



TIP OF
THE
MONTH



Custom Document

The Custom Document is a customisable document which you can use for your business requirements. Many companies set the Custom Document up to be used as a Product Specification, but it can be used for other purposes such as Declarations or Reports.

Import

To import the Custom Document File, download the file from this link [Custom Document](#)

Please do not unzip the file.

Select Batch Import Document Types.

Browse and select downloaded zip file.

Add New Document Types select Yes.

Modify Existing Document Types select No.

Select Import.

Leave 'Save as a New Version' blank if testing the document.

Modifying the Document Content

Now the Custom Document has been successfully imported the content can be edited.

CUSTOM DOCUMENT	
Top Note	
PRODUCT:	Herb Soup Flavour
PRODUCT CODE:	TESTR6
Flash Point (Celsius):	41 °C
Appearance:	A colourless to pale green liquid that has the characteristic aroma and flavour of basil.
Odour:	Pack 1: Predominantly nutmeg Pack 2: Leek
Refractive Index @ 20C:	10.0000 - 12.0000
Specific Gravity @ 20C:	1.2000 - 1.2600
Shelf Life (months):	12
End Note	
Disclaimer	

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To modify this content:
 Navigate to Manage Document Content.
 Select the document design i.e. Custom Document.
 Select Search.

Manage Document Content

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

Manage Document Content

Code:

Description:

Content:

Document Design: Custom Document

Prevent Batch Update: ---Any---

Creator:

Created Date: ~ E.g. d/m/yyyy

Last Modifier:

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

Code Description Content

This will display all the document content within the document.

Manage Document Content

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

Manage Document Content

Code	Description	Content
bottomCompany.		
bottomCompany.DEFAULT		Formpak Limited, The Exchange, Colworth Park, Sharnbrook, Bedfordshire MK44 1LZ
cd.Disclaim		
cd.NoteEnd1		Note End1
cd.NoteTop1		
cd.product		PRODUCT:
cd.productCode		PRODUCT CODE:
cd.title		CUSTOM DOCUMENT
issueDate_cdn		Issue date:
page		Page
preview		Preview
version:		Version:

Click on the content to be edited and select on Edit.

Make the required changes in the Content field and select Save.

Manage Document Content

On this page you can modify or delete existing document content.

Modify Document Content

Code: cd.product

Description:

Content: PRODUCT:

Prevent Batch Update: No Yes

If you would like a document content field to not show on the Custom Document edit the field and remove the content from the Content box. Select Save. This will now show no content for that field on the document.

Adding Properties to a Property Group

The Custom Document displays all properties within the Property Group 'Custom Document Properties',
 Navigate to Modify a Property Group.

Select Property Group 'Custom Document Properties'.

Select the plus sign.

Modify a Property Group - TEST (DB2 V10.5)

On this page you can modify a Property Group.

Select a Property Group
Property Group: Custom Document Properties

Modify a Property Group

Key Details

Sequence: 199
Name: Custom Document Properties
Description: Custom Document Properties

Is Visible:
Can edit:

Properties

Seq	Property Code	Abbreviation

Input each Property you want to appear on the Custom Document.

Modify a Property Group - TEST (DB2 V10.5)

On this page you can modify a Property Group.

Select a Property Group
Property Group: Custom Document Properties

Modify a Property Group

Key Details

Sequence: 199
Name: Custom Document Properties
Description: Custom Document Properties

Is Visible:
Can edit:

Properties

Seq	Property Code	Abbreviation	Name
1	FP		Flash Point (Celsius)
2	APPEARANCE		Appearance
3	ODOUR		Odour
4	RI		Refractive Index @ 20C
5	SG		Specific Gravity @ 20C
6	SHELF LIFE		Shelf Life (months)

Select Save.

Modify a Raw Material or a Formulation and add the Property Values to the relevant Properties.


Navigate to Print a Document for an Item.

Input your Item Code.

Select Custom Document from the Document Type drop down menu.

Select the Customer.

Select Print to PDF and the Custom Document is generated.


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Version: 1 (24/10/2024)

CUSTOM DOCUMENT

PRODUCT: Sweet Orange Oil

PRODUCT CODE: 1236584

Point éclair: 55 °C

Odour: Conforms

Refractive Index @ 20C: 1.4700 - 1.4750

Specific Gravity @ 20C: 0.842 - 0.846

Shelf Life (months): 12

For further information on setting up the Custom Document click [here](#) to view the Custom Document Training Session Recording.

Mini Tip

Using the 'Custom Document' to help manage change

You can also use the Custom Document to monitor changes for your products. For example, you may want to report transport classification, and GHS labelling in a single document. Add the required Properties to the Custom Document Properties Property Group. Each time there is a change to the Property Value the Document is automatically revised based on certain conditions, including the versioning properties, which can be set individually for each document type. This means there is a simple way to track changes.

To set this up navigate to Modify a Document Type.

Select Custom Document from the Document Type drop down menu.

Add the versioning properties.

Select Save.

Now set up a Document Supply Condition to update the version based on changes in properties.

An example set up to achieve this is:

Navigate to Modify a Document Supply Condition.

Select Custom Document from the drop-down menu.

Input the details as required.

Select Save.

Click [here](#) for further information on setting up Document Supply Conditions.

Modify a Document Supply Condition - TEST (DB2 V10.5)

On this page you can modify or delete Document Supply Condition.

Select a Document Supply Condition
Document Supply Condition: Custom Document

Modify a Document Supply Condition

Name: Custom Document

Description:

Automated Supply for Sales: First Supply and Resupply

Automated Supply for Samples: None

Supplying Item Period: 24 month(s)

Unsupplied Document Revision Period: 24 month(s)

Unrevised Document Resupply Period: 24 month(s)

Item Validity Property:

Document Requires Suitability Check: Yes No

Rule Script:

The Custom Document will now create a new version every time there is a change to the versioning Properties. When printing 'record supply' to Customers / your company. Please click [here](#) to view the related article on Manage Documents Required.