

Changing the Name and File Name of a Document

Within Formpak you can change the name of a Document and the File Name when saving.

For this example, a CLP Safety Data Sheet is being saved for Item FL-004.

In View a Document Type, we can see that the Name of the Document is 'CLP Safety Data Sheet.' The File Name

Template field is blank, so the default file name will be the Document Type (Name) and the suffix Code.

🐞 Enter name of file to save	to				×
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File name: CIP Sa	faty Data Sheet - EL-004				
Save as type: Dortabl	le Document Format				· .
Hide Folders View a Document Type - F On this page you can view details of a	P-SALESDEMO a Document Type.			Save	Cancel
Select a Document Type					
Document Type	CLP Safety Data Sheet			~	
Key Details	Permissions	Notes			
Name Description	CLP Safety Data Sheet				
File Name Template				i.	
Contact Role	Primary 🗸				

To change the name of the Document:

- 1. Navigate to Modify a Document Type
- 2. Select the Document Type you would like to change the name of from the drop-down list.
- 3. Change the document name, in this example the name has been changed to CLP SDS.

Note: this will also change the Document Name in the drop-down list in Print Document for an Item.

4. Select Save.

Hodify a Document Type		
This page allows you to modify a doo	ument type.	
Select a Document Type		
Document Type	LP Safety Data Sheet	*
Modify a Document Type		
Key Details	Permissions	
Name Description	CLP SDS	
File Name Template		<u>н</u>
Contact Role	Primary 👻	

When generating the Document in Print Document for an Item and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the updated name and Code.

🐞 Enter name of file	to save to		×
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File name:	CLP SDS - FL-004		~
Save as type:	Portable Document Format		~
∧ Hide Folders		Sav	e Cancel

The Document is also renamed in the list for Print Document for an Item.

Print a Document for an	Item	Print Select P	rinter Email PD	F Print to PDF	Preview	Print Later	New Cros
On this page you can print an indi	vidual document.						
Print a Document for an Ite	em						
Item	FL-004		Þ	Lemon & Lime	e formulatio	n	
Document Type							~
Document Created	CLP Product Label					^	
Document Version	CLP SDS						
Company	CLP Safety Data She	et (Banded)				~	h i
Application			٢	Dosage	%		

To add suffixes to the File name:

- 1. Navigate to Modify a Document Type.
- 2. Select the Document Type you would like to change the name of from the drop-down list.

3. Enter the chosen fields in the File Name Template field – In this example the Document Type, Code and Date are required.

Modify a Document Type		
This page allows you to modify a doo	ument type.	
Select a Document Type		
Document Type	LP Safety Data Sheet	~
Modify a Document Type		
Key Details	Permissions	
Name	CLP Safety Data Sheet	
Description		
File Name Template		
rile Name Template	<pre><bodde> - <bodde> - <bodde> - </bodde></bodde></bodde></pre>	
Contact Role	Primary V	

4. Click Save

When creating the Document in Print Document for an Item and selecting either 'Preview' or 'Print to PDF' the download 'Save As' file name now contains the required suffixes.

じ Enter name of file to sav	ve to		×
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Organise - New fold	er) •
This PC 3D Objects Desktop Documents Downloads	Name	Date modified	Type Siz
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File name: CLP	Safety Data Sheet - FL-004 - 28072020		~
Save as type: Porta	ble Document Format		~
∧ Hide Folders		Save	Cancel

Below are the different suffixes which can be added to the File Name Template:

- <DocumentType> Name of Document type
- <Code> Code of Item / Cross Reference
- <Name> Name of Item / Cross Reference
- <Version> Document version
- <VersionDate:> Version date, you can specify date format after ':',
- e.g <VersionDate:MMdd> or <VersionDate:ddMMYYYY>
- <Date:> Document created date, you can specify date format
- <ApplicationName> Name of Application
- <Dosage> Dosage(s) of Application
- <RegionCode> Code of Region
- <LanguageCode> Code of Language.

Mini Tip

Using Capitals to Search

Search with Capital Letters

Using the first capitalised letter for each word for the area you want to navigate to. For example, FMI takes you to 'Find Matching Items.'

Home Projects & Tasks • Jobs • Items • Class	sification • Properties • Suitability • Certifications • Documents & Reports • Parties • A
T FMI	Find Matching Items
Find Matching Items	
	On this page you can search for Items by specified conditions.
	Find Matching Items
	Code
	Name OR 🗸

Or AANF will take you to 'Add a New Formulation'

AANF	Add a New Formulation					
Add a New Formulation						
	On this page, you can add a new	Formulation				
	on and page, yes can also a new					
	Formulation	Development Job	Attachments			
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