



## 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:

The screenshot shows a software window titled "Add a New Project Property - DS". The window contains a form with two tabs: "Key Attributes" and "Calculation". The "Key Attributes" tab is selected. The form fields are as follows:

- Code: SPEURO
- Name: Selling Price Euro
- Description: Selling Price specific to Euro
- Value Type: Number
- Permitted Range: [ ] ~ [ ]
- Unit of Measure: Euro
- Number of Decimal Places: 2
- Default Constraint Type: Equality
- Default Value: [ ]
- Can Be Estimate:  Yes  No

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.

**Modify a Task Type - DS** Save | Delete | Cancel

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**Select a Task Type**  
 Task Type:

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**Modify a Task Type**

Behaviour:

Name:

Title:

Description:

Specify Items in Task:  Yes  No

Show Item Cost:  Yes  No

Perform Suitability Check:  Yes  No

Check suitability when Task status is changed to:

Include Add Formulation button:  Yes  No

**Task Modifiers**

User(s)

<input type="text" value="ALICE"/>	<input type="text" value="Alice EVALUATOR"/>
<input type="text" value="PENNY"/>	<input type="text" value="Penny Williams"/>

**Stakeholders**

Account Manager Type(s)

User(s)

<input type="text" value="VICKIK"/>	<input type="text" value="Vicki PERFUMER"/>
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Specify Delivery Party:  Yes  No

**Task Type Properties**

Is Required?  Yes  No

**Attachments**  Yes  No

Assign To:  Account Manager Type  User

Respond with Attachments:  Yes  No

**Response Properties**

Is Required?  Yes  No

Respond with Items:  Yes  No

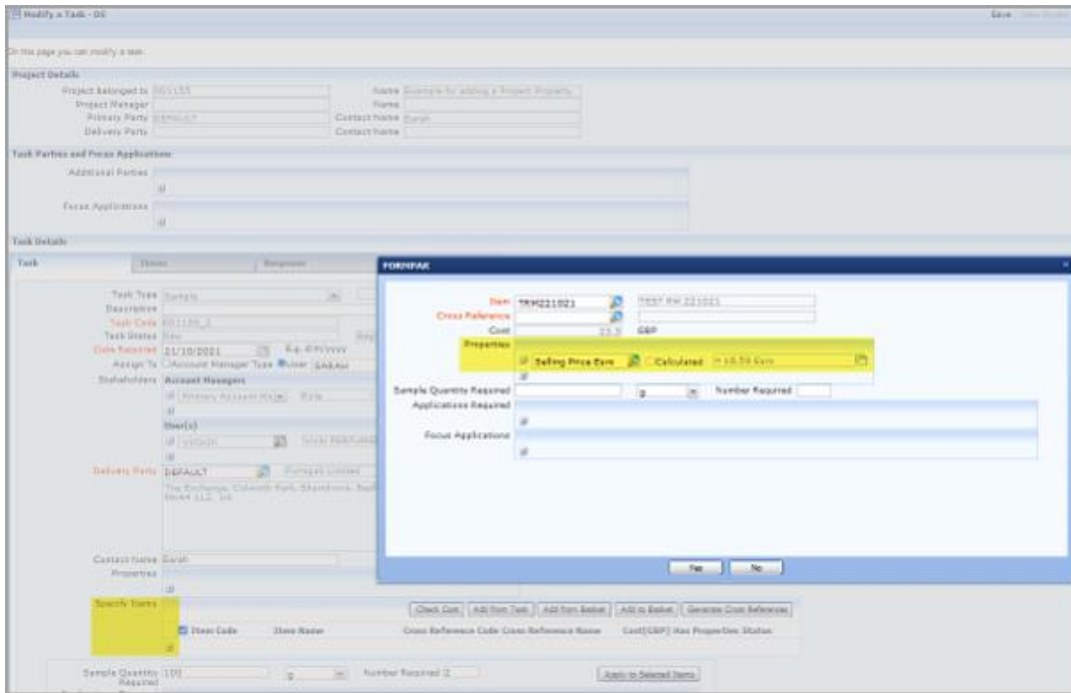
**Possible Task States**

<input type="text" value="In Progress"/>	<input type="text" value="In Progress"/>
<input type="text" value="Quotation Done"/>	<input type="text" value="In Progress"/>
<input type="text" value="New"/>	<input type="text" value="Begin"/>
<input type="text" value="Ready"/>	<input type="text" value="Ready"/>
<input type="text" value="Sent to ERP"/>	<input type="text" value="End"/>
<input type="text" value="Abandoned"/>	<input type="text" value="Abandoned"/>
<input type="text" value="Received by ERP"/>	<input type="text" value="In Progress"/>


**Item Properties**

Is Required?  Yes  No


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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Date : 26/10/2021



### 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

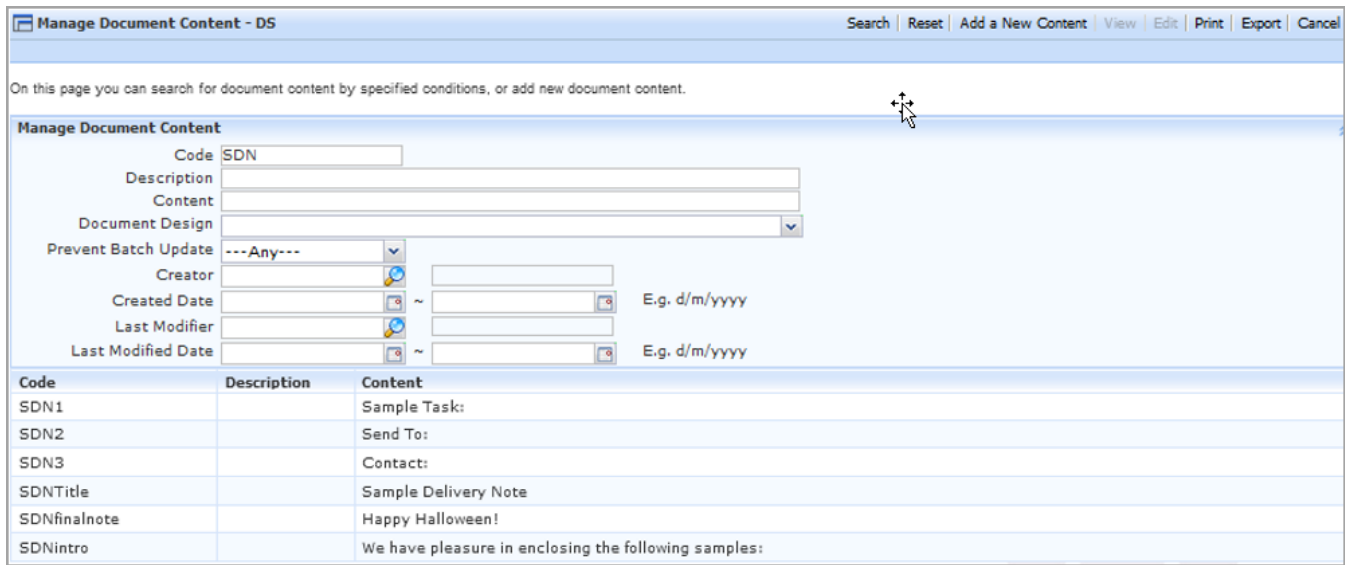
Thank you for your request

## 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



Manage Document Content - DS

Search | Reset | Add a New Content | View | Edit | Print | Export | Cancel

On this page you can search for document content by specified conditions, or add new document content.

**Manage Document Content**

Code: SDN

Description: [Text Field]

Content: [Text Field]

Document Design: [Dropdown]

Prevent Batch Update: ---Any---

Creator: [Text Field]

Created Date: [Date Picker] ~ [Date Picker] E.g. d/m/yyyy

Last Modifier: [Text Field]

Last Modified Date: [Date Picker] ~ [Date Picker] E.g. d/m/yyyy

Code	Description	Content
SDN1		Sample Task:
SDN2		Send To:
SDN3		Contact:
SDNTitle		Sample Delivery Note
SDNfinalnote		Happy Halloween!
SDNintro		We have pleasure in enclosing the following samples:

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](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](mailto: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>