formpak | TIP OF THE MONTH

ADDING PRICING AND OTHER INFORMATION TO THE SAMPLE DELIVERY NOTE

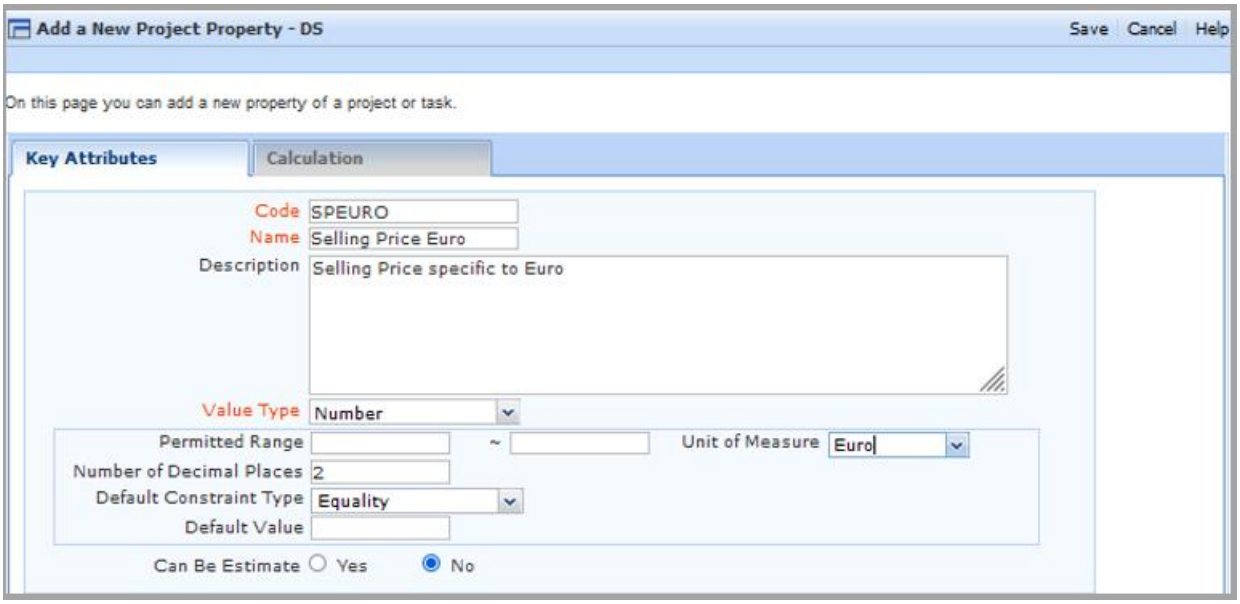
When you answer Projects and send samples, you may include a sample delivery note for your customer.

It is possible to display additional information on your Sample Delivery note, this can be done by adding Project Properties.

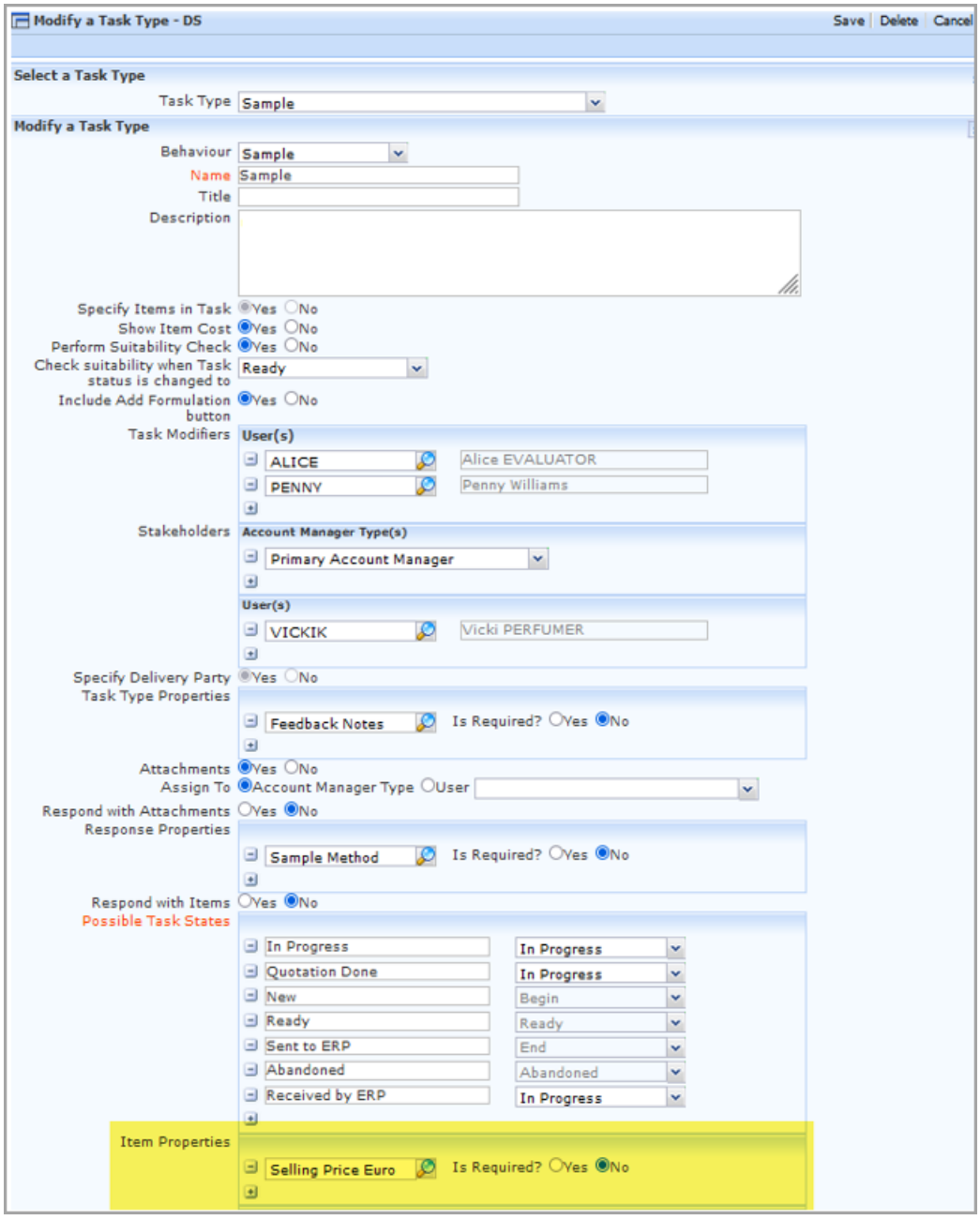
Pricing is often included in the Sample Delivery note. This area is very flexible to enable you to add additional properties. You can add a 'project property' to represent selling price and then you can add this project property to the sample task. In the standard sample delivery note, this will simply appear. You can do similar with other information. For example, you could add an odour or taste description for each of the products sampled.

The example below shows how to add a new Selling Price property to a Sample Task Type (steps 1 and 2), then add a Selling Price to an item in a Task (step 3), finally showing how selling price appears on the Sample Delivery Note (step 4).

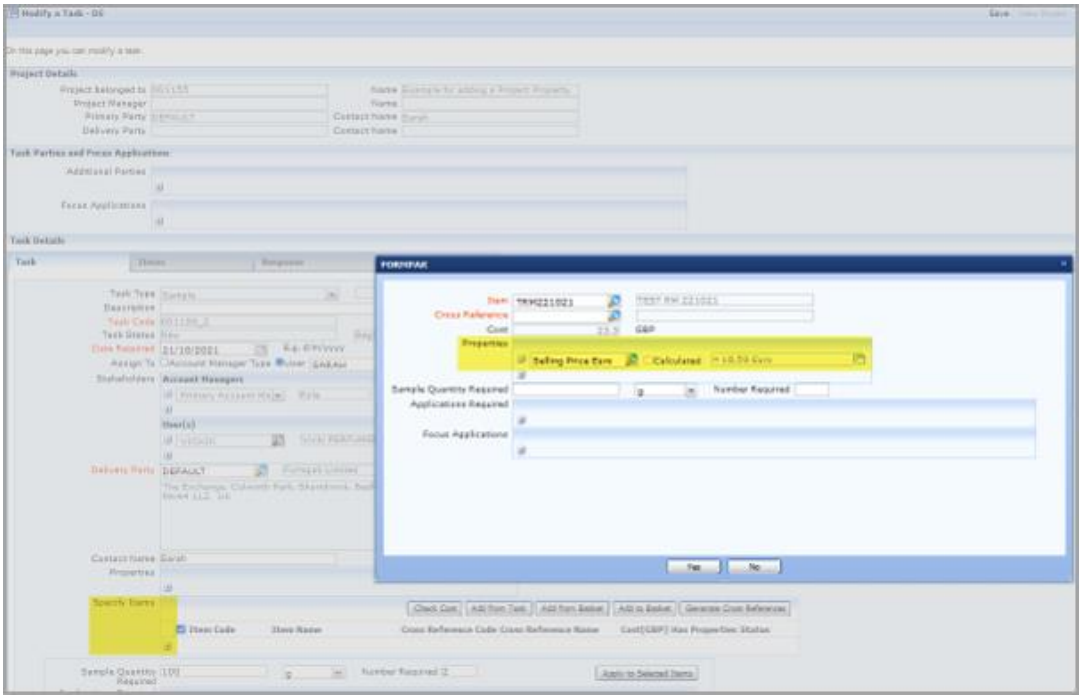
1. Add the required Selling Price property via Add a New Project Property, for example:



2. Add the new property to the relevant Sample Task Type, so it always appears as a suggestion
    a. Modify a Task Type
    b. Select the '+' in Item Properties and select the Property
        - Next to the Item Property you are offered the choice 'Is Required? Yes or No'
            - If option 'Yes' is selected a value must be entered for this Project Property to be able to complete the Sample task.
            - If option 'No' is selected a value may be entered but is not required to complete the Sample task.



3. Add a Selling Price to items in a Sample task
    a. When you specify an item you will be able to enter a value for ‘Selling Price Euro’ Project Property



4. Print a Sample Delivery Note from the Sample task
    a. This will contain the usual information, plus the property name and value, as shown below

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Sample Delivery Note

Sample Task: 001155_2

Send To:
Formpak Limited
The Exchange, Colworth Park, Sharnbrook, Bedfordshire,
MK44 1LZ, UK

Contact: Sarah

We have pleasure in enclosing the following samples:

Code	Name	Samples	Properties
TRM221021	TEST RM 221021	2 x 100g Sample	Selling Price Euro: 18.59 Euro

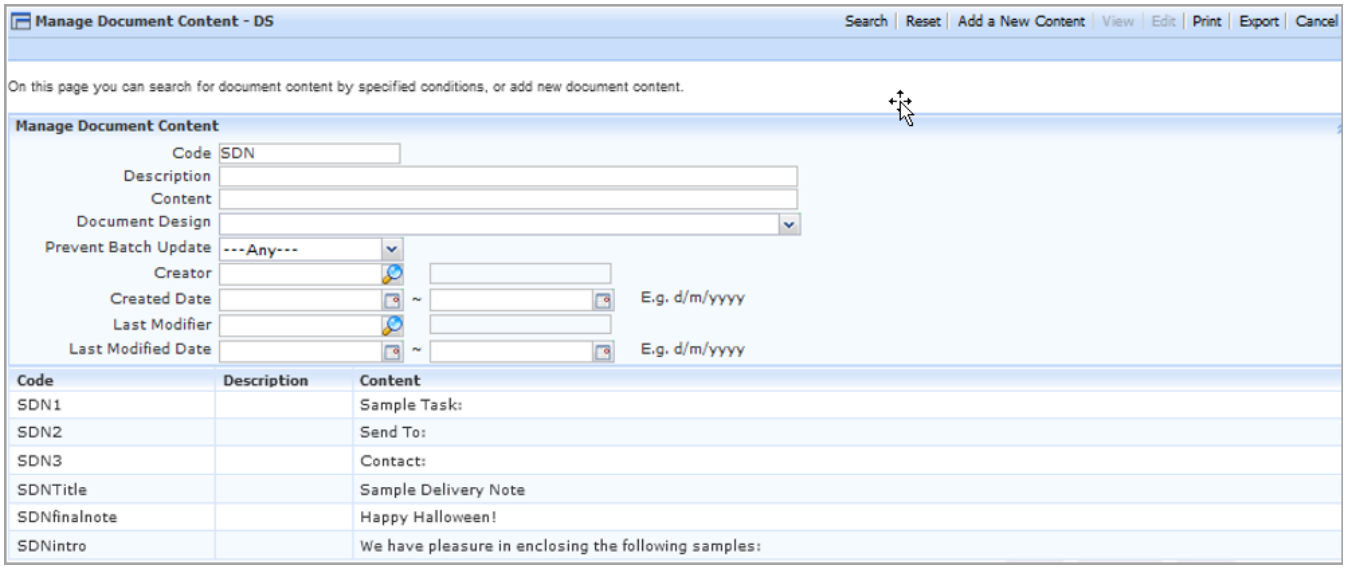
Thank you for your request

Mini Tip

Did you know you can change the document content on a Sample Delivery Note?

This can be done via Manage Document Content

- Search for code SDN
- Select the required Document Content
- Click on Edit
- Edit the content value as required
- Save



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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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