



Quick
Start
Guide



Adding Attachments



Adding Attachments

Modify a Raw Material

Save | View Composition | Print Composition | View Sample Details | Cancel | Help

On this page, you can modify attributes and properties of a Raw Material.

Raw Material: DEMORM | Demo Raw Material

Information

Key Details | Identification | Certification | Classification | Composition | Properties | **Attachments** | Documents | Purchasing | Sales

Show Current Attachments only

View Details | Edit | Move To | **Add Attachment**

Seq	Attachment Type	Name	Version	Status	Status Date
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Attachments are documents or files, produced outside of Formpak, which can be uploaded to Formpak. *Please note you must have at least one attachment type available.*

To add an attachment, open the Raw Material or Formulation in 'Modify a Raw Material' or 'Modify a Formulation'

Select the 'Attachments' tab

Click the 'Add Attachment' button

Add a New Attachment

Save | Cancel | Help

On this page you can add a new Attachment.

Add a New Attachment

Item: DEMORM | Demo Raw Material

Attachment Type: [Dropdown]

Name: [Text Box]

Description: [Text Area]

File: **Browse...** No file selected.

Select the Attachment Type from the drop down box

Enter your chosen name for the uploaded file

Click the 'Browse' button, locate the file to attach and click 'Open'

Click the 'Save' button to save the attachment

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Information

Key Details | Identification | Certification | Classification | Composition | Properties | **Attachments** | Documents | Purchasing | Sales

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Seq	Attachment Type	Name	Version	Status	Status Date
1	SDS	CLP Annex I SDS	1	Current	01/13/2015

The attachment will now appear in the 'Attachment' tab

Click the 'Save' button to save the changes to the raw material or formulation

To open an attachment click on the name of the file.



formpak



Adding Attachments

Frequently Asked Questions

What can I add attachments to?

Attached to the following:

- Companies (Customer, Supplier, TO)
- Items (Raw Material Formulations)
- Projects
- Tasks
- Jobs

Can attachments be updated or deleted?

To update an attachment select the attachment, click the 'Edit' button then click 'Browse' and upload the new attachment. To delete the attachment, click the 'Edit' button then click 'Delete'

How do I attach a company logo so it appears on a document?

Company logos can be added to a TO.

These articles on our Support Centre will help with the process:

[Adding a Company Logo to a TO](#)

[Adding TO details to a Document](#)

Tips



- Formpak has a built in Help Centre. Click the 'Help' button to access.
- You can add new attachment types using 'Add a New Attachment Type'
- To edit existing attachment types use 'Modify an Attachment Type'
- Attachments are organised using 'Attachment Type'
- When adding an attachment, you can include a description to provide more details about the attachment
- The 'View Details' button allows you to view the details of an attachment such as the user who attached it and the date it was added.
- When attaching a logo to a TO the file needs to be a PNG format and no bigger than 600 px (w) x 200 px (h).

Further training on this topic is available on our [Support Centre](#).

