DELETING A DOCUMENT TYPE
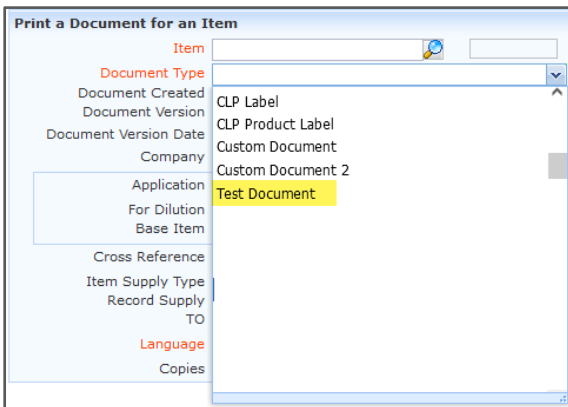
This guide will show you how to delete a document type. You may want to do this if a document type is no longer needed in your system, either due to testing or changes in requirements. Note: when the document type is deleted, you still have access to the history of previous documents printed.

Deleting a Document Type will remove it from the list of documents available to select to print in Print Documents for an Item, Print Documents for a Company and Print Documents and Labels. It will also remove it from the Documents tab for both Raw Materials and Formulations. Below screenshots show examples of the document list before 'Test Document' was deleted.

The history for deleted documents will be retained and can be found through Search for Documents and in View Documents Supplied, the below screenshots were taken before 'Test Document' was deleted and use the Document Type as the search subject.

To delete a document type

Go to Modify a Document Type.

Select the Document Type you wish to delete.

Click on Delete.

In the Pop up box 'Are you sure you want to delete the selected document type?' Click 'Yes'

This has removed the document type 'Test Document' from the list of documents available to select to print and from the Documents tab for both Raw Materials and Formulations, below shows examples of the document lists after 'Test Document' was deleted.

Print a Document for an Item

Item	
Document Type	
Document Created	CLP Label
Document Version	CLP Product Label
Document Version Date	Custom Document
Company	Custom Document 2
Application	
For Dilution	
Base Item	
Cross Reference	
Item Supply Type	
Record Supply	
TO	
Language	
Copies	

View a Formulation - DS   Edit | View Composition | Print Composition

On this page, you can view details of a Formulation.

Formulation

Formulation	TEST12783	Lavender, Cedarwood and Orange Oil

Information

Key Details	Certification	Classification	Composition	Properties	Attachments	Documents

Seq	Document Type	Version
37	CLP Label	3
56	CLP Product Label	1
167	Custom Document	3
168	Custom Document 2	1

The history for deleted document 'Test Document' has been retained and can still be found through Search for Documents and in View Documents Supplied.

As the Document Type has been deleted we can no longer use this as a search field instead we have used the Item Code for Search Documents for an Item and the Company Name for View Documents Supplied, the below screenshots were taken after 'Test Document' was deleted.

Search for Documents

Item	TEST12783 Lavender, Cedarwood and Orange Oil
Document Type	---Any---
Document Design	---Any---
Document Design Version	
Document Version Date	~ E.g. d/m/yyyy
Document Version	☑ Current ☐ Previous

Item	Document Type	Current	Version	version date	Document Design	Document Design Version
TEST12783	Test Document	☑	7	29/12/2021	Test Document	1

View Documents Supplied

Company	DTH-CUST22 Sniffs ☐ Include Belonging Parties
Party Group	
Item	
Code Cross Reference	Name Cross Reference
Application	
Ad Hoc Parameters	
Document Type	---Any--- Document Design ---Any---
Supply Date	~ E.g. d/m/yyyy
Requirement Type	☐ Supply Condition ☐ Manual ☐ Resupply ☐ No Requirement
Required By	
Item Supply Type	☐ Sale / Normal ☐ Sample
Supplied By	

	Company Code	Company Name	Item Code	Item Name	Code XReference	Name XReference	Application	Dosage	Document Type	Supply Date
☐	DTH-CUST22	Sniffs	DTH_MULTIFLOWERS	Multiflowers number 2	DTH_MULTIFLOWERS	Multiflowers number 2			Test Document	23/11/2021

Mini Tip

Some Raw Materials that have Composition (Complex) such as Orange oil are treated like a substance because despite being comprised of multiple chemicals, they are a single entity which is squeezed from orange peel.

The Safety Data Sheet for such Complex Raw Materials rightly shows the Product Identifier as a substance.

Section 1. Identification of the substance or the mixture and of the supplier

1.1 Product Identifier

Product identifier: ORANGE OIL; CAS: 8008-57-9
Other identifiers: None

However, if you purchase an orange fragrance mixture, you would need to add it as a Complex Raw Material (because you don't know the full composition), but it shouldn't be treated as if it is a substance.

By setting 'Treat as Formulation' on the Composition Tab of the Raw Material, the Safety Data Sheet looks more like a Formulation.

Status	Normal
Composition Comment	
Preserve When Exploding	○ Yes ⦿ No
Treat as Formulation	⦿ Yes ○ No

Section 1. Identification of the substance or the mixture and of the supplier

1.1 Product Identifier

Product identifier: ORANGE OIL SWEET ORA0005(Contains:P-MENTHA-1,8-DIENE)
Other identifiers: None

TIP: If you can't see 'Treat as Formulation', make it visible in Manage Application Settings; Category, Composition Development and select Yes for Enable "Treat as Formulation" for Complex Raw Materials.

Manage Application Settings - DS

On this page you can modify the application settings.

Category | Composition Development

Setting	Description	Value
Cost Uplift %		10
Apply Cost Uplift to Formulations		⦿ Yes ○ No
Apply Cost Uplift to Raw Materials		⦿ Yes ○ No
Allow Duplicate Items in Compositions		⦿ Yes ○ No
Prevent Explosion Levels		15
Give Warning Message when Duplicate Items are in Compositions		⦿ Yes ○ No
Enable "Treat as Formulation" for Complex Raw Materials		⦿ Yes ○ No

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.

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