

Background Forms

The IBCOS GOLD Document Forms Module stores background forms for use when printing or emailing invoices and other documents. The background form is usually a PDF file of the exact layout of company stationery including any logos and other information normally contained on printed stationery.

With these forms set the entire document can be printed exactly as it would be when using pre-printed stationery, normally reducing the cost of each print.

Each individual type of document produced by Gold can have a separate form to specify the background.

Document Management/Email

Document Forms can also link to the Document Management System so that documents sent can be stored within the document store, for example, against the customer invoice in the Sales Ledger. These stored documents can then be recalled and reprinted or re-sent exactly as the original if required.

This also means that documents may be faxed or emailed to customers or suppliers in the same format as the company stationery. Refer to factsheet FS08 for further information.

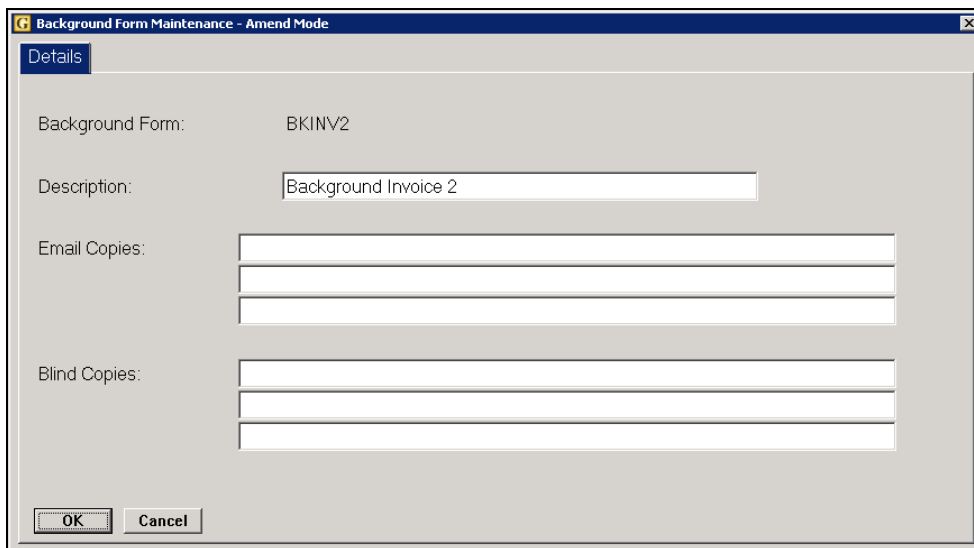
Gold Set Up

Background Forms

(System Management/Housekeeping, Text Images / Printers)

Used to specify the background image for the document. Images should be a PDF file for A4 size paper, for example the company standard headed paper. The company logos required should be contained within the PDF file.

The **“Import”** button is used to import PDF files.



The screenshot shows a window titled "Background Form Maintenance - Amend Mode". Inside the window, there is a "Details" tab. The form contains the following fields:

- Background Form: BKINV2
- Description: Background Invoice 2
- Email Copies: Three empty text input boxes stacked vertically.
- Blind Copies: Three empty text input boxes stacked vertically.

At the bottom left of the window, there are "OK" and "Cancel" buttons.

Addresses for Email copies may be entered to email a copy of the document to the chosen recipient.

Company Control File

(System Management, Company Control File)

To specify the standard body email text a file can be created and added to the company control file.

The screenshot shows a 'Company Control File Maintenance' dialog box with the following fields and values:

- Company Name:
- Company Address:
- Doc. Store:
- Email Body File:
- Statement Start:

Buttons:

This file needs to have been imported via the process above.

Document Forms

(System Management/Housekeeping, Text Images / Printers)

Document forms can be set up for each type of document, advice notes, delivery notes, invoices, picking lists etc.

Different forms may also be set up for each depot so that they can carry different address details.

It is also possible to set up forms for different types of invoice to produce different invoices for point of sale than for workshop jobs etc.

Identity	Depot	Option	Description
AV			Advice Notes
CF			Custom Forms
CS			Cost Sheet
DF			Draft Print
DN			Delivery Note
ID			Internal Documents
IN			Invoices
INPOS			Invoices
JC			Workshop Job Cards
MS			CRM Mailshots
PF			Pro-forma Invoices
PL			Picking Lists
PO			Purchase Orders

Using the **"Default"** button it is possible to select one default background form for all document types.

New records cannot be created, however the “**Copy**” option can be used to copy an existing document type to a new type. Individual document types can then be amended to change or add background forms.

Key Entry Fields (# indicates default setting)

Identity		Document Identity Code: For example:
	AV	Advice Notes
	DF	Draft Invoices
	DN	Delivery Notes
	IN	Invoices
	JC	Job Cards
	MS	CRM Mailshots
	PF	Proforma Invoice
	PL	Picking List
	PO	Purchase Orders
	PR	Purchase Remittance Advices
	QU	Sales Quotes
	ST	Customer Statements/Debt Letters
	WA	Supplier Warranty Claims

Option	<p>POS</p> <p>PLM</p> <p>PLT</p> <p>WSJ</p> <p>WGD</p> <p>DBT</p>	<p>Leave blank to cover all areas or select Point of Sale, Planned Maintenance, Plant Hire, Workshop or Wholegoods.</p> <p>(This option is seen only when copying a document type)</p> <p>Use DBT when copying from ST for statements to create a different background for Debt Letters</p>
Depot Code		Enter a specific Depot code if required.
Invoice Type		Enter a specific Invoice Type for the design, if required.
Description		Enter a description for the form.
Document Type	Hyperlink Available	Select an appropriate Document Type to link to the document store if in use.
Background Form	Hyperlink Available	Select the required background form for the document.
Copies		Enter the default number of copies to produce.
Contact Code	Hyperlink Available	<p>If desired, enter a Contact Type Code to be used when sending documents. For example, add contact type AC for Accounts Contact.</p> <p>The documents will be emailed to the accounts contact at the company if this is set on the customer account.</p>
Attach File		Enter a filename to be automatically attached to emails of this type (file must exist in the \$FRM directory)