Form File Names

Forms you create for invoices, statements, and all other customer and supplier documents use pre-defined form names. You need to know these names if you wish to customise invoices and statements. All other forms such as labels, cheques, and tax reports can have any name, and you select those names when you run the relevant options.

We look at customer and supplier documents from two points of view:

- The file names you use
- Where to save the files

File Names

There are many possible different form file names. The format of these names is:

NNNNNNNPPPXYZ.ENG

where:

- NNNNN is the file name. The default names are:
  - CSDOC for all customer and supplier documents
  - CSMTH for customer statements and supplier remittances
  - ISTRF for store transfer documents
  - BOMSLIP for manufacturing pick lists

  As you will see later, you can use different names to create separate layouts for each document type, such as quotations, sales orders, invoices, and so on.

- PPP can be "PDF" or nothing. You use this for forms that you email in PDF format. This lets you have a separate version of each form in PDF format.
- X is the paper type, and can be either C (continuous, for dot-matrix printers) or S (single sheet, for laser and inkjet printers).
- Y is the paper style, and is one of P (plain), R (pre-printed), or H (header pre-printed). It does not apply to store transfer documents:
  - The plain option means the system prints on plain paper. It will print boxes, lines, and all headings.
  - The Pre-printed option means the system prints on paper that usually has lines and boxes pre-printed.
  - The Header pre-printed option means the paper has lines, boxes, and the company information pre-printed.
- Z is an optional identifier you can use if you wish to have separate layouts for tax exclusive and tax inclusive documents. If there is no character, the system uses the same layout for exclusive and inclusive layouts. If you wish to have separate layouts, use I for tax inclusive and E for tax exclusive. This character of the file format is optional, and it does not apply to store transfer documents.
- ENG is the language or country extension. The system runs in multiple languages. We assign a standard extension for each language. For example, if you are using an English version the form file names have an ENG extension. If you use a French version, the extension is FRE.

For all the documents, there are more than one file per document, because the system caters for different combinations of plain, pre-printed, header pre-printed, single, and continuous, paper. For example:

CSDOCCP.ENG	This file is used for customer and supplier documents (CSDOC), printed on continuous paper (C), which is plain paper (P).
CSDOCPDFCP.ENG	This file is for customer and supplier documents (CSDOC) that you send as a PDF email attachment. Note that the system uses the CP at the end according to your normal print settings.
CSMTHCR.ENG	This file is for customer statements and supplier remittances (CSMTH), printed on continuous paper, which is pre-printed (R).

Note The system always needs files with the PDF name for emailing in PDF format. If you wish to use the same layout for emailing and printing, and you customize the print file, open it and save it as the PDF file as well.

As far as the first characters of the form file name (NNNNNNN above) which indicate what type of document (for example invoice, statement) is being printed, there are two groups:

- The ISTRF and BOMSLIP names are the complete names for those documents.
- For the CSDOC and CSMTH names, the file names can expand to more names in a hierarchy.

We look at the latter group in the next section.

Expanding Document, Statement, and Remittance File Names

The system ships as standard with only two file names:

CSDOC	This file is for quotations, sales orders, invoices, credit notes, debit notes, purchase orders, GRNs, supplier invoices, supplier returns, and supplier credits. One of the fields on the layout specifies the document name such as "Invoice", "Credit Note", and so on, which allows a single layout to apply to multiple types of documents. Supporting documents such as delivery notes also use the same layout.
CSMTH	This file is for customer statements and remittances.

There are of course more than two files in total, because the system has to cater for combinations of plain, pre-printed, header pre-printed, single, and continuous, paper. For example:

However, you will invariably use only a single combination of paper style and paper type. Changing one single document therefore usually changes all the related layouts.

The CSDOC and CSMTH files are the most general file names available. The system uses these file names only when it cannot find any other file names. There are additional file names you can use, although they do not exist initially on your system. In fact, there are three levels of file names:

The lowest level, the one that ships as standard, uses one layout for customer and supplier documents, and one layout for customer statements and supplier remittances. This level uses the CSDOC and CSMTH names above.

The next level lets you split customer and supplier documents and have one layout for customer documents, another for supplier documents, another for statements, and another for remittances. The names are:

Name	Supporting Name	Documents
CSTMR	CDELV	Quotations, sales orders, customer invoices, customer credit notes, and customer debit notes.
CMTH		Statements
SUPPL	SUPPD	Purchase orders, GRNs, supplier invoices, supplier returns, and supplier credits.
SMTH		Remittances

The most detailed level lets you have a layout for each customer and supplier document, such as a quote, sales order, purchase order, and so on:

Name	Supporting Name	Documents
CQUOT	CQUOD	Customer quotations
CORDR	CORDD	Customer sales orders
CINVC	CINVD	Customer invoices
CCRDN	CCRDD	Customer credit notes
CDEBN	CDEBD	Customer debit notes
CSPOS		POS invoices
CSLIPI		Slip printer. Note that this file name has no further additions for paper style, or paper type.
CSREC		Receipting module receipts
SORDR	SORDD	Supplier purchase orders
SGRNI	SGRND	Supplier GRN
SINVC	SINVD	Supplier invoices
SRETN	SRETD	Supplier returns
SCRDN	SCRDD	Supplier credits

The system looks for the most detailed name first, and then works backwards until it finds an existing name. Once it finds a name, it uses that file.

When you make a change to a file, or when you create a new file, you always save it in another file. You NEVER save a change in one of the system's standard files. If you do, and you install a program update or upgrade, you will lose your changes. What you do instead is that you retain the full file name, but adjust the file extension by making the third character "Z". For example, in English language versions, the extension is "ENZ" instead of "ENG" (we will use English files throughout as an example).

For example:

- Assume that you are using plain, single sheet paper, and you want to change the format of your quotations. You open CSDOCSP.ENG, make the modification, and then save the file as CQUOTSP.ENZ. When the system prints quotations, it finds the file CQUOTSP.ENZ and uses it. However, when the system prints invoices, the nearest file it finds to use is CSDOCSP.ENG, the standard file we ship, and it uses this file for all other documents.
- If you wish to create a customised form for single sheet pre-printed customer statements, open CSMTHSR.ENG, and save it as CSTATSR.ENZ.

What this means is that if you wish to customise one specific document, you do not have to customise others.

The supporting file name lets you customise the supporting document that you can print for each document. For example, you may print a delivery note as an invoice support document. If you do not create a supporting document name, the system uses the normal document layout to print the supporting document. If you use continuous, multi-part paper, then you would need to use the same layout in any event.

To repeat, although many different form file names are possible, the names are hierarchic. It is quite usual to use only two form files for all your customer and supplier documents.

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Where to Save the Files

Besides the name of the file, the system also searches for file names in specific locations. This gives you additional flexibility if you are using more than one company:

- The system first searches the folder in which the company data resides. It looks for a customised file, in other words a file with an extension ENZ (in the case of English). The system looks for all variations of file names as outlined above. If you wish to make a customisation for one company only, you should save the file in the company data folder.
- If the file is not there, the system searches the CUSTOM\FORMS folder in the program directory for files with the extension ENZ. If you wish to use a customisation for every company in the system, except those companies that have their own ENZ files, you should save the file in this folder.
- If this file is also not there, the system uses its own ENG file in the CUSTOM\FORMS directory.

Once again, the system searches for all possible combinations of forms in each folder. You only have to customise the exact form(s) you require.

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