

# DocStore Maintenance Guide

## How to configure and maintain document settings

This guide is intended for system administrators and provides instructions for configuring and maintaining document settings in DocStore. It covers tasks such as setting up storage locations, configuring email addresses, managing document forms and performing bulk document maintenance. It should only be used by those responsible for administering DocStore or performing maintenance to ensure documents are processed and stored correctly.

### 1. CONFIGURING DOCUMENT SETTINGS

Several system settings must be configured to enable outgoing documents to be stored in DocStore.

#### Configuring the Default Document Storage Location

The Default Windows Share defines where Gold generates and stores outgoing documents before they are emailed, faxed or filed in DocStore. This must be set so that outgoing documents can be created and processed correctly.

In Gold, navigate to  
**System Management > Security > Terminal Identity Maintenance**

#### Setting the Sender Email Address

The user's email address is used as the sender address when outgoing documents are emailed to customers, suppliers or sent to the Document Store. This must be configured for all existing users and any new users created.

In Gold, navigate to  
**System Management > Security > Personnel Security File**

1. Open the user record.
2. Select the **Details** tab and enter the user's **Email Address**.

Function Key	Description	Menu Selection
F2	Prt Enq	M2.1
F3	WMS Enq	M1.1
F4	CUS Enq	M4.1
F5	SUP Enq	M5.1
F6	Nom Enq	M6.1

## Setting the DocStore Email Address

The Company Control File holds company level settings used across Gold. Gold uses the DocStore email address to automatically send outgoing documents into DocStore for filing.

In Gold, navigate to  
**System Management > Security > Company Control File**

1. Enter or confirm the DocStore **Email Address**.

The screenshot shows a window titled 'Company Control File Maintenance'. It has a menu bar with 'Company', 'General', 'Parts', 'Workshop', '(WHOLEGD)', 'Plant Hire', 'Accounts', and 'CRM'. The 'Company' menu is open. Below the menu, there are several input fields: 'Company Name' with the value 'Ibcos Demonstration', 'Company Address' with the value 'Ibcos Computers Ltd', 'Poole Tel' with '01202 714200', 'Coventry Tel' with '01203 717179', and 'Doc. Store' with 'docs@ibcos.co.uk'.

## Configuring Outgoing Document Forms

Document Forms control the layout and content of outgoing documents produced by Gold. Forms can be configured by depot to include different address details and different forms can be used for specific invoice types, such as point of sale invoices or workshop job invoices.

In Gold, navigate to  
**System Management > Document Store/Forms/Rules > Document Forms**

1. Use the table below to fill in the key details and select **OK** to save changes.

Field	Options	Entry
Identity	Examples: AV – Advice Notes IN – Invoices JC – Job Cards MS – CRM Mailshots PO – Purchase Orders PR – Purchase Remittance Advices QU – Sales Quotes ST – Customer Statements WA – Supplier Warranty Claims	Enter an identity code of up to 6 characters to identify the document form.
Description		Enter a description for the document form.

Field	Options	Entry
Document Type	Examples: CUSI – Customer Invoices CUST – Customer Documents PAPO – Purchase Orders SUPP – Purchase Remittance Advices CUSTQU – Customer Quotes WSJ – Workshop Job Cards	Select the appropriate Document Type for the form.
Background Form	Hyperlink Available	See below.
Contact Code	Hyperlink Available	If required, enter a contact type code to use when sending documents (for example, <b>AC</b> for Accounts). If set, documents are emailed to the contact of this type on the customer account.
Update Text Copy	Yes No	Select <b>Yes</b> only if DocStore is not in use and documents are stored as text copies only. Select <b>No</b> when using DocStore.
Override Settings	Yes No	Set to <b>Yes</b> to override any settings held on the customer account, such as the contact type used when sending documents. Select <b>No</b> to use the customer account settings.
Copy to Document Store	Yes No	Select <b>Yes</b> to automatically store the document in DocStore.

## Configuring Document Headers and Footers

Background Forms define the headers and footers applied to outgoing documents. These are used to ensure documents match company headed paper and include company branding. Background images must be provided as PDF files sized for A4 paper and should include the required logos.

In Gold, navigate to  
System Management > Text Images/Printers > Background Forms Maintenance

1. Enter or confirm the DocStore **Email Address**.

The screenshot shows a 'Background Form Maintenance - Amend Mode' dialog box. It has a 'Details' tab. The 'Background Form' field is set to 'BKINV2'. The 'Description' field contains 'Background Invoice 2'. There are two 'Email Copies' fields, both empty. There are two 'Blind Copies' fields, both empty. At the bottom, there are 'OK' and 'Cancel' buttons.



### Did you know?

Additional email addresses can be entered so a copy of the document is emailed as well as sent to the primary recipient.

## Configuring Document Headers and Footers

Email and fax services are required to distribute outgoing documents directly from Gold. Emails must be configured to allow documents to be sent to customers, suppliers and DocStore. Faxing requires a licensed fax solution, such as Hylafax. Ibcos can arrange and configure email and fax services if required.

## 2. BULK DOCUMENT DELETION

The Mass Document Delete function allows authorised users to delete multiple documents from DocStore using defined selection criteria. Documents selected for deletion are initially marked as Deleted and remain visible until the Sales Ledger Month End is run. During month end processing, documents marked as deleted are permanently purged from DocStore.

In Gold, navigate to

**System Management > Text Images/Printers > Mass Document Delete**

1. Use the table below to identify the documents to be deleted. A # indicates the default option.

2. Select **OK** when complete.

Field	Options	Entry
Document Types		Select a specific document type or leave blank to include ALL document types.
Include Status	On Hold# Stored Deleted All	Select the document status to include.
Email From		Enter the sender's email address.
Sent Date	From/To	Enter a date range to filter by the email sent date.
Rec Date	From/To	Enter a date range to filter by the email received date.

Field	Options	Entry
Containing		Enter text to search for in the email subject line. The search is not case sensitive. Use <b>AND / OR</b> to add additional text criteria.
Excluding		Enter text that the subject line must not contain. <b>AND / OR</b> options are also available for additional criteria.
2nd Ref Type	Customer Supplier Part Wholegood Equipment Order WS Job No	Select the reference type expected for the document, based on the document rules, then enter the relevant key value(s) for that reference.

### 3. USEFUL INFORMATION



**Support Number:**  
+44 (0) 1202 714200  
Press Option 1



**Support Email:**  
support@ibcos.co.uk



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