PDF Forms Designer

Passport Software, Inc.
November 04, 2020

The PDF Report Writer, as developed by FyTek, Inc., now works with PBS Forms to provide a method of combining your old PBS format with a new modernized look that is highly customizable. This document explains the following:

- Advantages to using PDF Forms Designer over the previous method.
- How to install the premade forms. PDF forms designer comes with premade formats that you can restore.
- Instructions on customizing your current format to work with PDF Forms Designer. Instructions on modifying one of the premade formats.

INTRODUCTION

There are many advantages to using the PDF Forms Designer technology for forms printing over the older method. Here are a few:

When printing:

1. No alignment necessary.
2. You can use almost any laser or multi-purpose printer – no PCL codes are required.
3. All forms have a generated PDF file suitable for emailing.
4. For printing, use either –PDFP-, –PDF- or Windows printer. –PDFP- and Windows printer prints the form with data and produces a PDF file suitable for emailing. Using –PDF- only produces a PDF file suitable for emailing. The forms will always print collated.
5. The size of each PDF file is smaller.

For both field labels and field data you may:

6. Change the font type, size, color and alignment per field as needed.
7. Change the text background color.
8. Add borders of any size around text using any color.
9. By using a special font use a bar code to print the order number and item number in O/E and the purchase order number and quantity in C/O.
10. Uses the standard PBS forms setup to add and remove fields.

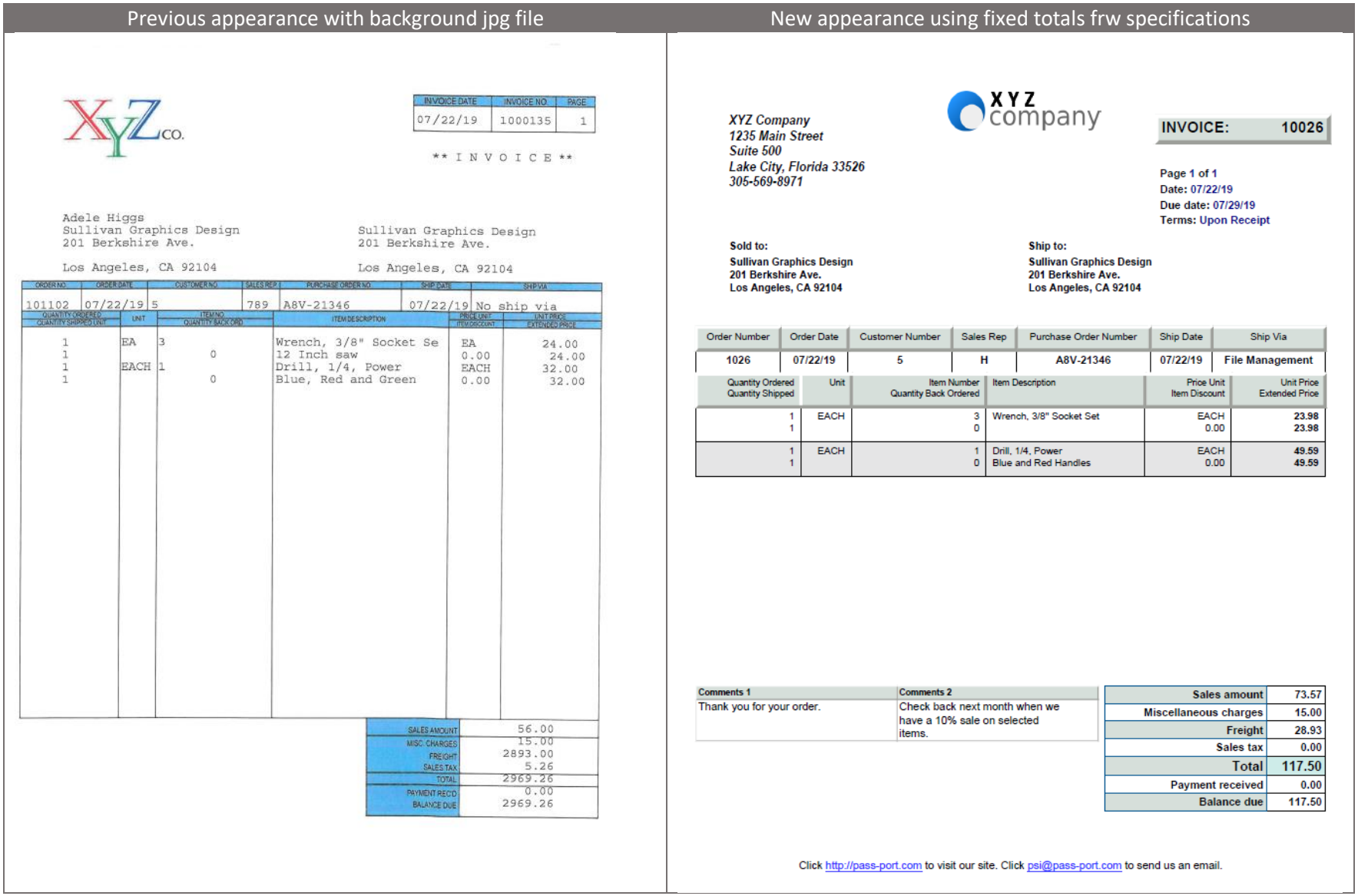
For the PDF Win-forms design:

11. You can add vertical and horizontal lines with different colors and thicknesses.
12. You can add boxes around text and graphic images.
13. You can add multiple graphics per form and place them anywhere on the page.

14. You may add text and ‘clickable’ links to the PDF file for web addresses or email addresses.

Example of the previous format on the left compared to a PDF Forms Designer format:

Previous appearance with background jpg file	New appearance using fixed totals frw specifications



XYZ CO.

INVOICE DATE	INVOICE NO.	PAGE
07/22/19	1000135	1

** I N V O I C E **

Adele Higgs
Sullivan Graphics Design
201 Berkshire Ave.

Los Angeles, CA 92104

Sullivan Graphics Design
201 Berkshire Ave.

Los Angeles, CA 92104

ORDER NO.	ORDER DATE	CUSTOMER NO.	SALES REP	PURCHASE ORDER NO.	SHIP DATE	SHIP VIA
101102	07/22/19	5	789	A8V-21346	07/22/19	No ship via

QUANTITY ORDERED / QUANTITY SHIPPED	UNIT	ITEM NO. / QUANTITY BACK ORD	ITEM DESCRIPTION	PRICE UNIT / ITEM DISCOUNT	UNIT PRICE / EXTENDED PRICE
1	EA	3	Wrench, 3/8" Socket Se	EA	24.00
1		0	12 Inch saw	0.00	24.00
1	EACH	1	Drill, 1/4, Power	EACH	32.00
1		0	Blue, Red and Green	0.00	32.00

SALES AMOUNT	56.00
MISC. CHARGES	15.00
FREIGHT	2893.00
SALES TAX	5.26
TOTAL	2969.26
PAYMENT RECD	0.00
BALANCE DUE	2969.26

XYZ Company
1235 Main Street
Suite 500
Lake City, Florida 33526
305-569-8971

XYZ company

INVOICE: 10026

Page 1 of 1
Date: 07/22/19
Due date: 07/29/19
Terms: Upon Receipt

Sold to:
Sullivan Graphics Design
201 Berkshire Ave.
Los Angeles, CA 92104

Ship to:
Sullivan Graphics Design
201 Berkshire Ave.
Los Angeles, CA 92104

Order Number	Order Date	Customer Number	Sales Rep	Purchase Order Number	Ship Date	Ship Via
1026	07/22/19	5	H	A8V-21346	07/22/19	File Management

Quantity Ordered / Quantity Shipped	Unit	Item Number / Quantity Back Ordered	Item Description	Price Unit / Item Discount	Unit Price / Extended Price
1	EACH	3	Wrench, 3/8" Socket Set	EACH	23.98
1		0		0.00	23.98
1	EACH	1	Drill, 1/4, Power	EACH	49.59
1		0	Blue and Red Handles	0.00	49.59

Comments 1	Comments 2
Thank you for your order.	Check back next month when we have a 10% sale on selected items.

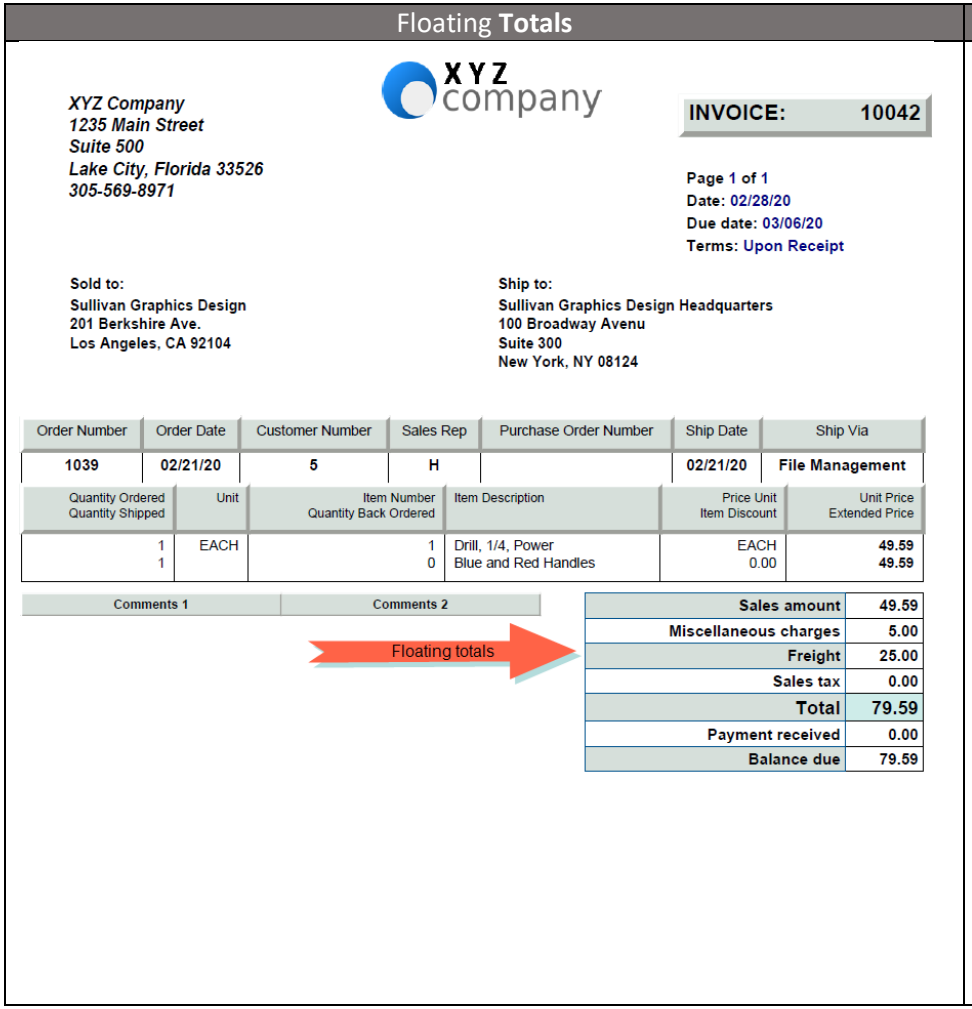
Sales amount	73.57
Miscellaneous charges	15.00
Freight	28.93
Sales tax	0.00
Total	117.50
Payment received	0.00
Balance due	117.50

Click http://pass-port.com to visit our site. Click psi@pass-port.com to send us an email.

Floating Totals and Fixed Totals

Your PDF Forms Designer forms can have either floating totals or fixed totals. With floating totals the totals and comments are directly after the last line item. With fixed totals they are at the bottom of the page. Here is an example of each:

Floating **Totals**



XYZ company

XYZ Company
1235 Main Street
Suite 500
Lake City, Florida 33526
305-569-8971

INVOICE: 10042

Page 1 of 1
Date: 02/28/20
Due date: 03/06/20
Terms: Upon Receipt

Sold to:
Sullivan Graphics Design
201 Berkshire Ave.
Los Angeles, CA 92104

Ship to:
Sullivan Graphics Design Headquarters
100 Broadway Avenu
Suite 300
New York, NY 08124

Order Number	Order Date	Customer Number	Sales Rep	Purchase Order Number	Ship Date	Ship Via
1039	02/21/20	5	H		02/21/20	File Management

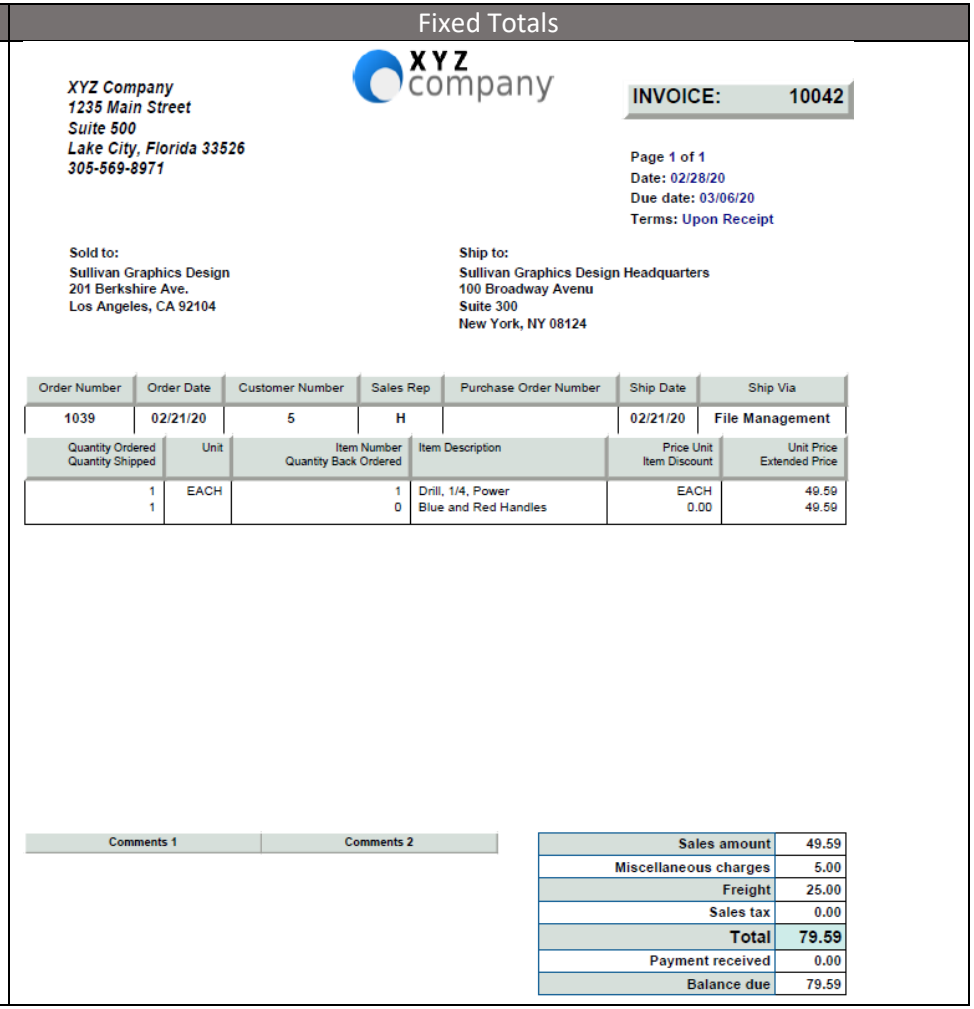
Quantity Ordered / Quantity Shipped	Unit	Item Number / Quantity Back Ordered	Item Description	Price Unit / Item Discount	Unit Price / Extended Price
1 1	EACH	1 0	Drill, 1/4, Power Blue and Red Handles	EACH 0.00	49.59 49.59

Comments 1	Comments 2

Floating totals

Sales amount	49.59
Miscellaneous charges	5.00
Freight	25.00
Sales tax	0.00
Total	**79.59**
Payment received	0.00
Balance due	79.59

Fixed Totals



XYZ company

XYZ Company
1235 Main Street
Suite 500
Lake City, Florida 33526
305-569-8971

INVOICE: 10042

Page 1 of 1
Date: 02/28/20
Due date: 03/06/20
Terms: Upon Receipt

Sold to:
Sullivan Graphics Design
201 Berkshire Ave.
Los Angeles, CA 92104

Ship to:
Sullivan Graphics Design Headquarters
100 Broadway Avenu
Suite 300
New York, NY 08124

Order Number	Order Date	Customer Number	Sales Rep	Purchase Order Number	Ship Date	Ship Via
1039	02/21/20	5	H		02/21/20	File Management

Quantity Ordered / Quantity Shipped	Unit	Item Number / Quantity Back Ordered	Item Description	Price Unit / Item Discount	Unit Price / Extended Price
1 1	EACH	1 0	Drill, 1/4, Power Blue and Red Handles	EACH 0.00	49.59 49.59

Comments 1	Comments 2

Sales amount	49.59
Miscellaneous charges	5.00
Freight	25.00
Sales tax	0.00
Total	**79.59**
Payment received	0.00
Balance due	79.59

Premade Formats

Premade formats are provided.

All the provided formats include the full construction of the invoice and statement.

There are two ways to use a provided format:

1. Assign a PDF Forms Designer file (files with an frw extension in the IMAGES folder) to your existing PBS user definable form. You will likely have to make some changes to either your PBS format or the PDF Forms Designer format file or both. A logo Is assigned in the frw file and will have to be changed. Literal fields will have to be removed from the invoice format and entered in the frw file.
2. Restore PBS form files to PBS using the file utilities and use them with the provided matching frw and csv file (also in the IMAGES folder). Although we tried to make the formats as universal as possible. You will have to change the logo. You may possibly have to add or change fields, font colors, font sizes, etc. The relationship of the PBS format, frw file and csv file is explained later in this document.

Do not use a transparent logo image.

Accounts Receivable Invoices

The formats provided in Accounts Receivable for invoices are the following:

A/R Invoice Format	Type	PDF Forms Designer File	csv file used
20	Simple Invoice	AR20IN.frw	AR20IN.csv
21	Simple Credit Memo	AR21CM.frw	AR21CM.csv
30	Invoice with fixed totals	AR30In-X.frw	ARDFTCSVcsv
31	Invoice with floating totals	AR31In-L.frw	ARDFTCSVcsv
32	Credit Memo with fixed totals	AR32CM-X.frw	ARDFTCSVcsv
33	Credit Memo with floating totals	AR33CM-L.frw	ARDFTCSVcsv

Note: The csv file names and extensions for Linux thin client must be UPPER CASE.

There is a file of invoice formats that work with Report Writer. It is compressed and in the top-level PBS. Extract AR_IVC_forms_designer_00.zip. Run ARUTIL.BAT (A/R file utilities). Select to restore *23. Invoice format file*. If you want to save your existing formats, select A to add records to the file. Otherwise replace the existing formats by selecting C to create new records. For Linux running thin client, there is a AR_IVC_forms_designer_00.tar file to extract and restore.

The default Report Writer frw files are in the IMAGES folder. There is also a default ARDFTCSV.csv file in IMAGES. This is considered a default file and should usually not be changed. However, if you need to change the fields in the csv make a copy and name it to match your frw file name.

Invoice formats (General appearance)
Here is an example of a format with an frw file:

```
11. Use pre-printed forms ?                    Y
    Print using graphic image? Y  File name: ar20in.frw
```

Accounts Receivable Statements

The formats provided in Accounts Receivable for statements are the following:

A/R Statement Format	Type	PDF Forms Designer File	csv file used
21	V6-1 PDF Forms Designer	ST6F2-t.frw	STDFTCSV.csv
22	V6-2 PDF Forms Designer	ST6F2-T.frw	STDFTCSV.csv
23	V6-1 PDF Forms Des Float	ST6F2-F.frw	STDFTCSV.csv
24	V6-2 PDF Forms Des Float	ST6F2-F.frw	STDFTCSV.csv

A/R Statement Forms Design formats are in the AR_STM_forms_designer_00.zip file. Extract it and restore the A/R Format using ARTUTIL.BAT (A/R file utilities). Login and select to restore *27. Statement form file*. If you want to save your existing forms, select A to add records to the file. Otherwise, replace the existing formats by selecting C to create new records. For Linux running thin client, there is a AR_STM_forms_designer_00 .tar file to extract and restore.

STDFTCSV.csv is the default csv file for A/R statements. If you need to change the fields in the csv make a copy and name it to match your frw file name.

Order Entry

For O/E there are two types of formats:

1. Floating totals are totals that print immediately after the lines. Where ever the lines and comments end, that is where the totals print.
2. Fixed totals are totals that print at the bottom of the page. It is similar to traditional PBS forms. The example on the previous page has fixed totals.

The formats provided for Order Entry include:

O/E Format	Type	PDF Forms Designer File	csv file used
1L	C = Credit Memo - floating totals	oe-cm-L.frw	OEDFTCSV.csv
1L	I = Invoice - floating totals	oe-inv-L.frw	OEDFTCSV.csv
1L	L = Loan – floating totals	oe-lon-L.frw	OEDFTCSV.csv
1L	O = Order - floating totals	oe-ord-L.frw	OEDFTCSV.csv
1L	Q = Quote - floating totals	oe-qte-L.frw	OEDFTCSV.csv
1L	R = RMA – floating totals	oe-rma-L.frw	OEDFTCSV.csv
1L	T = Rental – floating totals	oe-rnt-L.frw	OEDFTCSV.csv
1X	C = Credit Memo - fixed totals	oe-cm-X.frw	OEDFTCSV.csv
1X	I = Invoice - fixed totals	oe-inv-X.frw	OEDFTCSV.csv
1X	L = Loan – fixed totals	oe-lon-X.frw	OEDFTCSV.csv

O/E Format	Type	PDF Forms Designer File	csv file used
1X	O = Order - fixed totals	oe-ord-X.frw	OEDFTCSV.csv
1X	Q = Quote - fixed totals	oe-qte-X.frw	OEDFTCSV.csv
1X	R = RMA – fixed totals	oe-rma-X.frw	OEDFTCSV.csv
1X	T = Rental – fixed totals	oe-rnt-X.frw	OEDFTCSV.csv
1PT	I and O for a Picking ticket	oe-pt.frw	oe-pt.csv

Note: The csv file names and extensions for Linux thin client must be UPPER CASE.

O/E Forms Design formats are in the OE_IVC_forms_designer_00 .zip file. Extract it and restore the O/E Format using OEUTIL.BAT (O/E file utilities). Login and select to restore *2. O/E forms file*. If you want to save your existing forms, select A to add records to the file. Otherwise, replace the existing formats by selecting C to create new records. For Linux running thin client, there is a OE_IVC_forms_designer_00 .tar file to extract and restore.

OEDFTCSV.csv is the default csv file for Order Entry. If you need to change the fields in the csv make a copy and name it to match your frw file name.

Customer Orders

Customer orders has these forms:

C/O Format	Type	PDF Forms Designer File	csv file used
ACK	Acknowledgement	COAF.frw	CODFTCSV.csv
BOL	Bill of Lading – I type	cobfl.frw	COBFL.csv
BOL	Bill of Lading – O type	cobfl.frw	COBFL.csv
CM	Credit Memo	cocfl.frw	CODFTCSV.csv
INV	Invoice – I type	coifl-L.frw	CODFTCSV.csv
INV	Invoice – O type	coifl-L.frw	CODFTCSV.csv
PKLST	Packing list – O type	copfl.frw	COPFL.csv
QTE	Quote	coqfl.frw	CODFTCSV.csv

CODFTCSV.csv is the default csv file for Customer Orders. The Bill of Lading and Packing List use a custom csv file.

C/O Forms Design formats are in the CO_IVC_forms_designer_00 .zip file. Extract it and restore the C/O Format using COUTIL.BAT (C/O file utilities). Login and select to restore *25. C/O forms file*. If you want to save your existing forms, select A to add records to the file. Otherwise, replace the existing formats by selecting C to create new records.

Point of Sale

For Point of Sale there are two types of formats:

1. Floating totals are totals that print immediately after the lines. Where ever the lines and comments end, that is where the totals print.
2. Fixed totals are totals that print at the bottom of the page. It is similar to traditional PBS forms. The example on the previous page has fixed totals.

The formats provided for Point of Sale include:

P/S Format	Type	PDF Forms Designer File	csv file used
PSF	C = Credit Memo - floating totals	ps-cm-L.frw	PSDFTCSV.csv
PSF	I = Invoice - floating totals	ps-inv-L.frw	PSDFTCSV.csv
PSF	L = Layaway – floating totals	ps-lay-L.frw	PSDFTCSV.csv
PSF	O = Order - floating totals	ps-ord-L.frw	PSDFTCSV.csv
PSF	Q = Quote - floating totals	ps-qte-L.frw	PSDFTCSV.csv
PSF	R = Return – floating totals	ps-rtn-L.frw	PSDFTCSV.csv
PSX	C = Credit Memo - fixed totals	ps-inv-X.frw	PSDFTCSV.csv
PSX	I = Invoice - fixed totals	oe-inv-X.frw	PSDFTCSV.csv
PSX	L = Layaway– fixed totals	ps-lay-X.frw	PSDFTCSV.csv
PSX	O = Order - fixed totals	ps-ord-X.frw	PSDFTCSV.csv
PSX	Q = Quote - fixed totals	ps-qte-X.frw	PSDFTCSV.csv
PSX	R = Return – fixed totals	ps-rtn-X.frw	PSDFTCSV.csv

Note: The csv file names and extensions for Linux thin client must be UPPER CASE.

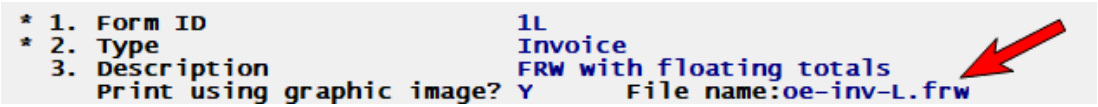
These formats are in the PS_IVC_forms_designer_00 .zip file. Extract it and restore the P/S Format using PSUTIL.BAT (P/S file utilities). Login and select to restore *31. POS form layout file*. If you want to save your existing forms, select A to add records to the file. Otherwise, replace the existing formats by selecting C to create new records. For Linux running thin client, there is a PS_IVC_forms_designer_00 .tar file to extract and restore.

Receipt forms are also included as well in the export file. Note that receipt type Designer forms are not included with Forms Designer. This is because receipts are continuous feed. Designer forms will not function with continuous feed forms. If using receipts, you can use the hard coded forms or design a custom form if needed.

PSDFTCSV.csv is the default csv file for Point of Sale. Never alter the default csv file. You may copy and change it if needed. If you need to change the fields in the csv, make a copy and name it to match your frw file name. Example: if your frw is named ps_inv.frw, and you copied and modified the default csv file, the csv file must be name ps_inv_csv. Never modify the default csv file for any module. Note: The csv file names and extensions for Linux thin client must be UPPER CASE.

Assigning an frw File to your Form

Go to PBS forms and enter one of the frw file names from above in the *File name:* field:



Logo Replacement and Placement

For changing the logo, open the frw file in the IMAGES folder (in this case it is oe-inv-X.frw) and look for this:

```
<TEXT X=32 Y=0>

<! This is where you enter images that are used when producing the PDF.>
<IMG SRC="IMAGES\generic.logo.png" WIDTH=140 HEIGHT=40 CACHE>
```

The logo is named generic.logo.png. Change the name to your logo fie name. Our example is a png file type, but it can be a jpg as well. Put your logo into the IMAGES folder. You will probably have to change the WIDTH and HEIGHT for your logo to get the correct proportional sizing. You determine the correct size by doing test printings and changing either the WIDTH or HEIGHT number. If you get an error 135, that means your image is too large. Make it smaller in size.

If your logo includes your address, the company fields can be removed and the logo can be moved to the left. You can simply delete or 'comment out' the company table section. Just above the logo image there is a TEXT X=32. Change that to TEXT X=0 and the logo is moved all the way to the left. The Y value is set to the top of the printable area. Enter a number other than zero to move it down the page.

Do not use a transparent logo image.

PDF Forms Designer and Virus Protection

With PDF Forms Designer a group of new executable programs are installed on your system. We have found an issue with the new forms printing and Norton virus protection. This may occur with other virus protection softwares as well. The new executable programs are in the PSIOBJ folder. Please make this folder excluded from virus scanning. There are options such as thin client, where virus protection is not as needed on the server.

Altering the cblconfi file for Windows and Linux Thin client

Windows

Altering the cblconfi file is not required for Windows systems. If you do not alter the cblconfi file PDF Forms Designer defaults to 32 bit.

In the top level of the PBS folder there is a file called cblconfi. In order to use the 64 bit version of PDF Forms Designer forms, you must add a line to the cblconfi file. It is recommended that you use the default of 32. However, in order to try the 64 bit variable, open the cblconfi file with a text editor and anywhere in the file include this variable:

FYTEK_OS_VER 64

Save it. You must restart PBS in order for this setting to take effect.

Linux

Thin client is required to use PDF Forms Designer in Linux. Using Linux thin client you must determine if you have a 64 bit or 32 bit server. Enter the command uname –m. Then you must add the following to the cblconfi file. It the example below the Linux server is 64 bit:

Processing Forms Designer pdf's with either 32 or 64 bit Linux servers.

```
# FYTEK_OS_VER 32
  FYTEK_OS_VER 64
# FYTEK_OS_VER
```

Save the cblconfi file and restart PBS.

Note the PDF Forms Designer is not available for Linux at this time.

Designing your PBS Form and PDF Forms Designer Format

The examples used in the description of PDF Forms Designer is from Order Entry. This structure is similar to other PBS modules that use the PDF Forms Designer. Currently these include A/R Invoices, C/O Invoices, P/S Invoices and P/O Purchase Orders.

This manual explains many available functions for modifying forms. We recommend that you learn this document first. For more details on these features and many features that are not being used, see the PDF Report Writer Documentation as developed by FyTek, Inc.

A video, as developed by FyTek, is accessible at https://www.youtube.com/watch?v=YSpJqQU1kSY and is called Report Writer part 1.

Field Assignment and Formatting

Creating a custom format requires understanding the relationship of the existing PBS format with the commands in the PDF Forms Designer files. The PDF Forms Designer and the PBS programs blend the PBS forms settings with two Report Writer text files into a PDF file. The PBS forms setup selects the fields you wish to use. The Report Writer frw files contain some formatting instructions.

The PDF Forms Designer forms are a combination of the PBS format, an .frw formatting file and a corresponding .csv file. This is what each provide and how they are used:

File	Where accessible	Description

PBS Format	On the PBS menu	As in the past, each format is accessed from a PBS menu which contains the assigned fields, field lengths and other specifications. You may utilize the same format that you are currently using and assign a premade frw file to that format. When doing this, the PDF Forms Designer frw file determines the placement of the fields on a page, not the PBS format.
		Your PBS form may be fine as it is, or it may require some minor tweaking.
		To use the PDF Forms Designer you must assign an frw file to the PBS format. Here is an example of an frw file assigned to an O/E format:
		`3. Description FRW with fixed totals`
		`Print using graphic image? Y File name:oe-inv-X.frw`

????.frw file	IMAGES (folder)	The frw files are located in the IMAGES folder. An frw file is a text file with an extension of frw that contains html. For example oe-inv-L.frw is an invoice format for O/E. The frw file contains the formatting of the PBS data and the formatting of tables.

File	Where accessible	Description
		• Data and table formatting can be varied by color, size, placement and more. Fonts may have normal, bold, italics or italics-bold settings. You may assign a background color for a font. Several fonts are provided with the PDF Forms Designer. If needed, you may provide your own fonts. • You can also include words and symbols that do not originate from PBS. These include graphics, text, web site links and email links. • As Passport has provided frw files for all the O/E forms types, you may only have to alter them by providing your logo and possibly the colors.
????.csv file	IMAGES (folder)	The csv files are located in the IMAGES folder. The standard O/E csv file name is OEDFTCSV.csv. The defaults for other modules are the same name except the first two letters. For example the A/R invoices default is ARDFTCSV.csv. This file groups data into datasets and determines the dataset where a PBS field is used. You should not alter the default csv file at all. The next section explains what you would do if you copied the default csv file and customized it.

DataSets

In an frw file, settings are grouped into dataset IDs. In most cases, one entry in the frw file represents a set of fields. However, individual fields can be assigned to an frw file as well.

Datasets have corresponding columns in the csv file. These are the datasets:

PBS Forms Section	FRW file DATASET ID	CSV description	CSV mapping to frw file	Description
Headers	comp	Company Header	_00COMPNAME1	This contains the name and address fields from Company information.
Headers	billto	Bill to Header Ship to Header	_05BILLTONAME1 _06SHIPTONAME1	This provides all the bill-to and ship-to fields.
Headers	(none)	Misc Header	Individual fields from csv. *	This includes fields like invoice number, ship date, P.O. number, sales rep, order number, etc. They can be part of a table or entered one at a time.
Line items	dtl	Cell1 Body Column 1 Cell2 Body Column 2 Cell3 Body Column 3 Cell4 Body Column 4 Cell5 Body Column 5 Cell6 Body Column 6	_01CELLBDYCOL1 _02CELLBDYCOL2 _03CELLBDYCOL3 _04CELLBDYCOL4 _05CELLBDYCOL5 _06CELLBDYCOL6	This makes up the body lines. The dtl dataset contains csv columns (also known as a Body Column). Each column has various assigned fields. Quantity ordered, item number, item description and price are a few examples of the available fields. Each field is only listed once in the csv. The fields in each column can be moved from one column to another, depending on where they are needed.

PBS Forms Section	FRW file DATASET ID	CSV description	CSV mapping to frw file	Description
Totals	cmt	Comments footer 1 Comments footer 2	_24COMMENT1 _25COMMENT2	These are the comments dataset. There are two comment cells. Comments 1 is used for O/E order comments and comments 2 for O/E Default comments.
Totals	ttl	Totals Footer	Individual fields from csv. *	This is the totals set. Totals include invoice total, invoice discount percent, discount amount, miscellaneous charges, tax amount, grand total, payment applied, total due after payment and more.

* The 'Form Fields' appendix for each affected module describes each field. See PBS Field Names to FRW Field/Table Names.

Data Relationships Examples for Building Forms

There is a specific relationship between the frw file, the csv data fields, and PBS Form Fields that go into producing the pdf or printed output. Here is the location of each data type: frw file – IMAGES folder, csv file – IMAGES folder, PBS Format Fields – O/E Master information > Forms.

NOTE: The fields must be assigned in the PBS format or they will not print on the form. However, the exact location of the fields in the PBS format is not important. Putting each field in the general location near to where it is expected to print in the PDF output provides organization and reduces confusion. However, the frw ultimately determines the location where the fields and tables print on a PDF page.

Below are some examples taken from PBS O/E Form 1L – Invoice type using the oe-inv-L.frw data and OEDFTCSV.csv file.

Company information Company Fields for Order Entry

Command Lines in oe-inv-L.frw. _00COMPNAM1 is the table name for the company fields.

```
<TABLE X=4 X2=27 WIDTH=25 Y=3 CELLPADDING=1 VALIGN=T>
<DATASET ID=comp>
<TR ALIGN=L COMPTEXT=ON FACE=11 SIZE=12>
<TD ALIGN=L VALIGN=Top WIDTH=25 NOWRAP>
<&_00COMPNAME1>
</TD>
</TR>
</DATASET>
</TABLE>
```

Fields available in OEDFTCSV.csv

Company Header
023|H|Company display name
024|H|Company report name
025|H|Company address 1
026|H|Company address 2
027|H|Company address 3
028|H|Company phone number

Company Header
_00COMPNAME1

PBS Form Fields Selected in 1L– 'I' type format. Asterisk indicates utilized fields.

```
31.*Company address 1
32.*Company address 2
33.*Company address 3
34.*Company display name
35.*Company phone number
36. Company report name
```

pdf Output

XYZ Company
1235 Main Street
Suite 500
lake City, Florida 33526
305-569-8971

The company name and address does not have to come from PBS Company information. Here are two other ways to add your address:

- The address can be part of the logo image.
- The address can be entered as text in the frw file. In this example the company name and address is entered in the frw file. The advantage to is that it also includes a web site address. When generated as a PDF the web address becomes a clickable link:

```
</TEXT>
<TEXT X=4 Y=4>
<ALIGN VALUE=L><FONT SIZE=10 COMP=105 FACE=11 FONT COLOR=NAVY>
Passport Software, Inc.<BR>
181 Waukegan Road, #200<BR>
Northfield, IL 60093<BR>
847.729.7900 <BR>
<A HREF="http://pass-port.com/">pass-port.com</A> <BR>
</TEXT>
```

Passport Software, Inc.
181 Waukegan Road, #200
Northfield, IL 60093
847.729.7900
pass-port.com

Bill-to Fields

Command Lines in oe-inv-L.frw. *05BILLTONAME1* is the table name for the bill-to name and address field.	**Fields available in OEDFTCSV.csv**
<TABLE CELLPADDING=2 X=4 X2=80 Y=19 VALIGN=T FCOLOR=BLACK BGCOLOR=WHITE> <TH COLSPAN=2 ALIGN=L FACE=5 SIZE=10> <TD>Sold to:</TD> <TD>Ship to:</TD> </TH> <DATASET ID=billto> <TR COLSPAN=2 FACE=5 SIZE=10 FCOLOR=BLACK VALIGN=bottom> <TD ALIGN=L VALIGN=Top WIDTH=40 NOWRAP><&_05BILLTONAME1></TD> <TD ALIGN=L VALIGN=Top WIDTH=40 NOWRAP><&_06SHIPTONAME1></TD> </TR> </DATASET> </TABLE>	Bill to Header 005|H|Bill-to name 006|H|Bill-to address 1 007|H|Bill-to address 2 008|H|Bill-to address 3 132|H|Bill-to country 136|H|Bill-to address 4 137|H|Bill-to city ste zip 138|H|Bill-to city 139|H|Bill-to state 140|H|Bill-to zip code 141|H|Bill-to county Bill to Header _05BILLTONAME1
PBS Form Fields Selected in 1L – 'I' type. Asterisk indicates utilized fields.	**Pdf Output**
4.*Bill-to address 1 5.*Bill-to address 2 6.*Bill-to address 3 7. Bill-to address 4 8. Bill-to city 9.*Bill-to city,ste,zip 10. Bill-to country 11. Bill-to county 12.*Bill-to name 13. Bill-to state 14. Bill-to zip code	Sold to: Sullivan Graphics Design 201 Berkshire Ave. Los Angeles, CA 92104

Note: In the example above the words *Sold to:* are entered in the frw file. As you can see in the lower right corner these words print in the PDF just above the address. In most cases, try to avoid text entries like *Sold to:* into a PBS format. If you have text entries, remove them. It is much easier to predict the location and look of text when entered into the frw file. The only exception is, you will need text from PBS when assigning a field in the comments section.

The bill-to and ship-to information must be side by side on the form. You cannot put other fields in the same area.

Ship-to Fields

Command Lines in oe-inv-L.frw. *05SHIPTONAME1* is the table name for the ship-to name and address field.

```
<TABLE CELLPADDING=2 X=4 X2=80 Y=19 VALIGN=T FCOLOR=BLACK BGCOLOR=WHITE>
<TH COLSPAN=2 ALIGN=L FACE=5 SIZE=10>
<TD>Sold to:</TD>
<TD>Ship to:</TD>
</TH>
<DATASET ID=billto>
<TR COLSPAN=2 FACE=5 SIZE=10 FCOLOR=BLACK VALIGN=bottom>
<TD ALIGN=L VALIGN=Top WIDTH=40 NOWRAP><&_05BILLTONAME1></TD>
<TD ALIGN=L VALIGN=Top WIDTH=40 NOWRAP><&_06SHIPTONAME1></TD>
</TR>
</DATASET>
</TABLE>
```

Fields available in OEDFTCSV.csv

Ship to Header
073|H|Ship-to name
074|H|Ship-to address 1
075|H|Ship-to address 2
076|H|Ship-to address 3
142|H|Ship-to address 4
143|H|Ship-to city ste zip
144|H|Ship-to city
145|H|Ship-to state
146|H|Ship-to zip code
147|H|Ship-to county
133|H|Ship-to country
127|H|Ship-to phone

Ship to Header
_06SHIPTONAME1

PBS Form Fields Selected in O/E format 1L – 'I' type. Asterisk indicates utilized fields.

```
102.*Ship-to address 1
103.*Ship-to address 2
104.*Ship-to address 3   109. Ship-to county
105. Ship-to address 4   110.*Ship-to name
106. Ship-to city        111. Ship-to phone
107.*Ship-to city,st zip 112. Ship-to state
108. Ship-to country     113. Ship-to zip code
```

PDF output

Ship to:

Sullivan Graphics Design
201 Berkshire Ave.
Los Angeles, CA 92104

PBS Field Names to FRW Field/Table Names

There is a specific relationship of the PBS Format fields to the PDF Forms Designer field and table names. This relationship needs to be understood when modifying a PDF Forms Designer frw format. The csv file for each module form has the Forms Designer field and table information. The PBS form fields and the corresponding PDF Forms Designer field and table names in the csv file are included in the following documentation:

A/R: Invoice Format Design Kit

A/R: Statement Format Design Kit

O/E: O/E Form Fields Appendix

P/S: P/S Form Fields Appendix

C/O: C/O Form Fields Appendix

PDF Forms Designer FRW File Settings and Commands

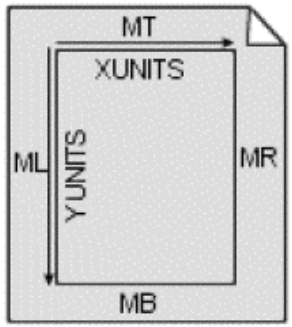
There are many commands available with the PDF Forms Designer for formatting your PDF file. All the commands are explained in the PDF Report Writer document. PBS does not use all of these commands. This section includes most command options used with PBS forms.

Printable Area and Grid Settings

The usable area on a page is determined by the margin settings. At the top of every frw file is the grid size. The tags for the grid include:

ML = Margin left, MR = Margin right, MT = Margin top, MB = Margin bottom. The value is always in inches.

The columns and rows are determined by XUNITS and YUNITS numbers. Across the page is the 'X coordinate' and 'Y' is the down coordinate. The X coordinate determines the number of columns for the printable area where Y determines the number of rows. They are not the same as rows and columns used for designing the location of data on the old PBS forms.



This is an example of these settings:

<GRID ML=.25 MR=.25 MT=.25 MB=.25 XUNITS=80 YUNITS=100>

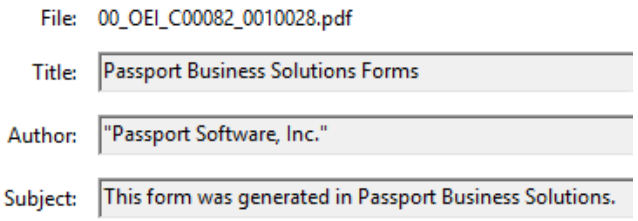
In the example above the left, right, top and bottom borders are all set to .25 inches. The number of X columns is 80 and the number of Y rows is 100. That makes the grid 80 by 100.

The printable area is the top margin plus the bottom margin minus the page height. The number of rows (Y number) is divided into this number to determine the row height.

The printable area is also the left margin plus the right margin minus the page width. The number of columns (X number) is divided into this number to determine the column width. The X and Y numbers are entered in the frw file to determine the location of where data is printed on the form. Whole numbers are not required. For example if you want something to print between row 15 and 16, as an example, enter Y=15.5.

PDF Properties

There are fields where you can enter the properties of your PDF file. Here is an example of the default PDF properties as viewed in Adobe Acrobat DC.



The properties are set in the frw file using these settings:

```
<! This data is written to the properties of each PDF.>
<TITLE>Passport Business Solutions Forms</TITLE>
<SUBJECT>This form was generated in Passport Business Solutions.</SUBJECT>
<AUTHOR>Passport Software, Inc.</AUTHOR>
<CREATOR>Passport Software, Inc.</CREATOR>
```

If needed, modify the title, subject and author.

Text and Table Tags

To designate the characteristics and position of lines and fonts use these tags:

Tag	Short description	Additional description	Example
 	Insert a line break	In our printable area example, the YUNITS=100. So, one would be 1/100th of the printable area on the page. A line break can have a specific value. For example <BR Value=.05> would be a much smaller line break.	 or <BR Value=.05>
X & Y	Position on a page	X and Y determine the vertical and horizontal settings where the text prints on a page. Whole numbers can provide the correct location. Decimals provide more subtle changes.	<TEXT X=59 Y=10>

Tag	Short description	Additional description	Example
FACE	Font	Fourteen font choices are built into the PDF Forms Designer. Use a Face number from the Fonts section below. All the examples in this document use one or more of the build-in fonts. Some bar code fonts are also provided. Bar code fonts work with O/E order numbers and item numbers only. Only the Code 39 font is functional. Here is an example from the oe-pt.frw: <BARCODE FACE="f3of9x" HEIGHT=24 VALUE="<&_07ORDERNOBARCOD>" TYPE="Code39">"> You may use the ADDFONT tag to add your own TrueType, OpenType or Type 1 font. See the PDF Report Writer document for details.	FACE=2
SIZE	Font size	This is the point size. The point sizes that work best on a form are 8, 9, 10 and 11. Smaller and larger sizes may be appropriate in certain circumstances.	SIZE=10
FONT COLOR or FCOLOR	Font color	Enter a name or number for the font color. This can be pantone number. There are hundreds of color options as seen in the Colors section below	FONT COLOR=REFLEXBLUE FCOLOR=Blue
COMP	Font compression	Enter a percentage to compress text. A value less than 100 compresses the text, where a value more than 100 expands the text.	COMP=90
COMPTEXT		This setting automatically compresses the font if the data is too long to fit in the space provided.	
BGCOLOR	Background color behind the font	Background colors are usually used when printing data a table cell. The same number of color options applies as FCOLOR tag.	BGCOLOR=317
3D	Three dimensions	This gives the cell background a 3 dimensional look.	3D
&page	Page number	Current page number prints when this tag is present.	&page
&totpage	Total pages	Total number of pages print when this tag is present.	&totpage
<!	For inactive tags or comments	An exclamation point to the right of a < sign indicates that the line is not active or used for informational comments.	See below:

Informational comments are inactive and there for help in designing a form. This is an example:

Tag lines can be made inactive by adding the ! symbol. This is an inactive tag line:

Table Tags

Tables contain groups of related data.

These table tags that are used in the frw file to determine the beginning and ending of tables, header, rows and footer:

Tag	Short description	Additional description
<TABLE>	Start of Table	This determines the starting point of a table.
TABLE/>	End of Table	This determines the ending point of a table.
<TH>	Table Header Start	This is the start of a table header row.
<TH/>	End of Table Header	This is the end of a header row.
<TD>	Start of Table Data	The table data tags determine the start <TD> and end <TD/> of the table data. They can be used as label text and to represent the PBS data field or data group.
<TD/>	End of Table Data	See above.
<TR>	Table Row	This is similar to the <TH> tag. These are used with the data fields from PBS.
<TR/>	End of Table Row	This is the end of a table row.
<TF>	Table Footer	This is the beginning of a table footer row.
<TF/>	End of Table Footer	This is the end of a table footer row.

Other Table Tags

These table tags are variable and are used with an equal sign and a value:

Tag	Short description	Additional description	Example
X, X2 and Y	For placing tables on a page. Note: X and Y are also used for placing text on a page.	X is the starting left position on the page. X2 is ending right position. Y is the down position from the top of the page. In the example on the right, the table starts at column 8. It ends at column 40 and it starts are row 60.	X=8 X2=40 Y=60
COLSPAN	Column span	This is the number of columns in a table.	COLLSPAN=7
CELLPADDING	Cell padding	This is the space around the data in a cell.	CELLPADDING=4
WIDTH	The width of a table.	A table width should never be larger than the maximum size as determined by the grid. The table width can be less than the maximum page width. If you have two tables side by side, the combined width cannot be more than 80 (when 80 is the number of columns). One table could be 30 and the other 50.	WIDTH=25
ALIGN	This determines where the text is located in a cell.	The options are **L**eft, **R**ight, **C**enter and **J**ustified.	ALIGN=R

Tag	Short description	Additional description	Example
VALIGN	Entered as either Top, Center, Left or Right.	This is the vertical position of the text in one cell or a group of cells.	VALIGN=Center
BORDER	This is usually a small number	This is the numeric thickness of the border around a cell.	BORDER=.2
BORDERCOLOR	Specify the color for a border.	When not specified, the default is BLACK.	BORDERCOLOR=541
STRIPE	Produces a zebra stripe pattern.	Stripes are usually used with body lines to have alternating colors. In the example white prints first and 427, which is light green, prints second.	STRIPE=427,White
STRIPEX	How much of the table is affected.	Normally the percentage is 0 to 100.	STRIPEX=0,100
NOWRAP	This determines text wrap.	It is used when there is limited space. If the data is larger than can fit, the font is automatically made smaller to force a fit.	NOWRAP

Sold-to and Ship-to Location

When you want to fit the address field in an envelope window you may need to change the location of the sold-to and ship-to fields. Here is an example of a setting that provides the moving to the right, the sold-to and ship-to address fields:

```
81
82 <! Bill to and ship to table.>
83
84 <TABLE X=10 WIDTH=70 Y=16 VALIGN=T FCOLOR=BLACK BGCOLOR=WHITE>
85 <TH ALIGN=L FACE=5 SIZE=9>
86 <TD>Sold to:</TD>
87 <TD>Ship to:</TD>
88 </TH>
89 <DATASET ID=billto>
90 <TR X=10 COLSPAN=2 FACE=5 SIZE=10 WIDTH=70 FCOLOR=BLACK VALIGN=bottom>
91 <TD ALIGN=L VALIGN=Top WIDTH=35 NOWRAP COMP=70><&_05BILLTONAME1></TD>
92 <TD ALIGN=L VALIGN=Top WIDTH=35 NOWRAP COMP=70><&_06SHIPTONAME1></TD>
93 </TR>
94 </DATASET>
95 </TABLE>
```

Notice that the overall width is 70 and the width is 35 for both the sold-to and ship-to. There is an X setting of 10. Remember that the overall width of 70, plus the X setting of 10 equals 80. The maximum grid XNITS is 80 so those number should never add up to more than that.

Table Examples

This sections contains examples of the miscellaneous header, body and totals with comments. The miscellaneous header contains the most details. These details are applicable to the body and totals sections.

Miscellaneous Header Table

A miscellaneous header contains information like the order number, purchase order number, customer number, sales rep and more. It is normally the last piece of information before the body.

Here is an example of frw text tags used for a table that contains miscellaneous header information. In consist of the starting table and ending table tags. After the start the top area has the field names and the bottom designates the data that comes from PBS:

```
<TABLE CELLPADDING=6 BORDER=2 WIDTH=080>
<TH COLSPAN=7 X=2 ALIGN=C COMPTEXT=ON FACE=2 SIZE=9 FCOLOR=black BGCOLOR=441 3D VALIGN=TOP BORDERCOLOR=277>
<TD>Order Number</TD>
<TD>Order Date</TD>
<TD>Customer Number</TD>
<TD>Sales Rep</TD>
<TD>Purchase Order Number</TD>
<TD>Ship Date</TD>
<TD>Ship Via</TD>
</TH>
<TR ALIGN=C FACE=5 SIZE=10 BORDER=.5 COMPTEXT=ON FCOLOR=BLACK BGCOLOR=WHITE VALIGN=BOTTOM BORDERCOLOR=BLACK>
<TD ALIGN=C><&_07ORDERNO>
</TD>
<TD ALIGN=C><&_08ORDERDAT></TD>
<TD ALIGN=C><&_09CUSTNO></TD>
<TD ALIGN=C><&_10SALESREP></TD>
<TD ALIGN=C><&_11PONO></TD>
<TD ALIGN=C><&_12SHIPDAT></TD>
<TD ALIGN=C><&_16SHIPVIADESC></TD>
</TR>
</TABLE>
```

Starting Table Tags

The table above starts with these settings:

```
<TABLE CELLPADDING=6 BORDER=2 WIDTH=080>
```

<TABLE indicates that this is a start of a table. The settings on this line apply to the entire table. CELLPADDING=6 is the space around the data, BORDER=2 is the width of the cell line and the WIDTH=80 is with width of the table. Note that settings like CELLPADDING and BORDER can be different per table cell. The total width of the form is 80 so that means the table goes all the way across the page.

Other Table Header Tags

This is an example of some additional table header tags:

```
<TH COLSPAN=7 X=2 ALIGN=C COMPTEXT=ON FACE=5 SIZE=9 FCOLOR=black BGCOLOR=441 3D VALIGN=bottom BORDERCOLOR=277>
```

<TH> is a tag that indicates these are settings for a table header.

The table header contains these formatting tags. COLSPAN=7 the number of columns or cells is 7. The X=2 indicates it is on the second column on the page. The text alignment is ALIGN=C for center. The face or font type is FACE=5. The font size is SIZE=9 and the font color is FCOLOR=black. The vertical alignment of the text (VALIGN) is at the bottom of the cell. The background color of the text is BGCOLOR=441. This is a light green. The cell BORDERCOLOR=277. A table of colors is at the end of this document. The 3D tag gives the border has a raised look.

Table Field Names and Tags

Next the table field names are defined:

```
<TD>Order Number</TD>
<TD>Order Date</TD>
<TD>Customer Number</TD>
<TD>Sales Rep</TD>
<TD>Purchase Order Number</TD>
<TD>Ship Date</TD>
<TD>Ship Via</TD>
</TH>
```

<TD> starts the table data column. The field name is next. The </TD> ends the table data. The </TH> tag indicates the end of the table header.

The table header tags are combined with the table data tags. When printed to a pdf it looks like this:

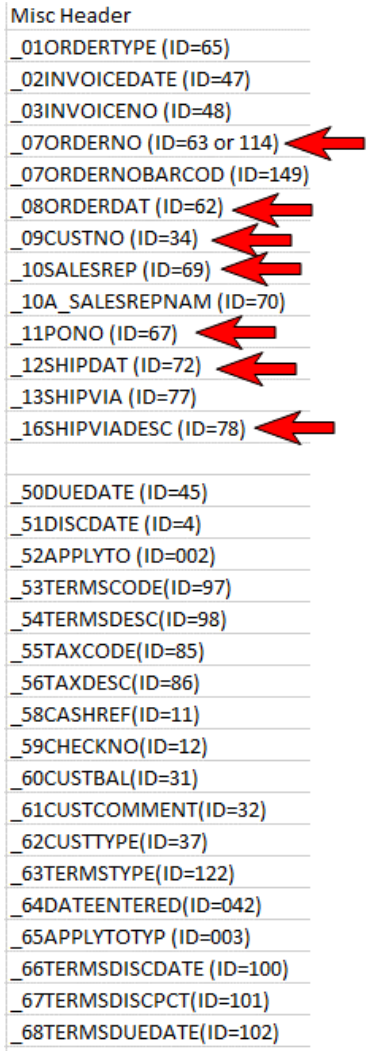
Order Number	Order Date	Customer Number	Sales Rep	Purchase Order Number	Ship Date	Ship Via

Table Row Data and Tags

<TR is the start of a table row. The following tags cause the PBS data to print on the form:

```
<TR ALIGN=C FACE=5 SIZE=11 BORDER=.5 COMPTEXT=ON FCOLOR=BLACK BGCOLOR=WHITE VALIGN=BOTTOM BORDERCOLOR=BLACK>
<TD ALIGN=C><&_07ORDERNO>
</TD>
<TD ALIGN=C><&_08ORDERDAT></TD>
<TD ALIGN=C><&_09CUSTNO></TD>
<TD ALIGN=C><&_10SALESREP></TD>
<TD ALIGN=C><&_11PONO></TD>
<TD ALIGN=C><&_12SHIPDAT></TD>
<TD ALIGN=C><&_16SHIPVIADESC></TD>
</TR>
```

Keep in mind that that field names above are found in the csv file. Here are the available miscellaneous header fields. The fields that are used for our example are indicated with a red arrow:



The <TD tag indicates table data. The & symbol indicates that field where the PBS data is coming from. For example: @_07ORDERNO means that the order number is used from PBS. The </TR> is the end of a table row. The ALIGN=C means that the data prints in the center of the cell.

The table header tags are combined with the table row tags to look like this:

1017	**07/09/19**	**5**	**H**	**PO 5327899I72-ZZ2**	**07/09/19**	**File Management**

PBS Field Setup

A PBS format is required. These are the fields in PBS O/E format:

```
063    20      6    Order number                                ZZZZZZ
062            19    Order date                                  07/11/19
034            35    Cust number                                 Len:  12
069            54    Sales rep                                   Len:   3
067            64    PO number                                   Len:  30
072            98    Ship date                                   07/11/19
078           114    Ship-via description                        Len:  15
```

Note that the PBS O/E format does not include any field labels as the frw file has these as tags. The placement of the fields in the PBS format does NOT have to be exact. The frw provides the placement of the data. To prevent confusion, we recommend that you put the PBS format fields in the same order as how they are defined in the frw.

Important tip: If data is not printing, it could be that the field is not defined in the frw. It could also mean that the field is not defined in the PBS format. Check both places. When working with lines, it could mean that the field is in the wrong column of the csv file.

Miscellaneous Header PDF Result

The frw header, table and data tags, along with the PBS format are generated into a PDF like this:

Order Number	Order Date	Customer Number	Sales Rep	Purchase Order Number	Ship Date	Ship Via
1017	07/09/19	5	H	PO 5327899I72-ZZ2	07/09/19	File Management

Body Tags Example

The body table contains the line information to be printed on the PDF form. Here is an example:

```
<BODY>
<TABLE CELLPADDING=6 BORDER=2 WIDTH=080 STRIPE=427,WHITE STRIPEX=0,100>
<TH COLSPAN=6 ALIGN=J FACE=2 SIZE=8 FCOLOR=black BGCOLOR=441 3D VALIGN=TOP BORDERCOLOR=277>
<TD ALIGN=R>Quantity Ordered<BR>Quantity Shipped</TD>
<TD ALIGN=R>Unit</TD>
<TD ALIGN=R>Item Number<BR>Quantity Back Ordered</TD>
<TD ALIGN=L>Item Description</TD>
<TD ALIGN=R>Price Unit<BR>Item Discount</TD>
<TD ALIGN=R>Unit Price<BR>Extended Price</TD>
</TH>

<DATASET ID=dtl>
<TR COLSPAN=6 BORDER=.1 FACE=2 SIZE=9 FCOLOR=BLACK VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R VALIGN=Top><&_01CELLBDYCOL1></TD>
<TD ALIGN=R VALIGN=Top><&_02CELLBDYCOL2></TD>
<TD ALIGN=R VALIGN=Top><&_03CELLBDYCOL3></TD>
<TD ALIGN=L VALIGN=Top><&_04CELLBDYCOL4></TD>
<TD ALIGN=R VALIGN=Top><&_05CELLBDYCOL5></TD>
<TD FACE=5 ALIGN=R VALIGN=Top><&_06CELLBDYCOL6></TD>
</TR>
</DATASET>
</TABLE>
```

The above body sections has the header and rows for the lines. This table has stripes of alternating white and light green. The CELLBDYCOL designates the columns where the data is pulled from PBS. For O/E these are the available fields for each column as entered in the OEDFTCSV.csv (default O/E csv file).

H	I	J	K	L	M
Cell1 Body Column 1	Cell2 Body Column 2	Cell3 Body Column 3	Cell4 Body Column 4	Cell5 Body Column 5	Cell6 Body Column 6
034|L|Lot quantity	014|L|Item alt unit 1	016|L|Item category	999|L|Literal for body text	004|L|Commission method	013|L|Extended price
041|L|Qty ordered	015|L|Item alt unit 2	018|L|Item number	006|L|Description 1	005|L|Commission percent	003|L|Commission amount
042|L|Qty ordered/stk	025|L|Item stocking unit	026|L|Item sub-category	007|L|Description 2	010|L|Discount amount	059|L|Unit price
043|L|Qty ret to inv	035|L|Misc item flag	028|L|Item vendor item no	008|L|Description 3	011|L|Discount percent	012|L|Extended cost
044|L|Qty ret to inv/stk	036|L|Order unit	029|L|Sequence number	009|L|Description 4	017|L|Item commission code	019|L|Item price 1
045|L|Qty to ship	037|L|Out of stock flag	030|L|Location code	031|L|Lot number	024|L|Item /Svc pricing unit	020|L|Item price 2
046|L|Qty to ship/stk	057|L|Tracking method	032|L|Lot number literal	048|L|Serial number	033|L|Lot no. reference	021|L|Item price 3
070|L|Qty filled	066|L|Text line flag	039|L|Qty backord	095|L|Warehouse name	038|L|Pricing unit	022|L|Item price 4
	068|L|Tracked flag	040|L|Qty backord/stk	097|L|Payment type desc	050|L|Serial no. reference	023|L|Item price 5
	069|L|Line item type	049|L|Serial no. literal	099|L|Payment check/CC #	052|L|Taxable flag 1	061|L|Warranty date 1
	073|L|Item type	051|L|Ship date	100|L|Payment auth code	053|L|Taxable flag 2	062|L|Warranty days 1
	074|L|Item status	060|L|Warehouse (item)	101|L|Payment CC exp date	054|L|Taxable flag 3	063|L|Warranty date 2
	090|L|Item weight unit	071|L|Warranty item no.	102|L|Payment date	055|L|Taxable flag 4	065|L|Net extended price
	091|L|Item width unit	075|L|Service vendor	103|L|Payment trx id	056|L|Taxable flag 5	064|L|Warranty days 2
	092|L|Item height unit	076|L|Date created	078|L|Drawing rev. number	058|L|Unit cost	072|L|Item discount price
	093|L|Item depth unit	077|L|Drawing number	079|L|Drawing rev. date		086|L|Item weight
		094|L|Job cost category	084|L|User date-1		087|L|Item height
		096|L|Payment code	085|L|User date-2		088|L|Item width
		105|L|Item UPC barcode	080|L|User quantity-1		089|L|Item depth
		106|L|Item number barcode	081|L|User quantity-2		098|L|Payment amount
			082|L|User description-1		104|L|Extended item weight
			083|L|User description-2		

As you can see above, many fields are available to be printed. Only the line fields that are assigned in the PBS format will print.

This is the O/E line item field setup for our example. Only these fields will print on the form:

```
L-Items041     1      6    Qty ordered                    ZZZZZZZ9.9999-
       025           24    Item stocking unit             Len:   4
       018           34    Item/Svc number                Len:  15
       006           60    Description 1                  Len:  25
       024           97    Item/Svc prcng unit            Len:   4
       059          115    Unit price                     ZZZZZZ9.99-
       045     2      6    Qty to ship                    ZZZZZZZ9.9999-
       039           34    Qty backord                    ZZZZZZZ9.99999-
       007           60    Description 2                  Len:  25
```

```
011          97    Discount percent                    Z9.99-
065         116    Net extended price                  ZZZZZZZZ9.99-
049     3    45    Serial no. literal                  "Serial number: "
048          60    Serial number                       Len:  65
```

This is the generated PDF body output:

Quantity Ordered Quantity Shipped	Unit	Item Number Quantity Back Ordered	Item Description	Price Unit Item Discount	Unit Price Extended Price
1 1	EACH	ACA-WPUPE 0	ACA Passport Update Prog. End User - Win OS	EACH 0.00	**240.00** **240.00**
1 1	EACH	ACA-UPUPE 0	ACA Passport Update Prog. End User - Linux/Unix OS	EACH 0.00	**100.00** **100.00**

Customizing the CSV file

Normally you would not alter a csv file that Passport provides. If you need to customize a csv file it is highly recommended that you make a copy of the file first. Then name the csv file to match your frw file name. The PBS program will automatically use a csv file named the same as an frw file. For example, if the frw file is called MYOE.frw, name the csv file MYOE.csv. The MYOE.frw must be assigned to the PBS format and the program will also use the changes in your csv file.

Why would you customize a csv file? The line fields can be moved from one column to another. All the line fields are in Body Cells in the csv. They start at column I and go to column M.

Here is an example for O/E. Let's say you want to move the Unit price from Column M to Column L. Unit price prints in Column 6 on the form, but you want it to print in column 5. Here it is before the move:

L	M
Cell5 Body Column 5	Cell6 Body Column 6
004|L|Commission method	013|L|Extended price
005|L|Commission percent	003|L|Commission amount
010|L|Discount amount	059|L|Unit price
011|L|Discount percent	012|L|Extended cost
017|L|Item commission code	019|L|Item price 1
024|L|Item /Svc pricing unit	020|L|Item price 2
033|L|Lot no. reference	021|L|Item price 3
038|L|Pricing unit	022|L|Item price 4
050|L|Serial no. reference	023|L|Item price 5
052|L|Taxable flag 1	061|L|Warranty date 1
053|L|Taxable flag 2	062|L|Warranty days 1
054|L|Taxable flag 3	063|L|Warranty date 2
055|L|Taxable flag 4	065|L|Net extended price
056|L|Taxable flag 5	064|L|Warranty days 2
058|L|Unit cost	072|L|Item discount price
102|L|Payment date	086|L|Item weight
	087|L|Item height
	088|L|Item width
	089|L|Item depth
	098|L|Payment amount
	104|L|Extended item weight

Cut the *059|L|Unit price* field and paste at the bottom of column 5. Also remove the space in column 6 where the Unit price was. This is the result:

L	M
Cell5 Body Column 5	Cell6 Body Column 6
004|L|Commission method	013|L|Extended price
005|L|Commission percent	003|L|Commission amount
010|L|Discount amount	012|L|Extended cost
011|L|Discount percent	019|L|Item price 1
017|L|Item commission code	020|L|Item price 2
024|L|Item /Svc pricing unit	021|L|Item price 3
033|L|Lot no. reference	022|L|Item price 4
038|L|Pricing unit	023|L|Item price 5
050|L|Serial no. reference	061|L|Warranty date 1
052|L|Taxable flag 1	062|L|Warranty days 1
053|L|Taxable flag 2	063|L|Warranty date 2
054|L|Taxable flag 3	065|L|Net extended price
055|L|Taxable flag 4	064|L|Warranty days 2
056|L|Taxable flag 5	072|L|Item discount price
058|L|Unit cost	086|L|Item weight
102|L|Payment date	087|L|Item height
059|L|Unit price	088|L|Item width
	089|L|Item depth
	098|L|Payment amount
	104|L|Extended item weight

Now, the Unit price will print in Column 5 of your format.

Totals and Comments Sections

In the frw, the totals and comments are two separate tables. There can even be two sections of comments.

Totals

This is a totals table example:

```
<TABLE CELLPADDING=2 BORDER=.1 X=45 X2=80 WIDTH=35>
<DATASET ID=ttl>
<TR ALIGN=R NOBREAK BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=441 FCOLOR=BLACK BORDERCOLOR=541>Sales amount<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_26SALESAMOUNT></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=WHITE  FCOLOR=BLACK BORDERCOLOR=541>Miscellaneous charges<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_27MISCCHRGES></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=441 FCOLOR=BLACK BORDERCOLOR=541>Freight<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_28FRGHTCHRGES></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=WHITE  FCOLOR=BLACK BORDERCOLOR=541>Sales tax<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_29SALESTAX></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=12 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=441 FCOLOR=BLACK BORDERCOLOR=541>Total<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=317 FCOLOR=BLACK BORDERCOLOR=BLACK><&_30TOTAL></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R  BORDER=.1 VALIGN=bottom BGCOLOR=WHITE  FCOLOR=BLACK BORDERCOLOR=541>Payment received<BR VALUE=0></TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_31PYMTREC></TD>
</TR>
<TR ALIGN=R BORDER=.1 FACE=5 SIZE=10 FCOLOR=BLACK BGCOLOR=WHITE VALIGN=bottom BORDERCOLOR=BLACK>
<TD ALIGN=R BORDER=.1 VALIGN=bottom BGCOLOR=441 FCOLOR=BLACK BORDERCOLOR=541>Balance due</TD>
<TD ALIGN=R VALIGN=bottom BGCOLOR=WHITE FCOLOR=BLACK BORDERCOLOR=BLACK><&_32BALDUE><BR VALUE=0></TD>
</TR>
<BR>
</DATASET>
</TABLE>
```

There are three lines for each total. The first line is overall formatting. The second is the field label and specific field label text formatting. The third is the amount and formatting of the amount text.

The totals and comments are part of the same totals section in the PBS format: Here is an example:

```
Ttls   013    1     1   Comment line 1                                  Len:  30
       068         116   Sale amount                                     ZZZZZZZZ9.99-
       014    2     1   Comment line 2                                  Len:  30
       056         117   Misc amount                                     ZZZZZZZ9.99-
       015    3     1   Comment line 3                                  Len:  30
       046         118   Freight amount                                  ZZZZZZ9.99-
       016    4     1   Comment line 4                                  Len:  30
       079         117   Tax total amount                                ZZZZZZZ9.99-
       017    5     1   Comment line 5                                  Len:  30
       059         116   Order net total amt                             ZZZZZZZZ9.99-
       009    6   116   Cash amount rcvd                                ZZZZZZZZ9.99-
       004    7   116   Balance due                                     ZZZZZZZZ9.99-
```

Based on the settings above and PBS format, the totals are generated in a pdf like this:

Sales amount	1816.50
Miscellaneous charges	15.00
Freight	0.00
Sales tax	0.00
Total	**1831.50**
Payment received	0.00
Balance due	1831.50

Note that the total has a larger font face and the background color (BGCOLOR) is 317.

Comments

In this frw only one comment table is used:

```
<TABLE NOBREAK BORDER=.2 3D WIDTH=80>
<TH ALIGN=L FACE=5 SIZE=8 FCOLOR=Black BGCOLOR=441 3D VALIGN=MIDDLE BORDERCOLOR=277>
<TD>Comments</TD>
<!TD>Comments 2</TD>
</TH>
<DATASET ID=cmt>
<TR FACE=2 SIZE=9 FCOLOR=BLACK VALIGN=bottom>
<TD ALIGN=L VALIGN=Top WIDTH=55><&_24COMMENT1></TD>
<!TD ALIGN=L VALIGN=Top WIDTH=80><&_25COMMENT2></TD>
</TR>
</DATASET>
</TABLE>
<FONT COLOR=BLACK>
```

Footer

A footer is optional. A footer prints at the bottom of every page and can be freeform text, an email address, a web site, page number and more. Here is an example:

```
<FOOTER MARGIN=5>
<TEXT>
<ALIGN VALUE=C><FONT SIZE=10>
Click <A HREF="http://pass-port.com">http://pass-port.com</A> to visit our site.
Click <A HREF="mailto:psi@pass-port.com">psi@pass-port.com</A> to send us an email.
</TEXT>
</FOOTER>
```

When printed to a PDF file the email and address fields become links. This is how the footer looks after creating a PDF or printing:

Click http://pass-port.com to visit our site. Click psi@pass-port.com to send us an email.

Email addresses and web site addresses can also be included in the header. They cannot be included in the body, comments or totals sections.

Bar Codes

You may use a bar code font for the O/E order number or item number. Here is an example:

```
<TEXT X=59 Y=3 FACE=5 SIZE=14 FCOLOR=REFLEXBLUE BORDER=3 BGCOLOR=441 3D>
Packing List
<Y VALUE=0 ALIGN=R>
<!&_03INVOICENO>
</TEXT>
```

At this time, only font type of Code39 can be used.

```
<FONT COLOR=BLACK>
</TEXT>
<TEXT X=59 Y=8 ALIGN=L>
<BARCODE FACE="bar25" HEIGHT=30 VALUE="*<&_07ORDERNO>*" TYPE="Code39">
</TEXT>
```

In this case the order number is being bar coded. The words and bar code print like this:

Fonts (FACE)

All the PBS examples are set to one of the Helvetica font styles. These styles are tagged in the frw file as the FACE=(number). The available default FACE fonts and styles included with PDF Forms Designer are:

Number (FACE Value)	Name	Example
1	Courier	ABCDEFG abcdefg 12345
2	Helvetica	ABCDEFG abcdefg 12345
3	Times	ABCDEFG abcdefg 12345
4	Courier-Bold	**ABCDEFG abcdefg 12345**
5	Helvetica-Bold	**ABCDEFG abcdefg 12345**
6	Times-Bold	**ABCDEFG abcdefg 12345**
7	Courier-Italic	*ABCDEFG abcdefg 12345*
8	Helvetica-Italic	*ABCDEFG abcdefg 12345*
9	Times-Italic	*ABCDEFG abcdefg 12345*
10	Courier-Bold-Italic	***ABCDEFG abcdefg 12345***
11	Helvetica-Bold-Italic	***ABCDEFG abcdefg 12345***
12	Times-Bold-Italic	***ABCDEFG abcdefg 12345***
13	Symbol	ΑΒΧΔΕΦΓ αβχδεφγ 12345
14	ZapfDingbats	✡✢✣✤✥✦✧ ✺✹✸✷✶✵ ✎✐✓✓✗

You may put an ADDFONT section into the frw file. This section allows you to add TrueType, OpenType or Type1 fonts. You may not need to add any fonts as the default PDF Forms Designer fonts and font styles list above may be all you need.

Colors

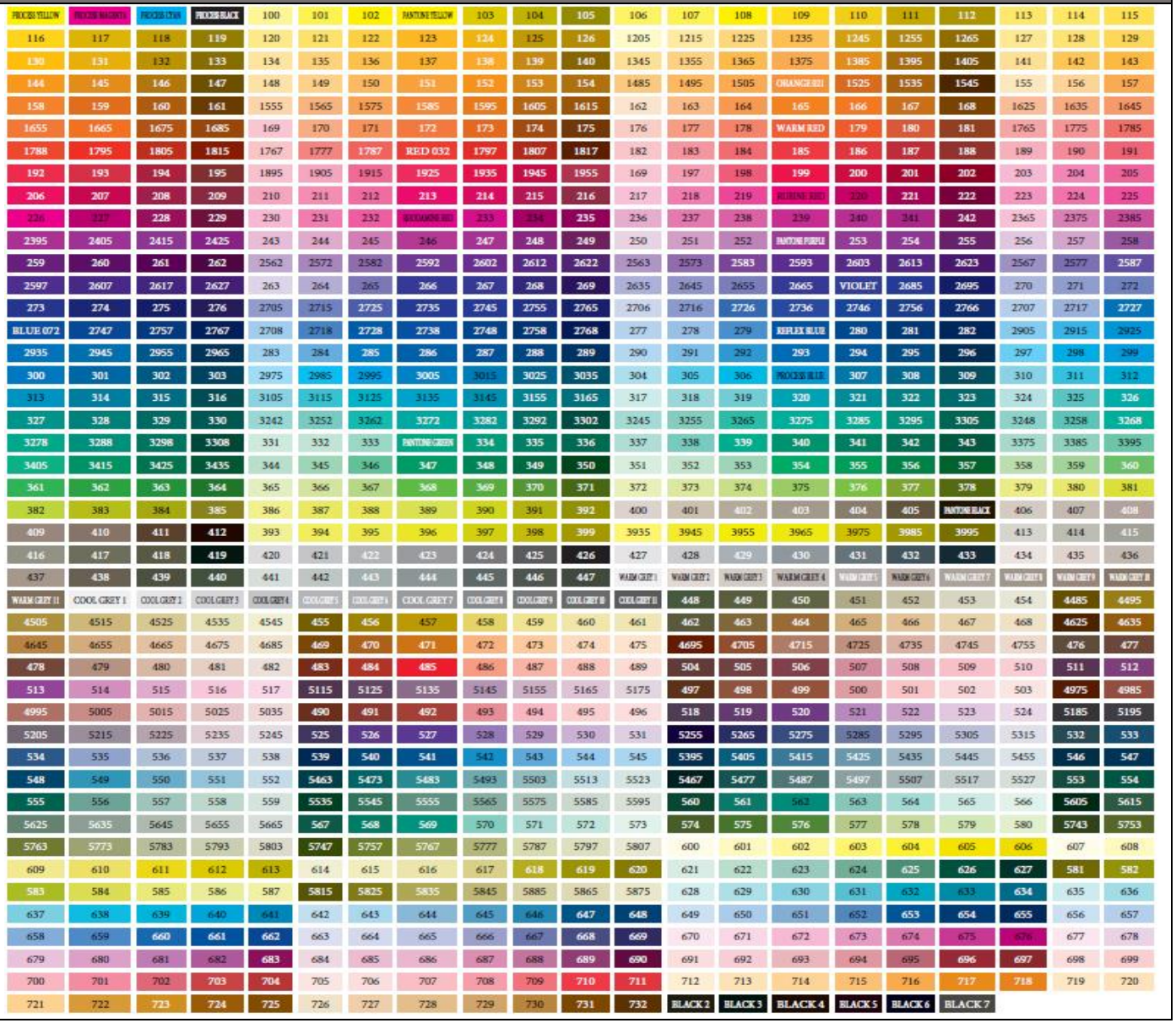
There are 16 RGB colors and many other pantone colors. These include:

RGB colors

Color	Name
	Black
	Silver
	Gray
	White
	Maroon
	Red
	Purple
	Fuchsia

Color	Name
	Green
	Lime
	Olive
	Yellow
	Navy
	Blue
	Teal
	Aqua

Pantone colors



For a clearer look at the pantone colors go to page 509 of the PDF Report Writer Documentation:

Designing the frw to Print on a Preprinted Form

In most cases, it is not recommended to use PDF Report Writer with PBS to print on a pre-printed form. If that is something you need contact Passport for custom help.

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