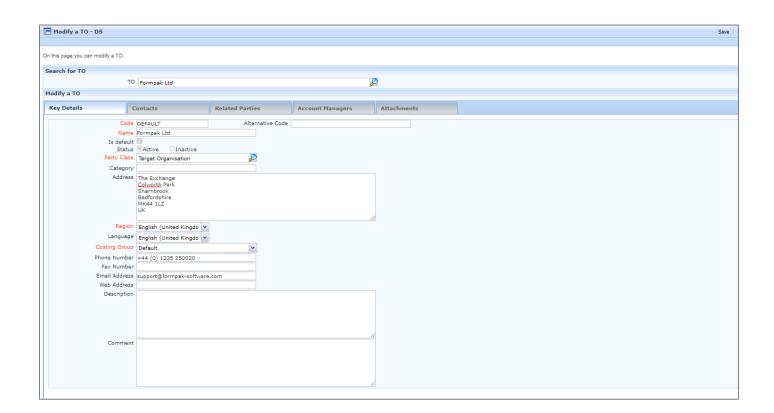


## MODIFYING A DEFAULT TO

## Modify a Default TO

TO stands for Target Organisation and relates to your company. There may be more than one TO, for example different company sites or customers have their own TO. This can be useful if different sites/customers have different requirements, like logos, addresses or even rules. If the company details change, for example a change of address or a change of logo you can Modify the TO to reflect the changes.

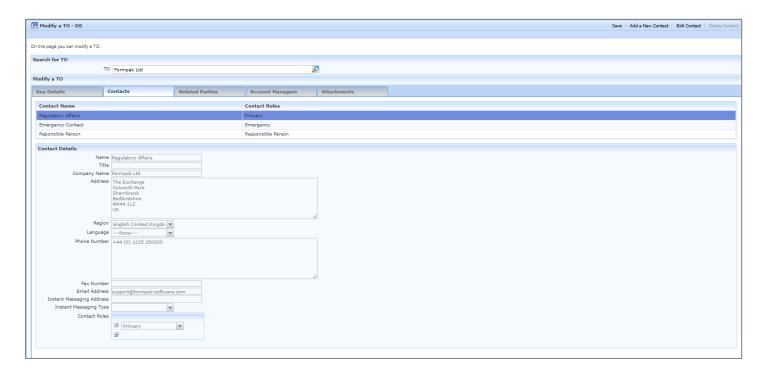
Navigate to 'Modify a TO' and select Default. (Choose the relevant TO code to modify). Change the key details to match the company requirements. Ensure that the address has no commas.



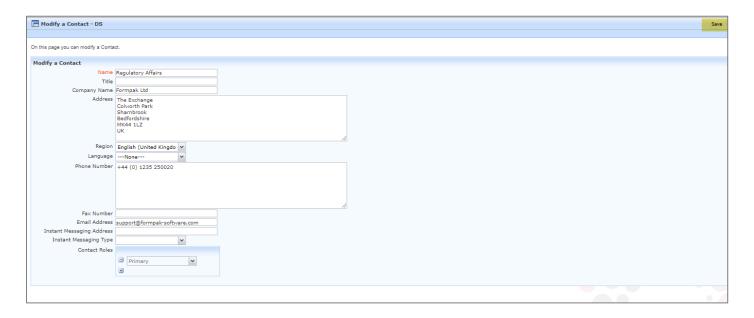
To edit the contact information.

Click the Contacts tab.

Select the Primary Role and click Edit Contact



Modify a Contact box will appear. Amend the details as required. Click Save.



Select the Attachments tab.

To remove an existing logo, select the logo and click Edit and then Delete.



To add a logo click Add Attachment, and a window will appear.

Select Logo not Small Logo from the drop-down menu.

The logo name is usually the name of a company and logo e.g. Formpak Logo.

Choose the file and select the logo (the logo must be in a PNG format, 400-600 x 150-200 pixels). Click save, then save again to save all the TO changes.



Navigate to 'Manage Document Content.'

Enter code. Default, search and select Edit on all the sections to amend the details to match your requirements.

Manage Document Content		
Code	Description	Content
bottomCompany.DEFAULT		Formpak Ltd, The Exchange, Colworth Park, Sharnbrook, Bedfordshire, MK44 1LZ
clp.company.DEFAULT		Formpak Ltd
clp.companyDtl.DEFAULT		The Exchange, Colworth Park, Sharnbrook, Bedfordshire, MK44 1LZ, +44 (0) 1235 250020
companyDetails.DEFAULT		
samsml.company.DEFAULT		
samsml.cpyDtl.DEFAULT		Formpak Ltd, +44 (0) 1235 250020

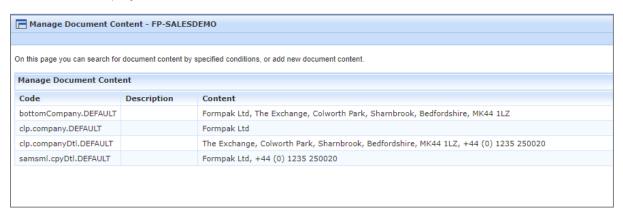
Make sure the data is added to the content field and not the description. Select Yes for Prevent Batch Update (this will prevent the changes being overwritten).



To check it has worked correctly search in Manage Document Content 'Prevent Batch Update' Select Yes. Click Search.



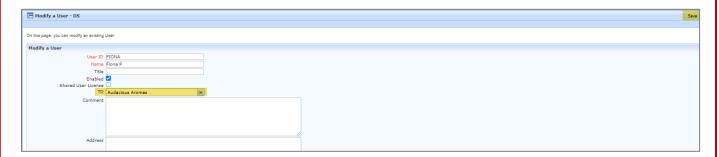
This will then display the content for the document sections.



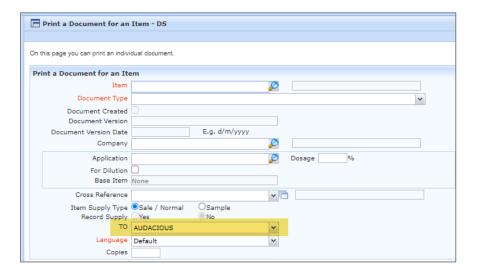
## Mini Tip

You can now add TO (Target Organisation) to a User which is useful if you have a multi-site company with specific Users responsible for different company sites. For example a User may need to generate documents for a specific TO.

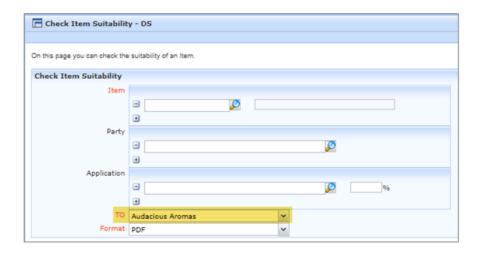
Navigate to 'Modify a User' select the relevant TO from the drop-down menu and click Save.



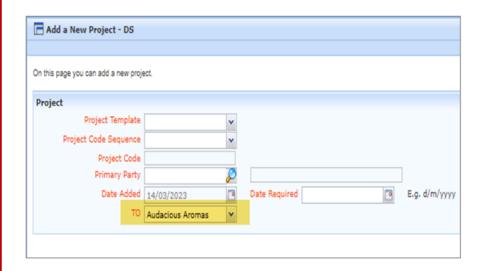
The TO will now become the Users default TO when generating documents.



Checking suitability,



and also adding Projects.



To see previous 'Tip of the Month' articles, please see <a href="here">here</a>.

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 <a href="https://www.youtube.com/user/FormpakSoftware/videos">https://www.youtube.com/user/FormpakSoftware/videos</a>