



TIP OF THE MONTH



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.

Modify a TO - DS Save

On this page you can modify a TO.

Search for TO
TO: Formpak Ltd

Modify a TO

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

Code: DEFAULT Alternative Code: _____

Name: Formpak Ltd

Is default:

Status: Active Inactive

Party Class: Target Organisation

Category: _____

Address: The Exchange
Colworth Park
Sharnbrook
Bedfordshire
MK44 1LZ
UK

Region: English (United Kingdo)

Language: English (United Kingdo)

Costing Group: Default

Phone Number: +44 (0) 1235 250020

Fax Number: _____

Email Address: support@formpak-software.com

Web Address: _____

Description: _____

Comment: _____

To edit the contact information.
 Click the Contacts tab.
 Select the Primary Role and click Edit Contact

On this page you can modify a TO.

Search for TO TO Formpak Ltd

Modify a TO

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

Contact Name	Contact Roles
Regulatory Affairs	Primary
Emergency Contact	Emergency
Responsible Person	Responsible Person

Contact Details

Name Regulatory Affairs
 Title
 Company Name Formpak Ltd
 Address The Exchange
 Colworth Park
 Sharnbrook
 Bedfordshire
 MK44 1LZ
 UK
 Region English (United Kingdo)
 Language ---None---
 Phone Number +44 (0) 1235 250020
 Fax Number
 Email Address support@formpak-software.com
 Instant Messaging Address
 Instant Messaging Type
 Contact Roles Primary

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

On this page you can modify a Contact.

Modify a Contact

Name Regulatory Affairs
 Title
 Company Name Formpak Ltd
 Address The Exchange
 Colworth Park
 Sharnbrook
 Bedfordshire
 MK44 1LZ
 UK
 Region English (United Kingdo)
 Language ---None---
 Phone Number +44 (0) 1235 250020
 Fax Number
 Email Address support@formpak-software.com
 Instant Messaging Address
 Instant Messaging Type
 Contact Roles Primary

Save

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

On this page you can modify a TO.

Search for TO TO Formpak Ltd

Modify a TO

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

Show Current Attachments only

View Details Edit Move To Add Attachment

Seq	Attachment Type	Name	Version	Status	Status Date
1	Logo	Formpak	3	Current	15/11/2022

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.

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.

Manage Document Content - FP-SALESEMO		
On this page you can search for document content by specified conditions, or add new document content.		
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
samsml.cpyDtl.DEFAULT		Formpak Ltd, +44 (0) 1235 250020

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.

Modify a User - DS

On this page, you can modify an existing User.

Modify a User

User ID: FIONA
Name: Fiona P
Title:
Enabled:
Shared User License:
TO: Audacious Aromas
Comment:
Address:

Save

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

Print a Document for an Item - DS

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: AUDACIOUS
Language: Default
Copies:

Checking suitability,

The screenshot shows a web form titled "Check Item Suitability - DS". Below the title is a blue header bar. The main content area has a light blue background and contains the following fields:

- Item:** A text input field with a search icon on the right.
- Party:** A text input field with a search icon on the right.
- Application:** A text input field with a search icon on the right and a percentage sign (%) to its right.
- TO:** A dropdown menu with "Audacious Aromas" selected.
- Format:** A dropdown menu with "PDF" selected.

and also adding Projects.

The screenshot shows a web form titled "Add a New Project - DS". Below the title is a blue header bar. The main content area has a light blue background and contains the following fields:

- Project Template:** A dropdown menu.
- Project Code Sequence:** A dropdown menu.
- Project Code:** A text input field.
- Primary Party:** A text input field with a search icon on the right.
- Date Added:** A date input field with the value "14/03/2023" and a calendar icon on the right.
- Date Required:** A date input field with a calendar icon on the right and the text "E.g. d/m/yyyy" to its right.
- TO:** A dropdown menu with "Audacious Aromas" selected.

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>