from an alternate company. You may want to do this if your company produces Safety Data Sheets for your other divisions or sites. To print documents containing other company details, including company name, address, contact and logo involves the following steps:

- **Add a New TO** – to enter the key details of the alternate company
- **Add TO logo** - to upload the logo of the alternate company
- **Adding new document content** - this is necessary if the document contains TO specific content. You can link the document, TO and company together so the right company details appear when needed for the right customer.

TIP: Although this guide relates to Safety Data Sheets, the basic process is the same for any document.

Process for adding a New TO

1. Go to **Add a New TO**
2. Enter a **Code** for the TO e.g 'FORM'
3. Enter **TO Name** e.g 'Formpak'
4. Add address and any other relevant details for the TO

Add a New TO - DS

On this page you can add a new TO.

Key Details | **Contacts** | **Related Parties** | **Account Managers**

Code FORM **Alternative Code**

Name Formpak

Is default

Status Active Inactive

Party Class Target Organisation

Category

Address The Exchange, Colworth Park
Sharnbrook
Bedfordshire
MK44 1LZ

5. Click the **Contact** tab
6. Click **Add New Contact**
7. Fill out the relevant details of a contact within the company
8. Click **Save** to save the contact
9. Click **Save** again to save the new TO

Key Details	Contacts	Related Parties	Account Managers
Contact Name		Contact Roles	
Mrs P Williams		Primary	
Contact Details			
Name	Mrs P Williams		
Title	Director		
Company Name	Formpak Software		
Address	[Add alternative site address]		
Region	English (United Kingdo		
Language	---None---		
Phone Number	+44 01235 250 020		
Fax Number			
Email Address	support@formpak-software.com		

Process for adding a Company logo to a TO

1. Go to **Modify a TO**
2. Select **TO** = enter 'Company name'

Modify a TO - DS	Save
On this page you can modify a TO.	
Search for TO	
TO	Formpak Limited
Modify a TO	

3. Select the **Attachments** tab
4. Click **Add Attachment**
5. Select **Attachment Type** = Logo
6. Enter **Name** = insert 'Logo Name'
7. Click **Browse** and select the logo file (Must be PNG format, 400-600 x 150-200 pixels)
8. Click **Save** to save the Attachment
9. Click **Save** to save the TO

Add a New Attachment - DS	Save	Cancel	Help
On this page you can add a new Attachment.			
Add a New Attachment			
Company	DEFAULT	Formpak Limited	
Attachment Type	Logo		
Name	Formpak Logo		
Description			
File	Choose file	FP_Logo_Red.png	

Process for adding new document content for a document

This step is only needed if the document contains TO specific content, for example, the Safety Data Sheet where at the bottom of each page there is an abbreviated company address. To change this specific content:

1. Go to **Manage Document Content**
2. In **Document Design** select document e.g 'CLP Annex II SDS(2)'
3. Click **Add New Content**
4. Enter Code 'bottomCompany.'" followed by the Code for the TO e.g. 'bottomCompany.FORMPAK'
5. Enter the Name and Address into the Content as a single line
6. Click **Save**

Manage Document Content - DS - Google Chrome

Not secure | new.formpak.net/formpak/action/document/manageDocumentContent?do=create

Manage Document Content - DS Save Cancel Help

On this page you can add new document content.

Add a New Document Content

Code: bottomCompany.FORMPAK

Description:

Content: Formpak Software, The Exchange Colworth Park, Sharnbrook, Bedfordshire, MK44 1LZ

You have added Document Content successfully.

Code:	bottomCompany.FORMPAK
Description:	
Content:	Formpak Software, The Exchange Colworth Park, Sharnbrook, Bedfordshire, MK44 1LZ

Process to generate a document with alternate company details ad hoc

In Print a Document for an Item, select an alternate TO, and then print the document.

Print a Document for an Item - DS Print Select Printer Email

On this page you can print an individual document.

Print a Document for an Item

Item: []

Document Type: []

Document Created:

Document Version: []

Document Version Date: [] E.g. d/m/yyyy

Company: []

Application: [] Dosage: [] %

For Dilution:

Base Item: None

Cross Reference: []

Item Supply Type: Sale / Normal Sample

Record Supply: Yes No

TO: GREENFORM

Language: []

Copies:

Code	Name
GREENFORM	Green Formpak

Note that you can also select alternate TO's in Print Documents and Labels and in Print Documents for a Company

Process to automate generation of documents with alternate company details

This requires a link between the alternate company, the intended recipient (usually customer) and the document type.

Process for linking document, alternate company and customer together

Documents are printed for companies, usually customers. You can specify which customers receive the alternate document in the following way:

1. Go to **Manage Document Requirements for Party**
2. In **Party** enter the code of the company / customer who requires documents from the alternate TO
3. Click **Add**
4. Select **Document Type** and select the document you want to link e.g 'CLP Safety Data Sheet'
5. In the **Sender** box select the TO code
6. Click **Save**

The screenshot shows the 'Modify Document Requirements for Party' form with the following fields and values:

Party	Big Customer
Document Type	CLP Safety Data Sheet
Document Supply Condition	---None---
Supply Condition Priority	800
Document Design	---None---
Design Priority	800
Sender	GREENFORM
Sender Priority	800
Dedicated Property Type	---None---

When printing the document change the default TO to see the changes take effect:

The screenshot shows the 'Print a Document for an Item' form with the following fields and values:

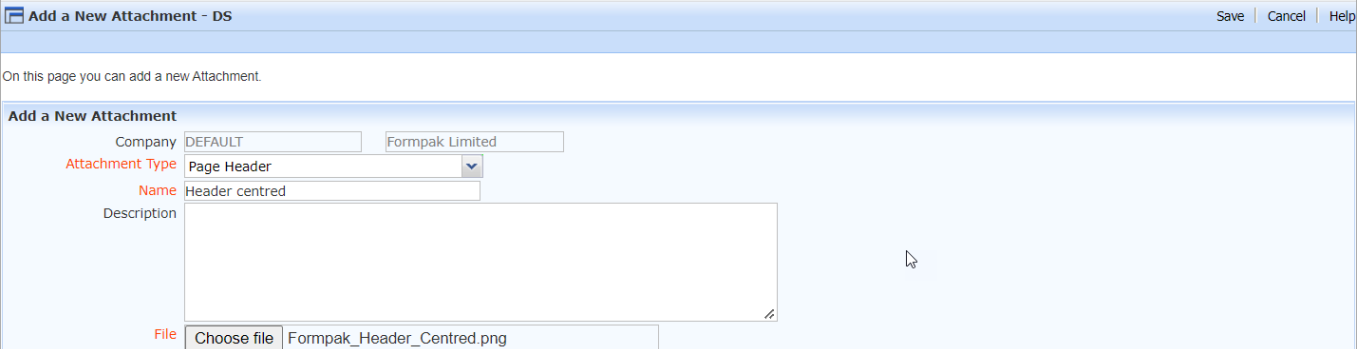
Item	TESTR6	Herb Soup Flavour
Document Type	CLP Safety Data Sheet	
Document Created	<input checked="" type="checkbox"/>	
Document Version	30	
Document Version Date	01/07/2020	E.g. d/m/yyyy
Company		
Application		Dosage %
For Dilution	<input type="checkbox"/>	
Base Item	None	
Cross Reference		
Item Supply Type	<input checked="" type="radio"/> Sale / Normal <input type="radio"/> Sample	
Record Supply	<input type="radio"/> Yes <input checked="" type="radio"/> No	
TO	GREENFORM	
Language	Default	
Copies	1	

Mini Tip

Adding a centralised header to a Safety Data Sheet/document

Did you know you can add a centralised header to your SDS and other documents by following these steps:

1. Go to **Modify a TO**
2. Select **TO** = 'Company name'
3. Select the **Attachments** tab
4. Click **Add Attachment**
5. Select **Attachment Type = Page Header**
6. Enter **Name** = 'Header centred'
7. Click **Browse** and select the Header file (Must be PNG format)
8. Click **Save** to save the Attachment
9. Click **Save** to save the TO



The screenshot shows a software window titled "Add a New Attachment - DS" with a blue header bar containing "Save | Cancel | Help". Below the header, it says "On this page you can add a new Attachment." The main area is titled "Add a New Attachment" and contains the following fields:

- Company:** A dropdown menu with "DEFAULT" selected and "Formpak Limited" visible in a separate box.
- Attachment Type:** A dropdown menu with "Page Header" selected.
- Name:** A text input field containing "Header centred".
- Description:** A large empty text area.
- File:** A field with a "Choose file" button and the text "Formpak_Header_Centred.png".

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>