



Gestix Manual

*Documents
Customization*

Gestix.com

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Note: For complementary information about the subject on this manual, please visit the support page on the Gestix website (<http://www.gestix.com>).

Objective:

This documents has the objective of helping the professional and the user with technical knowledge to customize the layout of the invoicing documents and other logistic documents with the supplied models in the Gestix base.

Requirements:

The following conditions are necessary to execute the steps described in this manual:

- Knowledge of operative system files manipulation, to copy files from one original location or folder to a destiny location or folder. Certain systems demand permissions or safety definitions changes to do this actions.
- Knowledge of HTML files edition from a text editor, being also possible the usage of a HTML edit as long it does not disturb the structure of the commentaries existent in the original template.
- Knowledge of general operation of the Gestix software in the user perspective.
- Access with Administrator privileges to the computer or server where Gestix is installed so you can edit the files that are inside the folders of the software installation.

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Introduction

This manual focus on the possible changes in the invoicing layout, when none of the supplied layouts satisfies the company needs.

If you only want to customize the invoice with the image or logo of your company, you do not need to follow the steps in this manual, before, see the Gestix Configuration Guide to know what you have to do.

What are the HTML templates?

Gestix uses HTML files to control the printed tax documents format associated with logistic and financial documents which is produced.

Those files are simple HTML files, that may use CSS (Cascade Style Sheet)

If you want compatibility with the PDF production internal method the HTML file can not have CSS.

In this HTML files Macros (characters chain that begins with \$) are used, to represent specific fields of the software printed document.

This files can be modified to obtain customized format.

Customizing a Layout

To customize the layout you have to do the following:

1- Choice of the starting model: Try the different models (Standard, Elegance, Blue, Letter, Light, Ticket, Ticket 2, Label Roll, Label Sheet 40) and choose the one who is closer to what you want.

2- Copy the folder that is associated with the chosen model to the folder **Documents** available in the Gestix installation location.

3- Edition of the HTML files in the Documents folder.

4- The file of the Documents folder are for backup purposes.

The following paragraphs indicate the tasks associated to each one of the referred steps.

Choosing the Starting Model

Choose the original model that is more appropriated as starting point. To try the existing models you can create a testing invoice or open a previously registered one.

Later see it without printing, selecting the model and clicking in the Print button.

Duplicating the Templates from the Base Model

To each model there is a folder with the original HTML templates

<i>Model</i>	<i>Folder With The HTML Templates</i>
Standard	c:/programs/gestix/www/html/0
Blue	c:/programs/gestix/www/html/1
Light	c:/programs/gestix/www/html/2
Ticket	c:/programs/gestix/www/html/4
Ticket 2	c:/programs/gestix/www/html/3
Elegance	c:/programs/gestix/www/html/5
Letter	c:/programs/gestix/www/html/6

Note:

-In Mac OS X, replace c:/programs/gestix by /library/gestix

-In Web service, replace c:/programs/gestix by ./public_html/gnet

-In IPBrick replace c:/programs/gestix by ./opt/gestix

-In another Linux distributions replace c:/programs/gestix by /var/lib/gestix.

Copy the correspondent folder to the chosen Model to the folder c:/gestix/documents.

If, for example, you have chosen the Letter model, copy the folder c:/programs/gestix/www/html/6 to c:/programs/gestix/documents/6.

Attention:

If instead of copying the folder to the indicated location, you modify the files in the original folders, your changes will be lost the next time you upgrade Gestix.

Editing the Invoicing Templates

The different Gestix documents are associated, in groups, to distinct HTML files.

<i>Gestix Logistic Documents</i>	<i>HTML File (Template)</i>
Quote, Cost Estimate, Pro Forma, Orders	doc_template_est.html
Invoice, Cash Sale (or Invoice/Receipt), Delivery Note, Return Note	doc_template_inv.html
Credit Note, Debit Note	doc_template_fin.html
Receipt	doc_template_rec.html
Stock Receipt, Stock Release	doc_template_stock.html *
Production Order	doc_template_man.html *
Warehouse Transfer	doc_template_trx.html *

- Not available in all Gestix products.

To change the Invoice layout, edit the file **doc_template_inv.html** (c:/programs/gestix/documents/6/doc_template_inv.html).

Note:

To edit the HTML files is recommended to use a Text editor. Notepad ++, available for free in the Internet, is a good choice because it shows the HTML elements.

As the changes are being made, save the file and try to see it in the printing option on Gestix. This way you can see each step of your changes.

Archiving the Customized Version

To retake the customizing work in case of software transfer, it is recommended to archive the c:/programs/gestix/Documents folder content and save it in a separated place to later use.

Common Macros (Data Base Fields)

The Following Table shows some of the used Macros in the base models. To a complete list, consult the "Data Structure" table in the **Support** page of the **www.gestix.com** website.

<i>Common Macro</i>	<i>What it Represents</i>
\$ent_id	ID/Customer CodeID/
\$ent_name, \$ent_name2	First and Second Line of the Customers Name.
\$adr_1, \$adr_2, \$adr_3, \$adr_4	Main Address.
\$ent_taxid	Taxes Identification Number.
\$ent_cond	Customers Defines Payment Conditions.
\$ent_crdlim	Customer Credit Limit.
\$dhd_ref	Document Reference.
\$dhd_yref	Customer Reference.
\$dhd_terms	Specific Documents Payment Condition.
\$dhd_ser	Document Serial Identification.
\$dhd_loc	Warehouse Code affected by the Document.

Special Macros (Interpreted by Gestix)

The following table identifies special Macros to insert specific elements in the document format.

<i>Special Macro</i>	<i>What it Represents</i>
\$doclogo	Is the Document Header Logo defined by the User (Admin menu Configuration) . If the Printing option is Text Logo this Macro is filled with the content in the field " Text Based Company ID ".
\$doclogo_text	Is the content in the " Text Based Company ID " field only in the case of the logo modality is "Image Based Company ID" .
\$doc_taxes	Is the board of Tax incidence relative to the document.
\$item_no	Order number of the Line/Item in the document.
\$dit_net	In the Line/Item of the document, is the price with the tax included.
\$dit_batch	Line/Item in the document, is the batch (food industry).
\$dhd_loc	Warehouse code affected by the document.