

Docs

This guide describes the QAD GTTE Docs document engine available in QAD GTTE. This module can be launched in the Web UI using the menu option DOCS, and enables you to generate, manage, and output company documents.

QAD GTTE Docs Overview Video

Learning Docs

This section describes how to use and navigate the QAD GTTE Docs UI.

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View Layout

The QAD GTTE Docs menu offers page views in which you can interact with the various components that make up the module.

A view typically provides you with data records and all the elements you need to interact with them. The layout can normally be separated into the following sections:

- Search Panel
- Browse Grid
- Toolbar

Typical View Layout

The screenshot shows a 'Documents' view with the following table data:

Name	Description	First Page Layout	Continuation Page Layout	Instruction Page
GTTE_Exports_PackingListLetter	Base Packing List - Letter Fo...	GTTE_Exports_PackingList_...	GTTE_Exports_PackingList_...	
GTTE_Exports_Standard Shipping Note	GTTE_Exports_Standard Sh...	GTTE_Exports_Standard Sh...		
GTTE_Exports_USMCA	USMCA Cert of Origin	GTTE_Exports_USMCA		
GTTE_Invoice_01_A4	Base Invoice (What Items)	GTTE_Invoice_01_A4	GTTE_Invoice_01_A4_#2	
GTTE_Invoice_01_A4_With_Charges	Base Invoice (What Items an...	GTTE_Invoice_01_A4	GTTE_Invoice_01_A4_#2	
GTTE_PackingList_01_A4	Base Packing List (What Co...	GTTE_PackingList_01_A4	GTTE_PackingList_01_A4_#2	
Imports_Invoice	GTTE Imports Invoice	Imports_Invoice_FirstPage	Imports-InvoiceContinuation...	
NEW-GTTE_Exports_CertificateOfOrigin_EC-A4	Base Document - Certificate ...	GTTE_Exports_CertOfOrigin...	GTTE_Exports_CertOfOrigin...	
NEW-GTTE_Exports_CMR commodity	Consignment Note	GTTE_Exports_CMR		
Shippers Export Declaration	Shippers Export Declaration	Shippers Export Declaration	0Test_ShippersExportDeclar...	
Shippers Letter Of Instruction	SLI	GTTE_Exports_Shipper Lett...	GTTE_Exports_Shipper Lett...	

Search Panel

The search panel allows you to search the records in the browse grid based on key attributes; for example, you can search for images based on the file name.

Search Panel

To search, complete one or more of the search fields and click the *Search* button or press *Enter*. Search results display in the grid. To clear the search field, click the *Clear* button.

Note Search fields accept wildcards.

Search and Clear Buttons



Browse Grid

Depending on the Docs menu option that you select in the menu panel, the grid contains either layout, image, document, data tag, level, node, node structure, source, or token records.

Browse Grid

Name ↑	Created Date	Created User	Last
Cert of Origin NAFTA CP	2020/11/25 16:36:33	QCONFIG	
Exports_Invoice_ContinuationPage	2020/04/01 12:46:27	QJSON	
Exports_Invoice_FirstPage	2020/04/01 12:46:14	QJSON	
Exports_PackingList_ContinuationPage	2020/04/01 12:46:19	QJSON	
Exports_PackingList_FirstPage	2020/04/01 12:46:25	QJSON	
GTTE_Bill of Lading	2020/12/01 15:12:52	QCONFIG	
GTTE_Exports_A.TR.1 Movement Certificate	2021/01/18 14:50:01	DFZ	
GTTE_Exports_Bill Of Lading	2021/02/26 11:02:55	DBU	
GTTE_Exports_BillOfLading-LETTER	2020/10/20 17:16:01	QCONFIG	
GTTE_Exports_CertOfOrigin_EC-A4	2020/11/12 18:21:20	QCONFIG	
GTTE_Exports_CertOfOrigin_US-LETTER	2020/11/12 19:44:13	QCONFIG	
GTTE_Exports_CMR	2021/01/13 12:27:18	DFZ	
GTTE_Exports_EAD-A4	2020/11/17 11:58:57	QCONFIG	
GTTE_Exports_EAD-A4-2	2020/10/15 09:11:35	PUE	
GTTE_Exports_EUR1	2020/11/13 15:09:25	QCONFIG	

The records in the grid depend on the search criteria specified in the search panel. Within the grid, some records include a link to relevant sub-options; for example, each record in the *Documents* grid includes a *Document Mapping* sub-option.

Document Mapping Sub-Option

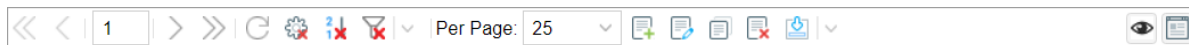
Name ↑	Description
0MappingUI	0MappingUI
Document Mapping	Summary Dat

Grid columns provide filter and sort options, which allow you to narrow down search results. You can also move columns around or hide columns in the grid.

Toolbar

The toolbar relates to the browse grid content. It displays the number of results pages returned in a search, and allows you to perform actions on one or more records.






Typical Toolbar Configuration



The table below explains the purpose of buttons and fields in a typical toolbar.

Toolbar Buttons

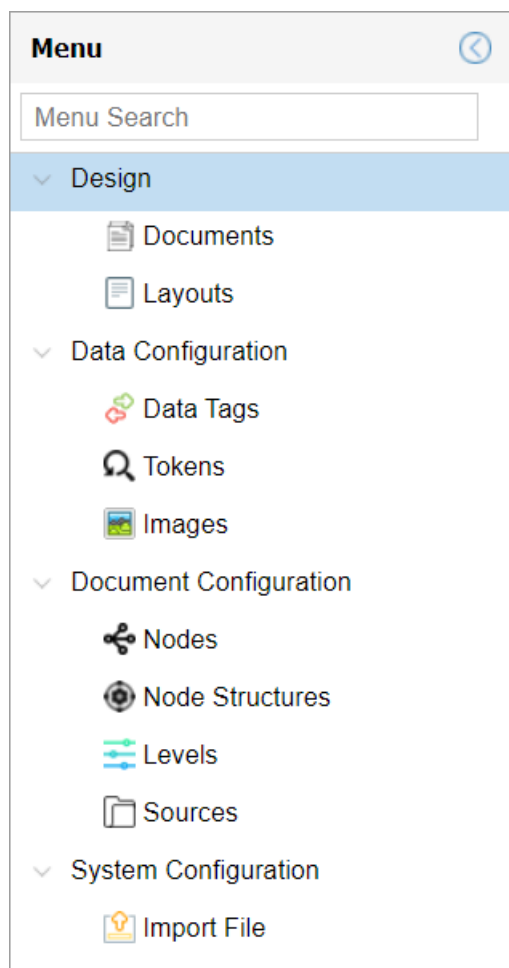
Button	Description
Per Page: 25	The Per Page field allows you to select the number of records that you want to appear on each page
	Use the arrows to navigate to the next or previous results page, or to the first or last page. Alternatively, insert a specific page number and press Enter.
	Use the Refresh button to update the Information Grid with any new information.
	The Restore Grid Settings button clears any filtering in the grid, and applies the default sort query to the grid.
	The Clear Sorting icon applies the default sort query to the grid. To view the applied sorting criteria, hold the cursor over the Clear Sort button.
<ul style="list-style-type: none"> • Clear Filter • Show Filter 	The Filter menu allows you to show the applied filters with the Show Filter option, and to clear any filtering in the grid with the Clear Filter option.
	When available, the Create Record button allows you to manually create records. Click the Create Record button to open a pop-up window that allows you to specify field values for the new record; mandatory fields display with an asterisk.
	When available, the Copy Record button allows you to manually copy records.

Button	Description
	<p>When available, the Update Record button allows you to edit existing records.</p>
	<p>When available, the Delete Record button allows you to delete records.</p>
 <ul style="list-style-type: none"> <li data-bbox="367 512 516 541">• Export All <li data-bbox="367 554 516 583">• Export Selected 	<p>The Export menu allows you to export all visible search results, or a subset of search results in the Information Grid, to a file.</p>
	<p>The function of this button depends on the page.</p> <p>When you click this button at the bottom right of the Layouts page, it downloads a PDF preview of the selected layout with placeholders inserted to represent shipment information—for example, {consignor-name} as a placeholder for the consignor name. Images inserted in ePage will also be visible in this preview.</p> <p>On the Images page, this button downloads an image preview of the selected image record.</p> <p>Clicking this button on the Documents page downloads a PDF preview of the selected document.</p>
	<p>Preview layout. Click this button on the Layouts page to view a PDF preview of a layout without placeholders.</p> <p>Note Layout images inserted in ePage are also visible in this preview; for example, company logos.</p>

Menu Panel

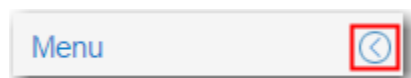
The panel on the left of the screen contains the Docs menu. It is divided into Design, Administration, and System Configuration sections.

Docs Menu Panel



You can hide the menu by clicking the left arrow at the top right of the panel.

Docs Menu Panel, Collapse Icon



Similarly, you can expand the menu panel by clicking the right arrow at the top right of the collapsed panel.

Docs Menu Panel, Expand Icon



Filtering Data

Many of the grid columns that are not included as criteria in the search panel include a filter option. To apply a column filter, hold the cursor over the column heading to display a chevron. Click the chevron, and then hold the cursor over the Filter option to set the filter criteria. If a column has a filter applied to it, the column title appears in bold, italicized text.

Column With Filter Applied

<i>Created User</i>	Last Modified Date	Last Modified User
DBU	07	RQF
DBU	12	RQF
DBU	18	RQF
DBU	23	RQF
DBU	27	RQF
DBU	03/12/2019 10:33	DBU

The filter criteria depend on the type of content in the column; for example, to filter numeric content you can specify a single value or a range of values.

Filtering Numeric Values

Decimal ...	Rounding ...	Replace Newline	Last Modifi
	<input type="checkbox"/>		21/02/2020
	<input type="checkbox"/>		12/02/2020
	<input type="checkbox"/>		17/02/2020
	<input type="checkbox"/>		17/02/2020
	<input type="checkbox"/>		17/02/2020
		> Enter Number... ▾	
		< Enter Number... ▾	
		= Enter Number... ▾	

Filtering Text Values

Name	Created User	Last Modified Date
InvoiceFirstPage		09/12/2019 16:33:27
InvoiceContinuationPage		09/12/2019 16:33:31
PackListFirstPage		09/12/2019 16:34:13
PackListContinuationPage		09/12/2019 16:33:12
PackingListFirstPage1		09/12/2019 16:34:25
PackListContinuationPage1		

Sort Ascending

Sort Descending

Columns >

Unlock

Lock

Filters >

Filtering Logical Values

Source
Yes
<input checked="" type="checkbox"/> No

Sort Ascending

Sort Descending

Columns >

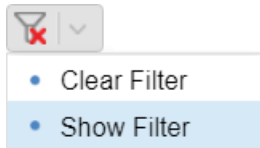
Unlock

Lock

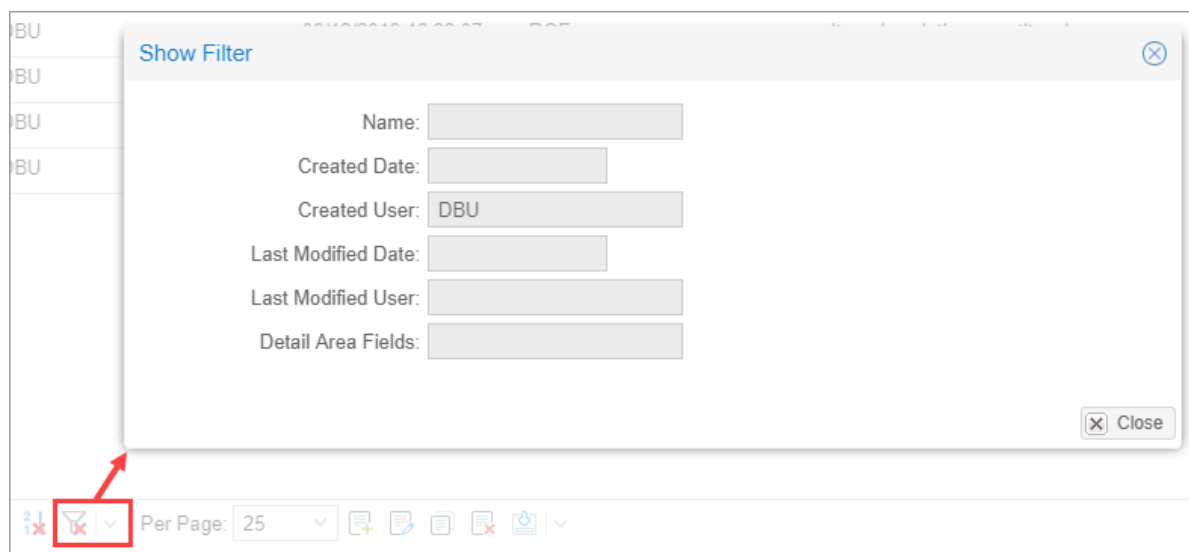
Filters >

You can filter on multiple columns. To view all of the current filters in a pop-up window, select the Show Filter option in the filter menu below the grid.

Filter Menu

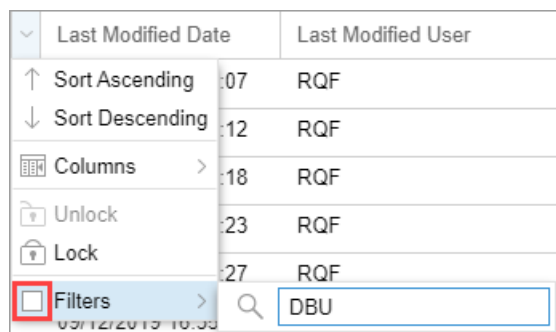


Show Filter Pop-Up Window



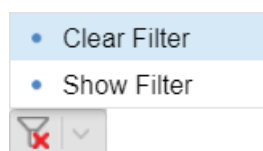
You can switch off a filter by clearing the filters option for the relevant column.

Clearing a Column Filter



To reset all of the filter criteria, click the Clear Filter option in the filter menu in the toolbar.

Clear Filter



Template Menu

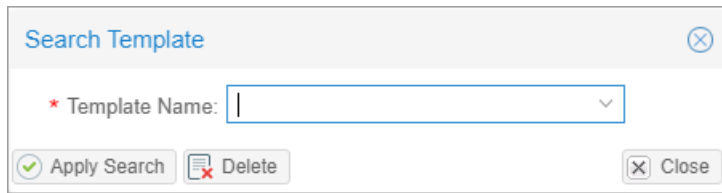
The template menu allows you to save a combination of search, sort, and filter queries configured in the browse grid and search panel. These queries determine the results that display in the browse grid.

Template Menu



To save a template, click the check button. To search for an existing template, click the magnifying glass button. This opens the Search Template pop-up.

Search Template Pop-Up Window

A screenshot of a 'Search Template' pop-up window. The window has a title bar with the text 'Search Template' and a close button (X) on the right. Below the title bar is a text input field with a red asterisk and the label 'Template Name:'. The input field is empty. At the bottom of the window, there are three buttons: 'Apply Search' with a green checkmark icon, 'Delete' with a red X icon, and 'Close' with a grey X icon.

Moving, Locking, and Hiding Columns

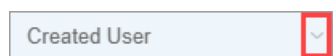
To move a grid column, click and drag the column to the new location, which is indicated by green arrows. Release the cursor to complete the column move.

Moving the Created User Column

Layouts					
Name: <input type="text"/>		Search By: Created User		<input type="text"/>	
<input type="button" value="Search"/>					
Name ↑	Created Date	Created User	Last Modified Date	↓	Last Modified User
PackingListFirstPage1	10/06/2019 14:02:52	DBU	09/12/2019 16:34:25	✓	Created User

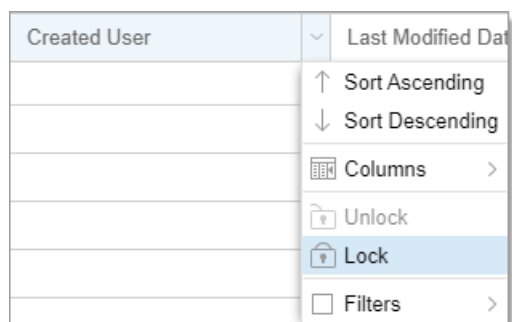
You can use the Lock option to fix one or more columns in position on the left of the grid, in an area that does not offer the horizontal scrolling capability. This facility is useful when you want certain columns to remain visible while scrolling horizontally through the other grid contents. To include a column in this locked area, hold the cursor over the column heading to display a chevron.

Click Chevron to Open Column Menu



Click the chevron, and then click Lock.

Lock Option



You can lock multiple columns; each newly locked column is appended to the locked area.

To remove a column from the locked area, hold the cursor over the column heading to display a chevron. Click the chevron, and then click Unlock; the column moves to the first column position to the right of the locked area.

Browse Grid with Locked Names and Created Date Columns

The screenshot shows a grid titled "Layouts" with a search bar and a "Search" button. The grid has five columns: Name, Created Date, Created User, Last Modified Date, and Last Modified User. A context menu is open over the "Created Date" column, showing options: Sort Ascending, Sort Descending, Columns, Unlock, Lock, and Filters. The "Columns" option is highlighted, and a sub-menu is visible showing a list of columns with checkboxes: Created Date (unchecked), Created User (checked), Detail Area Fields (checked), Last Modified Date (checked), Last Modified User (checked), and Name (checked).

Name	Created Date	Created User	Last Modified Date	Last Modified User
InvoiceFirstPage	14/05/2019 11:11:17	DBU	09/12/2019 16:33:27	RQF
InvoiceContinuationPage	14/05/2019 11:11:35	DBU	09/12/2019 16:33:31	RQF
PackListFirstPage	14/05/2019 11:12:00	DBU	09/12/2019 16:34:13	RQF
PackListContinuationPage	14/05/2019 11:12:18	DBU	09/12/2019 16:33:12	RQF
PackingListFirstPage1	10/06/2019 14:02:52	DBU	09/12/2019 16:34:25	RQF
PackListContinuationPage1	10/06/2019 14:03:38	DBU	09/12/2019 16:33:18	RQF
PackingListFirstPageImg	12/07/2019 14:06:00	DBU	09/12/2019 16:34:21	RQF
PackListContinuationPageImg	12/07/2019 14:06:13	DBU	09/12/2019 16:33:23	RQF
PackingListFirstPageImg1	12/07/2019 17:46:11	DBU	09/12/2019 16:34:17	RQF
Adec Commercial Invoice wit...	15/07/2019 14:41:34	RQF	09/12/2019 16:34:01	RQF
Adec Comm Invoice	15/07/2019 15:31:58	RQF	09/12/2019 16:34:05	RQF
Invoice with Image	22/07/2019 14:25:10	RQF	09/12/2019 16:33:51	RQF
Image Upload Example	23/07/2019 14:35:00	RQF	09/12/2019 16:33:56	RQF
InvoiceFirstPageSignature	23/09/2019 10:56:21	DBU	09/12/2019 16:35:05	RQF
InvoiceContinuationPageDocs	04/10/2019 13:07:55	DBU	09/12/2019 16:33:36	RQF

To hide a column, hold the cursor over any column heading to display a chevron. Click the chevron, and then hold the cursor over the Column option; the list of grid columns appears. To hide a column, clear the associated list entry.

Hiding the Created Date Column

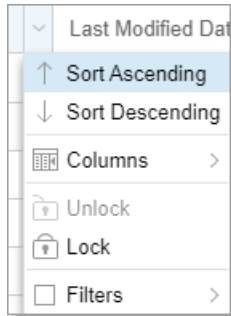
The screenshot shows the grid with the "Columns" menu open over the "Created Date" column. The "Created Date" option in the menu is highlighted with a red box, indicating it is being selected for hiding.

Name	Created User	Last Modified Date	Last Modified User
InvoiceFirstPage	DBU	19 16:33:27	RQF
InvoiceContinuationPage	DBU	19 16:33:31	RQF
PackListFirstPage	DBU		
PackListContinuationPage	DBU		
PackingListFirstPage1	DBU		
PackListContinuationPage1	DBU		
PackingListFirstPageImg	DBU	09/12/20	

Sorting Data

You can sort the data in the browse grid by clicking the column heading and selecting Sort Ascending or Sort Descending. You can also click a column heading to toggle between an ascending and descending sort based on that column. The column heading then shows an ascending or descending arrow as an indicator of the sort query.

Sort Ascending



You can sort the data within the context of an existing sorted result. The sort query is based on the last three columns used for sorting—earlier sort selections are discarded.

To apply the default sort criteria for a grid, click the Clear Sorting button.

Clear Sorting Button in Toolbar

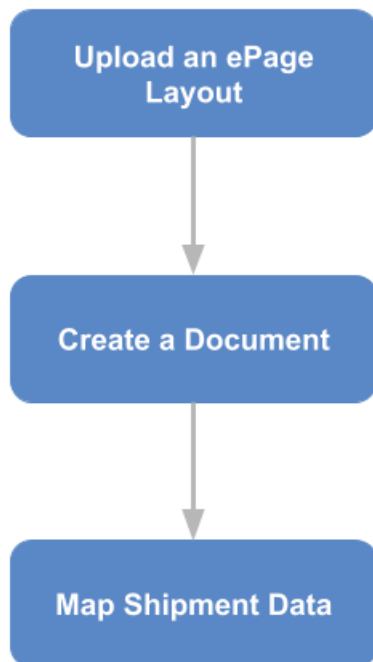


Design

This section describes the functionality available in the *Design* area of QAD GTTE Docs, and how to get started with your document.

- [Documents on page 1727](#)
- [Layouts on page 1767](#)

The image below illustrates the QAD GTTE Docs process flow for the creation of documents such as invoices and packing lists. Each step consists of sub-processes that are detailed in this help content.



Documents

On the *Documents* page, you can create, manage, and assign layouts to documents. As mentioned in the [Layouts on page 1767](#) section, a single document can contain up to two layouts; for example, a layout for the first page, and a continuation page layout.

The search panel at the top of the page enables you to filter the results in the grid.

Using the category filters above the grid, you can also filter the document records by a specific category; for example, *Base Export Documents* or *Base Import Documents*.


Documents Page

The screenshot shows the 'Documents' page interface. At the top, there is a search panel with a 'Name' input field, a 'Search By' dropdown menu set to 'Description', and 'Search' and 'Clear' buttons. Below the search panel are several category filters: 'Base Export Documents' (selected), 'Base Import Documents', 'North America', 'Europe', 'Workshop', 'Under Construction', 'Development', 'QA', 'Demo', and 'All'. The main content area is a table with the following columns: 'Name', 'Description', 'First Page Layout', 'Continuation Page Layout', and 'Instruction Page Layout'. The table contains six rows of document records:

Name	Description	First Page Layout	Continuation Page Layout	Instruction Page Layout
CertificateOfOrigin_EC-A4	Base Document - Certificate ...	GTTE_Exports_CertOfOrigin...	GTTE_Exports_CertOfOrigin...	
EAD-A4	Base Document - Export Acc...	GTTE_Exports_EAD-A4		
Invoice_01_A4	Base Invoice (What Items an...	GTTE_Invoice_01_A4	GTTE_Invoice_01_A4_#2	
Invoice_02_A4	Base Document - Invoice 2	GTTE_Invoice_02_A4		
PackingList_01_A4	Base Packing List (What Co...	GTTE_PackingList_01_A4	GTTE_PackingList_01_A4_#2	
PackingList_02_A4	Base Document - Packing Li...	GTTE_PackingList_02_A4		

At the bottom of the page, there is a toolbar with navigation arrows, a 'Per Page' dropdown set to 25, and a '1 - 7 of 7' indicator.

Creating a Document

To create a new document, click the Create  button located in the toolbar of the Documents screen, menu option DOCS. A pop-up window displays that contains both optional and mandatory fields. A red asterisk indicates a mandatory field.

Create Document Window

Create Document ⓘ ✕

Document Information

* Name:

* Description:

Categories:

Date Format:

Decimal Format: ⓘ

Layouts

* First Page Layout:

Continuation Page Layout:

Instruction Page Layout:

External Reference

External Type: ⓘ

External Name:

Document Structure

* Source:

* Level:

* Level Structure:

Sort By Hint: ⓘ

Other

Keep Detail Lines Together:

Preprinted Paper: ⓘ

In the Name and Description fields, enter a meaningful name and description for the document.

In the Categories dropdown list, choose the appropriate category or categories for the document. This is relevant to the category filters above the grid on the Documents page.

Using the Date Format field, specify the date format in which dates should be displayed on this document.

The Decimal Format field defines the decimal and thousands separator. You can choose a specific format from the dropdown list.

The rest of the fields in the Create Documents window are described below.

First Page Layout

Specify a layout for the first, or front, page of the document.

The top half of this layout usually specifies shipment information such as weights, dates, and seller, buyer, and manufacturer addresses. This layout only appears once in a document. Enter a layout title in the field provided, or select one from the dropdown list.

Continuation Page Layout

Specify a layout for the continuation pages of the document. This layout follows the first page, and typically has different layout fields to the First Page Layout, so that it can accommodate documents with multiple pages. This layout can be repeated multiple times, depending on the size of the shipment. Enter a layout title in the field provided, or select one from the dropdown list.

Note Only the first page of the document is printed if no continuation page has been specified. The First Page layout can only print once, while the Continuation Page layout can print multiple times.

Instruction Page Layout

Specify a layout for the instruction page of the document. This is an optional last page layout that typically includes information such as general terms and conditions, or instructions; for example, instructions for the exporter on how to correctly complete a certificate of origin document. An instruction page primarily consists of static text. However, you can add header information such as the shipment, order number, or page number.

Note A layout is considered an instruction page if there are no detail area layout fields. It is not possible to add detail area layout fields to a layout that is used as an instruction page layout in a document.

External Type

The External Reference fields are used when an external system requests Docs for document generation. Specify the document type in the system from which you are retrieving the information; for example, DT for transport documents in QAD GTTE. The External Type field must match the Document Type field in the corresponding record in the Documents screen, menu option DO.

Note The acceptable values for this field are restricted to values defined in the system value with the category DOCS and the key DOCUMENT TYPES.

Note If you are producing a document from QAD GTTE Workflow, you must specify a value for both the External Type and External Name fields. If the calling system does not have an External Type value for a document, leave this value blank.

External Name

This field helps to map a Docs document name to a document code in the QAD GTTE Transportation Execution (TE) Web UI. Users of the TE Web UI can then generate previews of documents that were created in the Docs module. The External Name field must match the Document field in the corresponding record in the Documents screen, menu option DO.

Note The external name must be unique. If the External Name field is left blank, it is assumed that the name in both systems is the same.

Source

Specify where you want to retrieve the data from for this document; GTTE Imports or GTTE Exports. This determines the data tags that are available in the [Document Mapping on page 1733](#) window.

Level

This field enables you to define the document level. Select a level option from the dropdown list to determine the data that is returned from the Web UI to populate the detail area. The options available in this dropdown list can vary depending on the value of the Source field. For more information on the purpose of each level, see the [Levels on page 1802](#) section.

Level Structure

You can specify the order and extent to which packs and pack items are displayed in the detail area. For example, if you select the structure Outer Pack > Inner Pack > Packed Items, the detail area outputs the outer pack information on the top level of the detail area, then an inner pack below it, followed by the items within the inner pack. Click the arrow to open a dropdown list of available level structure options.

Sort By Hint

In this field, you can specify how item line details are sorted using comma-separated hints. Use hints to sort common lists, such as charges, commodities, items, and pack headers.

In a hint, to specify how data in a document is sorted, use the following format:

```
[list-name1]=[field-name1[:DESC]], [field-name2[:DESC]], ...
```

[list-name2]=[field-name21[:DESC]], [field-name22[:DESC]], ...

For instance, to sort shipment item data by ascending purchase order (PO) number and—if there are multiple items with the same PO number—sort them by order number in descending order, use:


items=poNumber,orderNumber:DESC

Keep Detail Lines Together

Select this field if you want to group the detail lines of an item line together on the same page using a page break. If this field is left blank, a page break is not applied to the item details, and any overflowing detail lines are printed in the detail area on the following page. See the images below for examples of this feature when it is disabled and enabled on a pack list, respectively.


Keep Detail Lines Together Disabled, Overflowing Details Printed on Following Page

		ORING, PARKER NO 2-259 MATERIAL V0747-75			
Additional packing information					
				Name of signatory	
				Place and date of issue	
				Signature	

 Seller (name, address) General Business and Control Inc. 10000 Highway 101 Suite 100 Dallas TX 75243 Phone: 972-259-1234 Fax: 972-259-1235	Invoice number		Sheet no.		
	5541514				
	Invoice date (tax point)		Seller's reference		
	06/11/2018				
Buyer's reference		Other reference			
Consignee		Buyer (if not consignee)			
General Business and Control Inc.					
10000 Highway 101					
Suite 100					
Dallas TX 75243					
Phone: 972-259-1234					
Fax: 972-259-1235					
E-mail: info@generalbusiness.com					
Website: www.generalbusiness.com					
Item/ packages	Gross/ net/ cube	Description	Quantity	Other details	
		Item Code: 2-4-9163-259			

Keep Detail Lines Together Enabled, Page Break Applied and Detail Lines Are Grouped Together

Additional packing information		Name of signatory	
		Place and date of issue	
		Signature	


 Seller (name, address) QAD Management Group, Inc. 10000 Parkside Drive Dallas, TX 75244 USA	Invoice number	Sheet no.		
	5541514			
	Invoice date (tax point)	Seller's reference		
	06/11/2018			
	Buyer's reference	Other reference		
Consignee	Buyer (if not consignee)			
QAD Management Group 10000 Parkside Drive Dallas, TX 75244 USA				
Item/ packages	Gross/ net/ cube	Description	Quantity	Other details
		ORING, PARKER NO 2-259 MATERIAL V0747-75 Item Code; 2-4-9163-259		

Note To prevent the occurrence of a blank detail area, a page break is not applied in cases where the Keep Detail Lines Together feature is enabled and an item line has a large number of detail lines that do not fit in the detail area. For example, if an item has 30 detail lines and the detail area can only accommodate 15, the overflowing lines will be printed on the following page.

Preprinted Paper

Docs supports the output of data on preprinted paper. Preprinted paper already contains some static design elements such as lines, shading, images, and text. To exclude these elements from the Docs output, and only include the shipment data, you can enable the Preprinted Paper field.

To update an existing document, double-click a document in the list.

Alternatively, select a document record and click the Update  button in the toolbar.


After creating a document, you can then proceed to the [document mapping on page 1733](#) stage.

Document Mapping

After creating a document, the next step is the document mapping process. You can determine the information that is output on the final document by mapping data tags to layout fields.

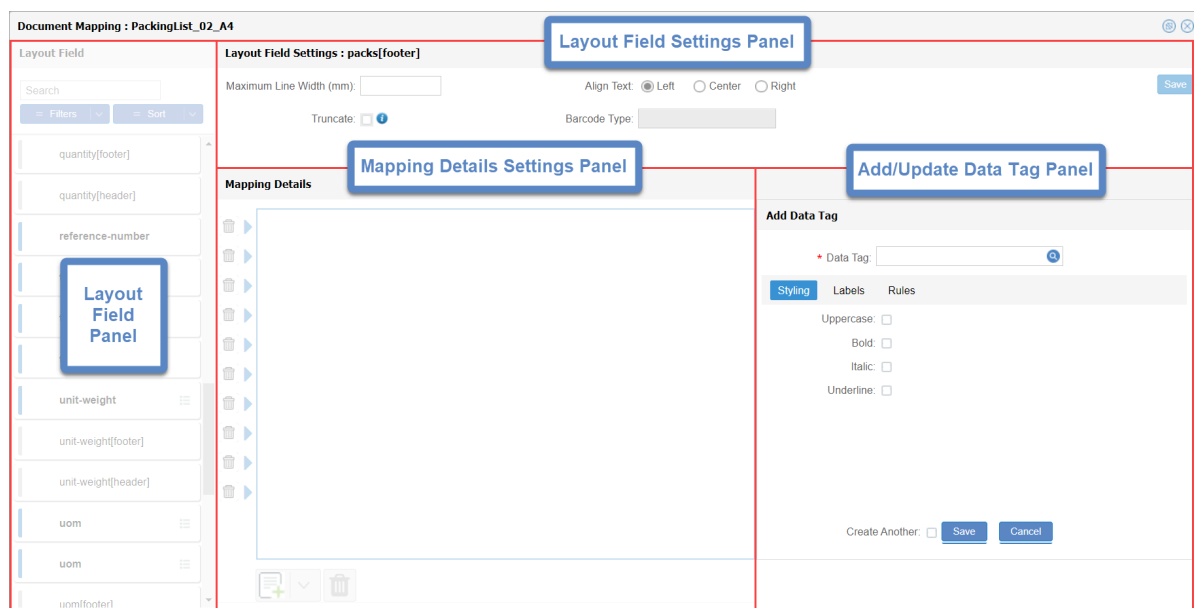
Data tags represent pieces of data on a shipment, such as destination and shipment items. They can also indicate more general information; for example, the current date and time.

To access the *Document Mapping* window, select a document on the

Documents page and click the *Document Mapping* sub-option  button on the document record.

The following sections describe the panels that comprise the *Document Mapping* window.

Document Mapping Window Panels



Layout Field Panel

The *Layout Field* panel on the left lists the layout fields in the database that are associated with the selected document source; *GTTE Imports* or *GTTE Exports*.

Document Mapping Window, Layout Field panel

Layout Field

Search

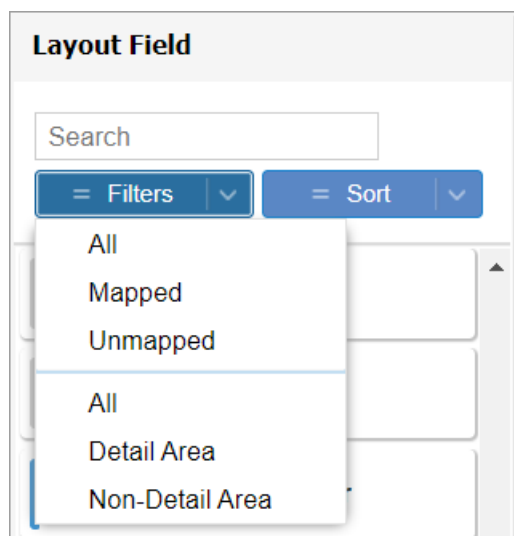
= Filters ▾ = Sort ▾

- buyer-adr
- buyer-name
- buyer-vatn
- buyers-reference
- cmdsc
- commodity
- consignee-adr
- consignee-name
- consignee-vatn
- consignor-adr

You can search for a specific layout field using the *Search* field provided.

The *Filters* field enables you to view only mapped or unmapped layout fields. You can also choose to display only detail area or non-detail area layout fields.

Filters Field, Document Mapping Window



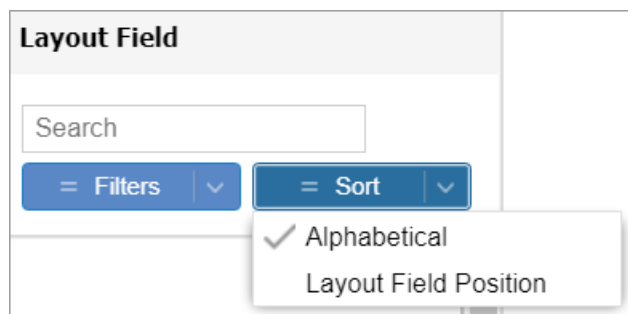
Note If a layout field is selected in the *Layout Field* list, it remains visible, regardless of the filtering criteria applied.

It is also possible to sort the layout fields in the list:

Alphabetical. Sort the layout field list in alphabetical order.

Layout Field Position. Sort the layout fields based on their position in the document. The first layout field in the list is the uppermost layout field on the first page of the document.

Sort Field, Document Mapping Window



The example below shows how the layout fields in the packing list provided display when sorted by position in the *Document Mapping* window.










Top of Sample Packing List Layout


Seller (name, address) {consignor-name} {consignor-adr1} {consignor-adr2} {consignor-adr3} {consignor-adr4}	{consignor-vatn}	Invoice number {invoice-number}	{page-number}
		Invoice date (tax point) {invoice-date}	Seller's reference {sellers-reference}
	Phone: {consignor-phone} Fax: {consignor-fax}	Buyer's reference {buyers-reference}	Other reference {other-reference}

Layout Fields Sorted by Layout Field Position

Layout Field

Search

-  **consignor-vatn**
-  **page-number**
-  **invoice-number**
-  **consignor-name**
-  **consignor-adr**
-  **invoice-date**
-  **sellers-reference**
- consignor-phone**
-  **logo**
-  **buyers-reference**

Layout fields in bold text with a  icon represent layout fields that already have data mapped to them; for example, the *invoice-number* layout field in the image above. Layout fields in regular text do not yet have any data tags mapped to them.

Layout Field Settings Panel

The Layout Field Settings panel is displayed at the top of the Document Mapping window when you select a layout field from the list. The options in this panel enable you to format and style how the data for a specific layout field is output onto the document.

Layout Field Settings : box10

Maximum Line Width (mm):

Align Text: Left Center Right

Print On: All Pages

Truncate:

Barcode Type:

The table below describes the fields that may be available to you, depending on the selected layout field.

Layout Field Settings Fields

Field	Description
Maximum Line Width	Set a maximum width in millimeters for the layout field. If no width is specified, then no maximum width is assumed and overflowing text does not wrap to the next line.
Truncate	If enabled, the data for the selected layout field is cropped when it reaches the maximum line width. If this field is left blank, the data is not cropped and wraps onto the next line.
Align Text	Align the text left, center, or right for this particular layout field. By default, this field is set to Left.
Barcode Type	Output layout field data as a barcode instead of text. The supported barcode types are: <ul style="list-style-type: none"> • Code 39 • Code 128 • PDF417 • QR Code For more information, see the Barcodes section below.
Indent Width	This option is available for layout fields that are located in the detail area. You can specify in millimeters how much of an indent is added to each level.

Field	Description
	<p>For example, if you specify an indent of 5mm, and the document has a level structure of Outer Packs > Inner Packs > Packed Items:</p> <ul style="list-style-type: none"> • The top level item is not indented. • The next level is indented by 5mm. • The level beneath it is indented by 10mm.
Print On	<p>This option is available for layout fields that are located in the non-detail area. It enables you to configure which pages mapped data tags are output to. You can set an image, barcode, or mapped data that is assigned to a layout field to display on one of the following options:</p> <ul style="list-style-type: none"> • All Pages prints the data on all pages in the document where the form placeholder exists. This value is the default value. • First Page prints the data only on the first page of the document. • Last Page prints the data only on the last page of the document. • First or Continuous Pages prints the data on the first page of a single-page document, or on the second and continuation pages of a multi-page document. <p>For example, to include a signature image on the final page of a document form, set Print On to Last Page for the signature image data tag.</p>

Barcodes

It is possible to output layout field data as a barcode instead of text using the Barcode Type field.

Barcode Type Field

Maximum Line Width (mm):

Align Text: Left Center Right Save

Truncate:

Barcode Type:

To do this, follow the steps in this section to map a data tag to a layout field. After you click Save:

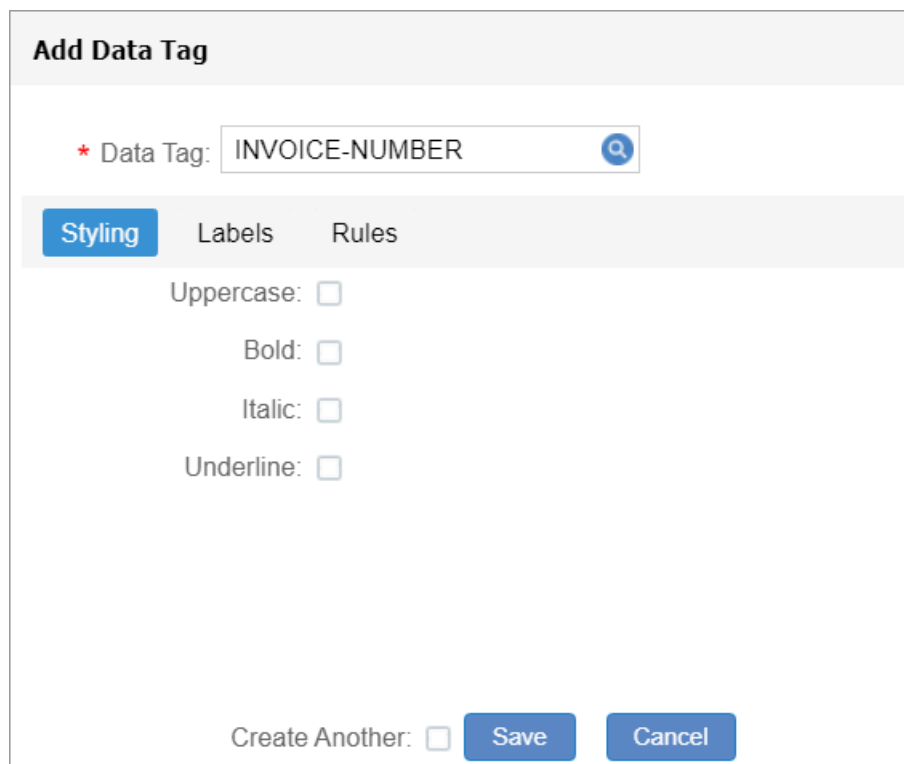
1. Click the Barcode Type field to open the dropdown menu.
2. Select a barcode type from the list. Here, you can also specify a barcode type with specific dimensions; for example, 20 millimeters.
3. Click Save.

This layout field is now output as a barcode or QR code on the document. When scanned, the code presents the user with shipping data, such as a tracking number.

Add Data Tag Panel

The Styling, Labels, and Rules tabs in the Add Data Tag panel enable you to format the look and behavior of data on a document.

Add Data Tag Panel

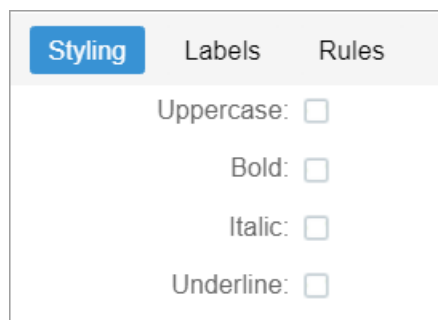


The screenshot shows the 'Add Data Tag' panel. At the top, there is a search bar with the text 'INVOICE-NUMBER' and a magnifying glass icon. Below this is a tabbed interface with three tabs: 'Styling' (which is highlighted in blue), 'Labels', and 'Rules'. Under the 'Styling' tab, there are four options, each with a checkbox: 'Uppercase: ', 'Bold: ', 'Italic: ', and 'Underline: '. At the bottom of the panel, there is a 'Create Another:

Styling Tab

Select the relevant fields in the Styling tab if you want to apply uppercase, bold, italic, or underline styling to the data tag.

Styling Tab



This is a close-up of the 'Styling' tab from the previous screenshot. It shows the four styling options with their respective checkboxes: 'Uppercase: ', 'Bold: ', 'Italic: ', and 'Underline: '. The 'Styling' tab label is also visible at the top left of the panel.

Labels Tab

Add a label before or after a data tag using the Label tab. A label displays on the same line as the piece of data, with a space separator between the two elements.

Use the Before field to specify text to display before the data tag. You can add a label after the data tag using the After field. The styling options inside both fields allow you to bold, italicize, or underline a label.

Note A label does not display if the data tag value is blank at the time of printing.

Labels Tab

Rules Tab

The Rules tab enables you to specify an alternative value or data tag to output by default based on certain conditions. You can specify multiple values to trigger a rule by adding the values in the If value is field.

Depending on the configuration of the primary data tag, you can set rules for scenarios where the value is blank, true, or false. For more information on configuring possible values for data tags, see [Possible Values on page 1782](#).

Rules Tab

To establish a rule that outputs static text if the data tag value is blank, true, or false:

1. In the If value is: field, select a condition: blank, true, or false. Enter text in the Use free text field; for example, NONE.
2. Click Save.

Output Static Text If Data Tag Value is Blank

The screenshot shows a configuration panel with three tabs: 'Styling', 'Labels', and 'Rules'. The 'Rules' tab is active. Below the tabs, there is a section for defining a rule. It includes a dropdown menu labeled 'If value is:' with 'blank' selected. Below that, there is a 'Use:' dropdown menu with 'NONE' selected, followed by an 'or:' label and an empty text input field.

To output the value of an alternate data tag if the value of the primary data tag is blank, true, or false:

1. In the If value is: field, select a condition: blank, true, or false.
2. Select a data tag using the Use lookup; for example, the Reference data tag.
3. Click Save.

Output Alternate Data Tag If Value of Primary Data Tag is Blank

The screenshot shows a configuration panel with three tabs: 'Styling', 'Labels', and 'Rules'. The 'Rules' tab is active. Below the tabs, there is a section for defining a rule. It includes a dropdown menu labeled 'If value is:' with 'blank' selected. Below that, there is an empty 'Use:' text input field, followed by an 'or:' label and a dropdown menu with 'REFERENCE' selected. A search icon is visible to the right of the 'REFERENCE' dropdown.

You can make layout fields act as check boxes depending on the value of the primary data tag. This is possible using the Otherwise Use fields.

The example below demonstrates how to output an 'X' in the layout field if the shipment is containerized. Otherwise, the value is blank.

1. With the CONTAINERISED data tag selected, choose true in the If value is: field.
2. In the Use: field on the left, type 'X'.
3. In the Otherwise Use: field on the left, select blank from the drop-down list.
4. Click Save.

Output an 'X' if Primary Data Tag Value is True

Add Data Tag

* Data Tag: Q

Styling
Labels
Rules

If value is: v

Use: or:

Otherwise Use: or:

Print Only Once

The Print Only Once field in the Add/Update Data Tag panel enables you to output the specified data tag for each child record only once; for example, output pack information for the first packed item only. This feature is available for detail area layout fields only.


Note In this case, if there are multiple packs, the data outputs multiple times; once for the first item in each pack.

Print Only Once Field

Update Data Tag

* Data Tag: Q

Print Only Once: i




The sample below shows a packing list with the Print Only Once field enabled on the pack-tracking-number data tag. The pack information is printed for the first packed item only.

Packing List Sample, Print Only Once Field Enabled


Item/ packages	Description	Quantity	Other details
Pack# 11746	Gross: 5.5 KG , Net: 0.5 KG , Volume 0.0 M3 BOOTS - SIZE 7 - BLACK Item#: A1000000 Country of origin: UNITED KINGDOM Buyers reference: BR1234567890 Hazardous information: CARTRIDGES FOR WEAPONS with bursting charge 1 , UN 0006	6 Pair	1 x BOX Tracking No: XYZ Container: CONTAINER-001 UPI: UPC Mark1: 123
	BOOTS - SIZE 9 - BLACK Item#: A1000002 Country of origin: CHINA Buyers reference: BR1234567890	20 Each	
Pack# 11747	Gross: 0.5 KG , Net: 0.0 KG , Volume 17,000.0 M3 CARTRIDGE, UNIVERSAL	10	1 x BOX Mark1:
Additional packing information			

Data Tag Lookup

The Data Tag lookup displays when you click the lookup  button in the Data Tag field. This window presents a list of data tags and several filtering options that enable you to locate a specific one.

Data Tag Lookup Button, Add Data Tag Panel

Add Data Tag

* Data Tag: 

Data Tag Lookup Window

Data Tag

Clear All

Data Tag
Name:
Description:

Entities

Charge Commodity Container
Declaration Item Lot
Package Party Shipment
Vessel Other
Sub-Entity

Business Types

Measure... Location Finance
Contact Quantity Event
Goods Reference Other

Core Types

Code Description Flag
Long Desc Value

Primitive Data Types

Date Decimal Integer

Name ↑	Description
account-detail	Account details The data provided is taken
activity	Activity The data provided is taken direct
actual-arrival-date	Actual arrival date The data provided is t
actual-arrival-time	Actual arrival time The data provided is t
actual-costs-complete	Actual costs complete The data provided
actual-departure-date	Actual departure date The data provided
actual-departure-time	Actual departure time The data provided
actual-letter-of-credit-number	Actual letter of credit number The data p
additional-reference	Additional reference The data provided is
adjustment-mode	Adjustment Mode The data provided is t
adjustment-round	Adjustment Round The data provided is
advance-payment-required	Advance payment required The data pro
advise-due-date-tlx	Advise Due date tlx The data provided is
advise-reason-telex	Advise reason telex The data provided is
advise-reason-telex2	Advise reason telex The data provided is
aes-itn	AES ITN The data provided is taken dire
aes message code	AES Message Code The data provided i

Per Page: 25

Use the Name and Description free-text fields if you want to search for a specific data tag by name or description.

Note These fields accept wildcards. For example, to view all data tag names that contain the word Location, enter the * wildcard character followed by Location in the Name field.

You can filter the list according to various types, including:

- Entity type
- Business type
- Core type
- Primitive data type
- Summary or non-summary data tags

Using the Database Storage filters, you can also search within database tables and columns.

Database Storage Filters, Data Tag Lookup Window

Database Storage

Table Column

Filtering settings are saved and automatically applied the next time you access the Data Tag lookup window.

Mapping Details Panel

The editor in the Mapping Details panel shows the data tags that are currently mapped to a layout field. You can modify, create, and delete new mapping details in this area.

Mapping Details Editor


Mapping Details

PACK ITEM

Packed Items Loose Items

- item-product
- item-product-code
- item-country-of-origin-long-desc
- item-po-number
- item-hazmat-description2
- item-hazmat-un-classification item-hazmat-class
- blank-line
-
-
-

+ [icon] [icon] [icon]

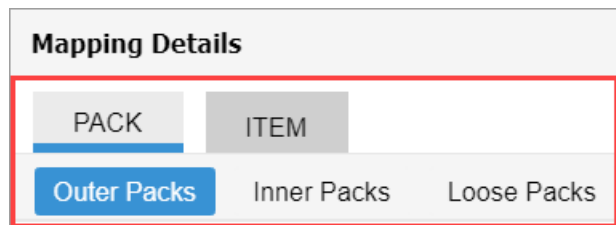
Using the Delete  buttons to the left of the editor, you can delete the mapped data across a single row in the layout field. When you delete a row, the row that was previously below it then moves upward to replace it.


If there are multiple data tags mapped to a layout field, the drag and drop functionality in the Mapping Details editor enables you to determine the order in which the data is output on the document. This is particularly useful for layout fields that are located within the detail area of a document, as you may need to rearrange the order of multiple data tags for various nodes.

If the selected layout field is located in the detail area of the document, tabs above the editor area indicate the node that you are currently editing, and the document's assigned level structure. For example, this area may show PACK and ITEM tabs.

These tabs may also have sub-tabs, such as Outer Packs and Inner Packs under the PACK tab, and Packed Items and Loose Items under the ITEM tab. For more information on levels and level structures, see [Levels on page 1802](#).

Mapping Details Tabs

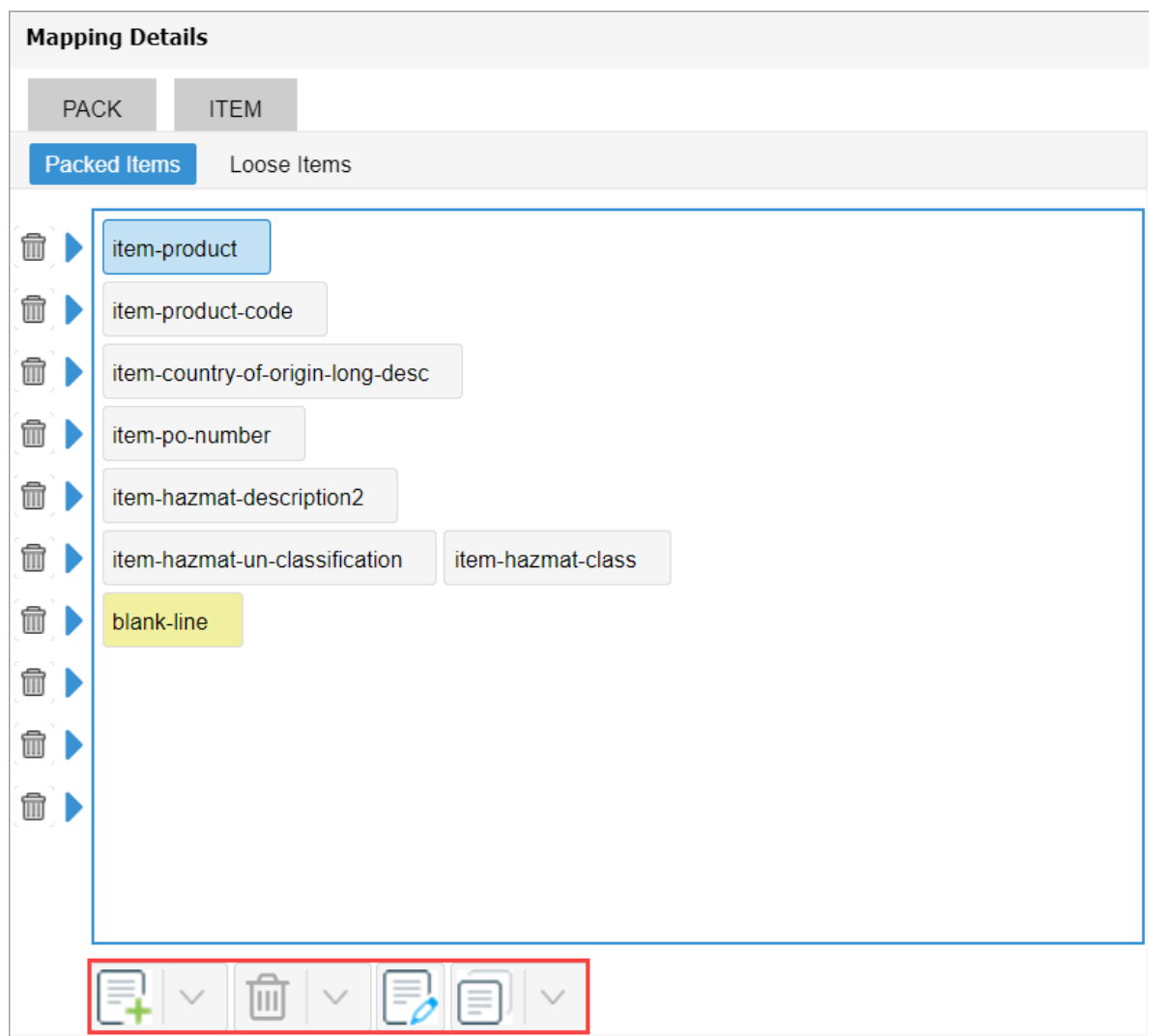


Click the Save  button at the bottom right of the editor to ensure that your changes are saved.

Mapping Details Panel Toolbar




The toolbar at the bottom of the Mapping Details panel enables you to add data tags or modify mappings.





Mapping Details Panel Toolbar



The purpose of each button is described in the table below.


Mapping Details Toolbar Options

Button	Description
	Add data tag. Click the down arrow  beside this button to open the data tag menu and select a specific type of data tag. The data tag menu options are detailed below this table.
	Select an element in the Mapping Details editor and click this button to update the mapping details. You can also double-click an element to update it.

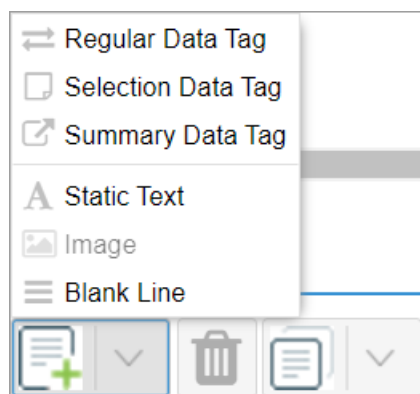
Button	Description
	<p>Delete. Select a data tag in the Mapping Details editor and click this button to delete it. Alternatively, click the down arrow beside this button to delete all mapping details.</p>
	<p>Copy mappings. This toolbar option is only available if:</p> <ul style="list-style-type: none"> • The layout field is located in the detail area. • The document level is set to <i>Pack</i>. • The document's level structure contains at least 2 sub-nodes that you can copy mappings to. For example, the structure below: <div data-bbox="472 663 971 926" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Mapping Details</p> <p>PACK ITEM</p> <p style="border: 2px solid red; padding: 2px;">Outer Packs Inner Packs Loose Packs</p> <p>▶ item-po-number</p> </div> <p>This option is useful if there is a lot of repetitive data and you want to copy the mapping details across multiple nodes.</p> <p>To copy mappings from the selected sub-node to another, click the Copy Mappings button. In the drop-down list that appears, select the sub-node that you want to copy to.</p> <div data-bbox="472 1169 899 1360" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">   <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> <p>Inner Packs</p> <p>Loose Packs</p> </div> </div>

Data Tag Menu

Several types of data tags are available for mapping. Click the down

arrow beside the Add  button to view them and select one from the list.

Data Tag Menu



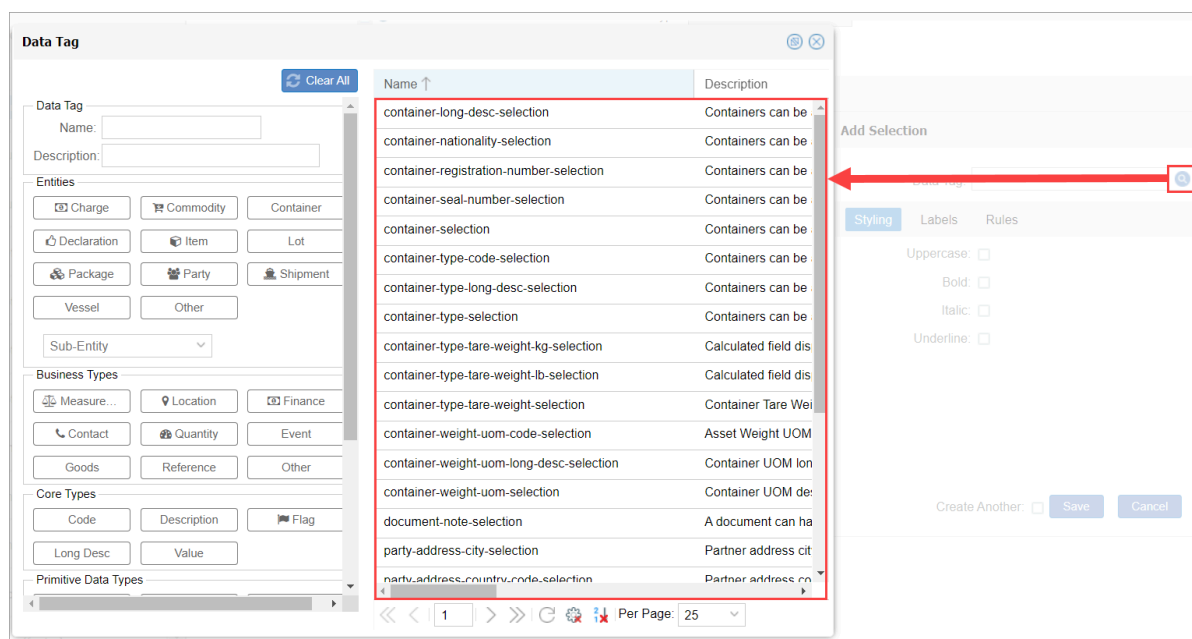
Regular Data Tag

This is a standard data tag and the most common type in the database.

Selection Data Tag

This type of data tag type is particularly useful if you need to map numerous transaction texts, notes, container, and/or seal numbers to a document. When you select this data tag and click the Data Tag lookup field in the Add Selection panel, the Data Tag lookup window displays.

Data Tag Lookup, Selection Data Tag




This window contains a filtered list of items that are declared as selection data tags, and groups together common elements like texts, notes, containers, and seal numbers on a shipment. Depending on the selected data tag, the Add Selection panel displays an additional field for you to further specify the output data:

- Text ID
- Note Index
- Container Index (1-20)
- Vessel Index
- Virtual Field
- Party Type

TEXT-SELECTION Data Tag, Specify Text ID


Add Selection


* Data Tag: 

* Text ID: 

CONTAINER-SEAL-NUMBER-SELECTION Data Tag, Specify Container Index

Add Selection

* Data Tag: 


* Container Index: 



Summary

For data tags that potentially have multiple values; for example, the country-of-origin data tag if an item on the shipment has more than one origin country.

Add Summary Data Tag

Add Summary

* Data Tag: 

Operation:  

Using the Operation field, you can choose an action that you want the system to perform when outputting a summary data tag. The options presented in the Operation drop-down list vary depending on the selected data tag.

For example, if the ITEM-GROSS-WEIGHT summary data tag is selected, you can choose to output the value in kilograms using the Total in Kg operation, or in pounds using the Total in Lb operation.

You can also use the Count operation to output a count of the number of returned records, excluding nulls and empty values.

For other summary data tags, you may have a Synopsis option in the Operation drop-down list. This enables access to the Rules tab functionality so that you can configure the output based on specific scenarios.

Summary Data Tag Operation Options

Add Summary

* Data Tag: ITEM-GROSS-WEIGHT

Operation: Count

Count

Total in Kg

Total in Lb

Styling

Upper Case

Bold:

Italic:

Underline:


Number Format: 0.00

Create Another: Save Cancel

For item lists, such as lists of PO numbers, invoice numbers, and order numbers, you may see list operations. There are two list operations:

- List. Shows the raw details in a list on the document, including blanks, nulls, and duplicates.
- List Distinct Sorted. Distinctly lists the details, excluding blanks, nulls, and duplicates.

List Distinct Sorted Operation

' and 'Underline: '. The background of the dialog is light gray."/>

Update Summary

* Data Tag: ITEM-PO-NUMBER

Operation: List Distinct Sorted

Styling

Count

List

List Distinct Sorted

Synopsis

Italic:


Underline:



To add a summary data tag:

1. Select Summary from the data tag drop-down menu.
2. Use the Data Tag lookup field in the Add Summary panel to specify the data tag that you want to output as an alternate value.
3. Use the Operation field drop-down list to specify the action that you want to be performed when this data tag is used on a document.
4. Apply any necessary styling in the Styling tab.
5. In the Rules tab, you can choose the values that you want to output in specific scenarios:

Add Summary Data Tag, Rules Tab

Add Summary

* Data Tag: 

Operation:  

Styling Rules

If values are different



Use:

If values are the same

Use Value

Replace With

If values are blank

Use:  or 

Create Another: Save Cancel

- If values are different - Use: Use the free text field to specify what should be printed in this layout field if the values are different; for example, various countries of origin.
- If values are the same - Use Value: For a list containing values that are all the same. Select this option if you want to output this value.
- If values are the same - Replace With: For a list containing values that are all the same. Select this option if you want to replace the value with a piece of text, and specify the text in the free text field.
- If values are blank - Use: You can specify what the Docs system should output in cases where the primary data tag value is blank. Insert a piece of static text in this field. Alternatively, click the down arrow and select blank to output no alternate value.
- If values are blank - or: Output the value of an alternate data tag in cases where the primary data tag value is blank.

Note You must set up rules for a summary data tag. Otherwise, the data tag value will be blank when the document is printed.

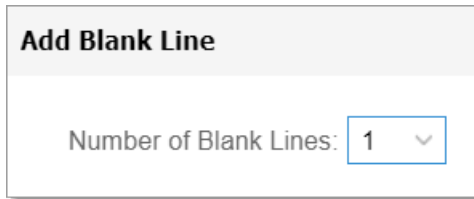
Note For more information on the summary functionality and how a summary—or list—data tag is created, see the [List Data Tag on page 1782](#) section.

Blank Line

You can add up to ten blank lines above, below, or between data tags. This can be useful if the detail area looks cluttered and you want to create more space around the text.

Click to add a blank line, and specify the desired number of blank lines in the Add Blank Line panel that appears to the right.

Add Blank Line



The image shows a dialog box titled "Add Blank Line". Inside the dialog, there is a label "Number of Blank Lines:" followed by a dropdown menu. The dropdown menu is currently set to the number "1".

Sample Document With Blank Lines

Description	
Pallet : 2.00 KG / 0.00 M3	
BOX 1.00 LB / 161.49 M3	
BOOTS - SIZE 7 - BLACK	
Country of origin: TAIWAN, PROVINC	←
BOOTS - SIZE 8 - BLACK	
Country of origin: CHINA	←
BOOTS - SIZE 9 - BLACK	
Country of origin: CHINA	←

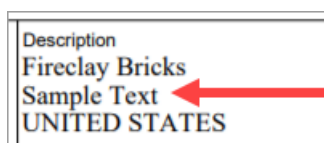
Static Text

Add static text of up to 2000 characters to a layout field. You can apply bold, italic, or underline styling to it.

Add Static Text



Document Sample With Static Text

**Image**

Select this option to open the Add Image panel on the right, where you can use the lookup to choose an image from the database. For more information on uploading images to the database, see [Images on page 1796](#).

Note For alignment purposes, an image must be a standalone data element in a layout field. Therefore, this option is only available if no other mapping data exists for a layout field.

The two image type options—Regular and Evaluated—are described below.

Add Image Panel

Regular

You can output a specific image in all scenarios using this image type, regardless of any criteria. To do this, select Regular for the Image Type field. Then use the Image lookup to choose an image from the database.

Evaluated

Alternatively, you can use the fields provided to output an image based on shipment data.

The example below describes how a user populates the fields to output the signature of the shipping officer for a shipment. This is achieved by specifying an image prefix and the shipping-officer-code data tag value.

Note The signature is stored as an image in the QAD GTTE database.

1. Select Evaluated for the Image Type field. Additional fields display below the Image Type field: Prefix and Data Tag.
2. In the Prefix field, specify the prefix of the image name to be output. The example below shows a list of images in the Images grid, each representing a shipping officer's signature. The format of these image names is [prefix-shipping officer code]. Therefore, signature is the prefix entered in the Prefix free text field.

Shipping Officer Signatures, Image Name Prefixes Highlighted

Images	
Name:	<input type="text"/>
Name ↑	
signature-420301	
signature-371928	
signature-224125	
signature-288531	

Specify Image Prefix

Add Image	
Image Type:	<input type="radio"/> Regular <input checked="" type="radio"/> Evaluated i
* Image:	<input type="text" value="signature"/> - <input type="text" value="Data Tag"/> Q

- Use the Data Tag lookup field to select the shipping officer code data tag; in this case, it is shipping-officer-code.



Specify Data Tag

Add Image	
Image Type:	<input type="radio"/> Regular <input checked="" type="radio"/> Evaluated i
* Image:	<input type="text" value="signature"/> - <input type="text" value="SHIPPING-OFFICER-COD"/> Q

The value of this data tag—the shipping officer’s code—determines which image with the signature prefix will be selected.

When the document is generated, the system appends the data tag value—for example, 420301—to the signature prefix with a dash between the two elements. This results in signature-420301. Therefore, the system outputs the image named signature-420301—the shipping officer’s signature—in the selected layout field.

Sample Shipping Officer Signature

Name of signatory John Smith
Place and date of issue CHICAGO / 10/07/2020
Signature  


Styling

The Width and Height fields in the Styling tab enable you to specify the dimensions of the image in millimeters. Use the Horizontal Offset and Vertical Offset fields to specify, in millimeters, how far up, down, left, or right of its default position that you want to output the image in the layout field.

Note An image may appear blurred or stretched in the document preview if the specified width and height are bigger or do not match the aspect ratio of the original image.

Previewing a Document

You can use existing shipment data to preview a document. This provides you with a realistic example of what the document looks like when the layout fields are populated with information.

Select a record on the *Documents* page and then click the *Preview*  button in the toolbar. The *Preview Document* window displays. In this window, you are prompted to input the details of a shipment for testing purposes. You can use any shipment that exists in the database.

Preview Document Window

Preview Document ✕


Name:

* Client:

* Shipper Code:

* Reference No.:

* Despatch Number:

Simulate Print: 

|
 |
 |

The *Simulate Print* field enables you to preview the document as though it is being physically printed. It only applies to documents that have the *Preprinted Paper* field enabled, which omits static elements such as lines, shading, images, and text. The *Simulate Print* field, if enabled, overrides the *Preprinted Paper* field. For more information on the *Preprinted Paper* field, see the [Creating a Document on page 1727](#) section.

Using the *Download JSON* button in the *Preview Document* window, you can download the shipment's JSON file.

Similarly, you can download the shipment's XML FO file by clicking the *Download XML FO* button. The information in this document can be useful for troubleshooting.

Click the *View Document* button to preview the document in a new tab.


Example: Mapping a Data Tag with a Label and Rule Applied

The following example illustrates how a user maps the data tag representing the consignor's name to the *consignor-name* layout field on a document. In addition, a label is applied, as well as a rule that specifies an alternate data tag value to use in cases where the primary data tag value is unavailable.

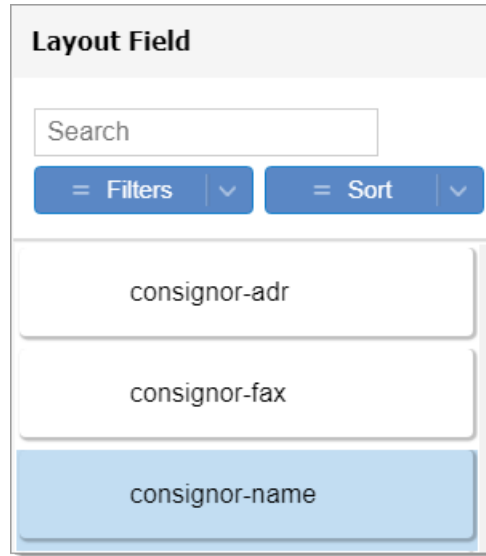
Note To assist you during the mapping process, you may find it useful to have a preview of the layout — with placeholders included — open in another browser tab.


consignor-name Layout Field in Layout Preview

Seller (name, address, VAT reg. no.)	{consignor-vatn}
{consignor-name}	
{consignor-adr1}	
{consignor-adr2}	
{consignor-adr3}	Phone: {consignor-phno}
{consignor-adr4}	Fax: {consignor-fax}

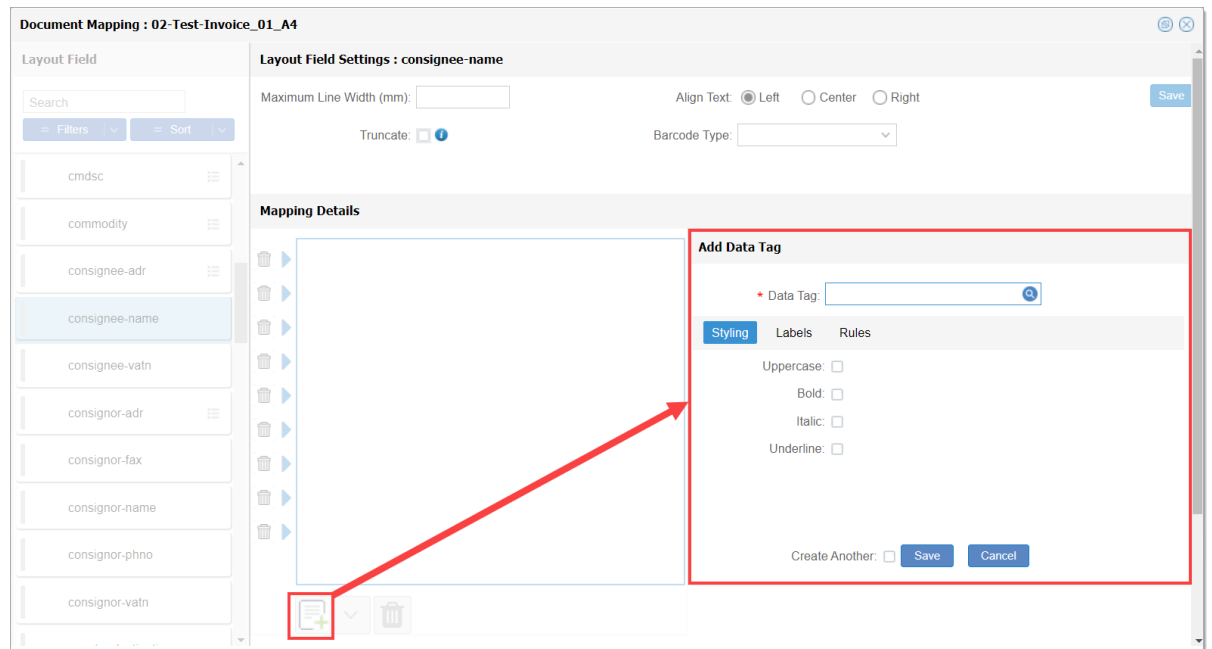
1. In the *Documents* grid, click the *Document Mapping* sub-option button  on the record that you want to configure.
2. In the *Document Mapping* window, select the *consignor-name* layout field in the *Layout Field* list panel on the left.


Select Layout Field



3. Click the *Add Data Tag*  button under the *Mapping Details* panel. This opens the *Add Data Tag* panel.

Add Data Tag Panel



4. Click the lookup  icon in the *Data Tag* field. The *Data Tag* lookup window displays.
5. Select the *consignor-name* data tag from the list.

Consignor-name in the Data Tag Lookup

Name ↑	Description
commodity-volume-uom-code	The commodity volume UOM c
commodity-volume-uom-long-desc	The commodity volume UOM l
commodity-weight-uom	The commodity weight UOM de
commodity-weight-uom-code	The commodity weight UOM cc
commodity-weight-uom-long-desc	The commodity weight UOM lo
company-number-code	Company number The data pr
compliance-status	Compliance status The data pr
consignee-excise-number	Consignee excise number The
consignee-name	Name of the "Consignee" for th
consignor-excise-number	Consignor excise number The
consignor-name	Name of the "Consignor" for th
consignor-tan	TAN number of the "Consignor"
consignors-bank-code	Consignors bank The data prov
consolidate-for-freight	Consolidate for Freight The dat
consolidation	Consolidation The data provide
consolidator-location-code	Consolidator Location The date

6. Enable the relevant fields in the *Styling* tab if you want to apply uppercase, bold, italic, or underline styling.

Styling Tab

, Bold: , Italic: , and Underline: .

7. In the *Labels* tab, enter '*Consignor:*' in the *Before:* free text field. Then highlight the text and apply bold styling.

Add Label with Bold Styling

Styling **Labels** Rules

Formatting, spacing and line breaks will be applied to labels

Before: **B I U** i

Consignor:

After: **B I U** i

8. In the *Rules* tab, you can specify an alternate value to use if the value for the primary data tag - *consignor-name* - is unavailable. In the *If value is:* field, select *blank*.
9. For the purposes of this example, *customer-name* is the alternate data tag to be used if *consignor-name* is blank. In the data tag lookup for the *Use* field, select *customer-name*.

Specify Alternate Data Tag, Rules Tab

Add Data Tag

* Data Tag: CONSIGNOR-NAME 🔍

Styling Labels **Rules**

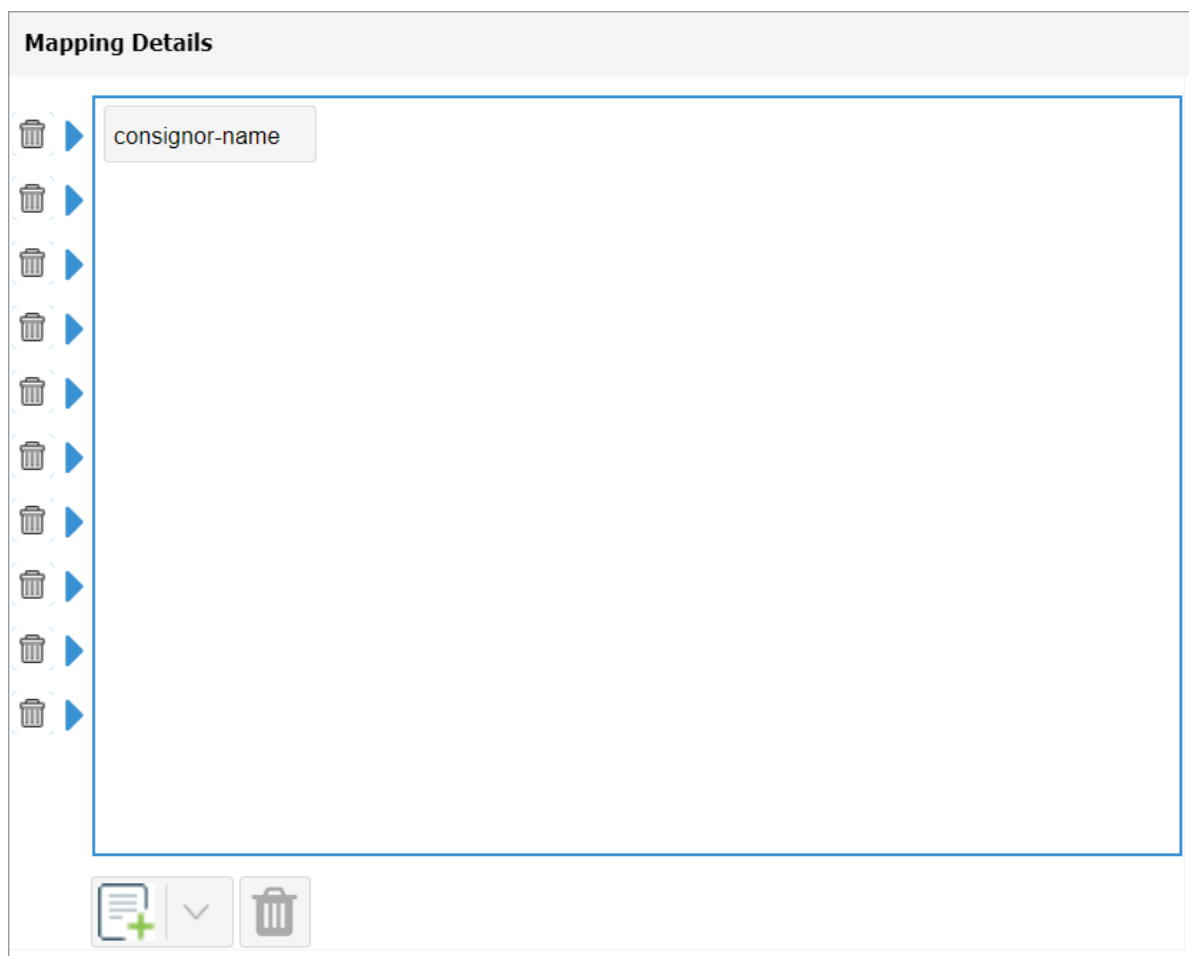
If value is: blank ▼

Use: or: CUSTOMER-NAME 🔍

Otherwise Use: ▼ or: 🔍

10. Click **Save**. The saved mapping now appears in the *Mapping Details* editor on the left.

Mapping Saved, Mapping Details Panel



When a preview of this example document is generated, the layout field appears as follows:

Preview of Mapped Data

Seller (name, address, VAT reg. no.)	
Consignor: QAD Precision	
	Phone:
	Fax:

Example: Outputting Charge Summary Information

Charge summary groups—also known as summary buckets—are used to summarize costs. For more information on configuring charge summary groups and setting them up for documents, see [Charge Summary Groups on page 1568](#) in the Transportation Execution section.

It is possible to output this summary information on a document in QAD GTTE Docs using the typical [Document Mapping on page 1733](#) process. The steps below describe the process with regard to a bill of lading document.






Note Charge summary information data tags are indicated by the prefix *summary-charge*; for example, *summary-charge-summary-bucket*.



1. In the *Documents* grid, click the *Document Mapping* sub-option button



on the record that you want to configure.

Access the Document Mapping Window

Documents		
Name: <input type="text"/>		Search By: <input type="text" value="Description"/>
Name ↑		Description
	GTTE_Exports_Bill Of Lading	Base Document - Bill Of Ladi...
	Document Mapping	Base Document - Export Acc...
	GTTE_PackingList_01_A4	Base Packing List (What Co...
	GTTE_PackingList_01_A4_Index	Base Packing List (What Co...
	GTTE_PackingList_01_A4_upd	Base Packing List (What Co...

2. In the *Document Mapping* window, select the layout field that you want to map the charge summary information to from the *Layout Field* list panel on the left. For the purposes of this example, the layout field is *charge-desc*.
3. Click the *Add Data Tag*  button under the *Mapping Details* panel. This opens the *Add Data Tag* panel.
4. Click the lookup  icon in the *Data Tag* field. The *Data Tag* lookup window displays.
5. Select a charge summary information data tag, indicated by the prefix *summary-charge*. For the purposes of this example, the data tag *summary-charge-summary-bucket* is selected.

Summary-charge-summary-bucket Data Tag, Data Tag Lookup

Name ↑	Description
summary-charge-basic-charge	Summary charge basic charge
summary-charge-basic-selling-charge	Summary charge basic selling charge
summary-charge-currency	Summary charge currency
summary-charge-summary-bucket	Summary charge summary bucket
summary-charge-summary-bucket-code	Summary charge summary bucket code
summary-charge-total-charge	Summary charge total charge
summary-charge-total-selling-charge	Summary charge total selling charge
summary-commodity	Summary commodity description
summary-commodity-code	Summary commodity code
summary-commodity-long-desc	Summary commodity long description
summary-commodity-pack-detail	Summary commodity pack detail

6. Click Save.

Note You can map only one summary data tag to a layout field. Therefore, in the case that you want to output the amount, currency, and charge description summaries, three layout fields are required.

The table below contains sample layout fields for the summary charge information on a bill of lading document. The column to the right lists the corresponding data tags that are mapped to each one.

Summary Charge Mappings

Layout Field	Data Tag
charge-value	SUMMARY-CHARGE-TOTAL-CHARGE
charge-currency	SUMMARY-CHARGE-CURRENCY
charge-desc	SUMMARY-CHARGE-SUMMARY-BUCKET

The image below is a preview of the summary charge area on a sample bill of lading, with placeholders included.

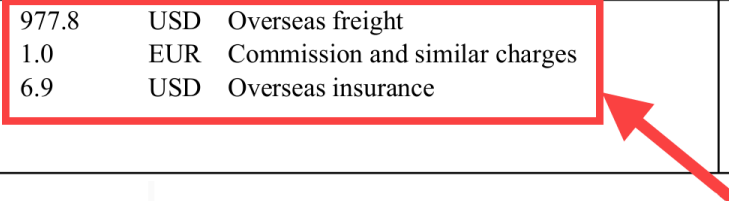
Summary Charge Layout Fields with Placeholders, Sample Bill of Lading

{charge-value1}	{charge-currency1}	{charge-desc1}
{charge-value2}	{charge-currency2}	{charge-desc2}
{charge-value3}	{charge-currency3}	{charge-desc3}
{charge-value4}	{charge-currency4}	{charge-desc4}
{charge-value5}	{charge-currency5}	{charge-desc5}

The resulting output with shipment data is displayed below.

Sample Bill of Lading Output with Shipment Data

977.8	USD	Overseas freight
1.0	EUR	Commission and similar charges
6.9	USD	Overseas insurance



Layouts

The **Layouts** screen displays all of the layouts in the system. A layout is the arrangement of visual elements — the lines, boxes, and label text — on a single page. Depending on the type of document you want to create, it can contain one or multiple layouts.

Layouts						Select a Search Template
Name	Search By	Created User		Search	Clear	
Name ↑	Created Date	Created User	Last Modified Date	Last Modified User	Detail Area Fields	External Name ↑
GTTE_CustomInvoice_01_A4	09/10/2023 13:06:38	QCONFIG	09/10/2023 13:06:38	QCONFIG	item.qty,number,description,po,htsus,price,ext-value	
GTTE_CustomInvoice_01_A4_#2	09/10/2023 13:06:40	QCONFIG	09/10/2023 13:06:40	QCONFIG	item.qty,number,description,po,htsus,price,ext-value	
OMG 021016	12/09/2024 17:00:28	QCONFIG	12/09/2024 17:00:28	QCONFIG	L,cpr,pr,detail-area,qtyo,qtyb,oum,sum,pum,qtyp,po,so,seq	021016
OMG 021017	12/09/2024 17:01:24	QCONFIG	12/09/2024 17:01:24	QCONFIG	L,cpr,pr,detail-area,qtyo,qtyb,oum,sum,pum,qtyp,po,so,seq	021017
Sample-CertificateOfOrigin_01#1-A4	08/09/2022 18:04:20	QCONFIG	08/09/2022 18:04:20	QCONFIG	quantity,description,packs	
Sample-CertificateOfOrigin_01#1-LETTER	08/09/2022 18:04:21	QCONFIG	08/09/2022 18:04:21	QCONFIG	description,df,gkilt,quantity	
Sample-Invoice_01#1-A4	08/09/2022 18:04:24	QCONFIG	08/09/2022 18:04:24	QCONFIG	item,description,quantity,price,amount	
Sample-Invoice_01#2-A4	08/09/2022 18:04:26	QCONFIG	08/09/2022 18:04:26	QCONFIG	quantity,price,amount,item,description	
Sample-Invoice_02#1-A4	08/09/2022 18:04:28	QCONFIG	08/09/2022 18:04:28	QCONFIG	tariff-code,co-code,product-code,quantity,uom,weight,unit-price,total...	
Sample-Invoice_03#1-LETTER	08/09/2022 18:04:29	QCONFIG	08/09/2022 18:04:29	QCONFIG	item,description,quantity,price,amount	
Sample-Invoice_03#2-LETTER	08/09/2022 18:04:30	QCONFIG	08/09/2022 18:04:30	QCONFIG	quantity,price,amount,item,description	
Sample-PackingList_01#1-A4	08/09/2022 18:04:31	QCONFIG	08/09/2022 18:04:31	QCONFIG	item,other-details,quantity,description	

Document designers who create layouts using ePage can import layouts to QAD GTTE Docs in MPD format, where they then have the ability to update, delete, copy, or search for layout records. This is described in more detail in the [Creating a Layout on page 1770](#) section.

Documents, like invoices and packing lists, typically contains two layouts:

First page. The first page of the document. The top half of the layout usually specifies shipment information such as weights, dates, and seller, buyer, and manufacturer addresses. This layout only appears once in a document.

Continuation page. This layout follows the first page, and normally lists the packs and items on the shipment. This layout can be repeated multiple times, depending on the size of the shipment, and typically displays a summarized version of the header data; for example, seller and buyer information.

Some documents may have an additional third layout:

Instruction page. This is an optional last page layout that typically includes information such as general terms and conditions, or instructions; for example, instructions for the exporter on how to correctly complete a certificate of origin document. An instruction page primarily consists of static text. However, header information such as the shipment, order number, or page number, can be added.

Note A layout is considered an instruction page if there are no detail area layout fields. It is not possible to add detail area layout fields to a layout that is used as an instruction page layout in a document.

Sample of a Packing List's First Page Layout

INVOICE					
Seller (name, address, VAT reg. no.) {consignor-name} {consignor-adr1} {consignor-adr2} {consignor-adr3} {consignor-adr4}		{consignor-vatn} Phone: {consignor-phno} Fax: {consignor-fax}		Invoice number {invoice-number}	{page-number}
				Invoice date (tax point) {invoice-date}	Seller's reference {sellers-reference}
				Buyer's reference {buyers-reference}	Other reference {other-reference}
Consignee {consignee-name} {consignee-adr1} {consignee-adr2} {consignee-adr3} {consignee-adr4}		{consignee-vatn}		Buyer (if not consignee) {buyer-name} {buyer-vatn} {buyer-adr1} {buyer-adr2} {buyer-adr3} {buyer-adr4}	
{box10[1]} {box10[2]} {box10[3]} {box10[4]} {box10[5]} {box10[6]} {box10[7]}				{box11[1]} {box11[2]}	
				Country of origin of goods {country-of-origin}	Country of destination {country-destination}
				Terms of delivery and payment {delivery-terms} {pay-description1} {pay-description2} {pay-description3} {pay-description4} {pay-description5}	
Vessel/ flight no. {vessel-name}	Port/ airport of loading {port-of-loading}				
Port/ airport of discharge {place-of-discharge}	Place of delivery {place-of-delivery}				
Shipping marks; container number {marks[1]} {marks[2]} {marks[3]} {marks[4]} {marks[5]} {marks[6]} {marks[7]} {marks[8]} {marks[9]}	No. and kind of packages {packs1} {packs2} {packs3} {packs4} {packs5} {packs6} {packs7} {packs8} {packs9}	Commodity Code {commodity1} {commodity2} {commodity3} {commodity4} {commodity5} {commodity6} {commodity7} {commodity8} {commodity9}	Description of goods {cmdsc1} {cmdsc2} {cmdsc3} {cmdsc4} {cmdsc5} {cmdsc6} {cmdsc7} {cmdsc8} {cmdsc9}	Total gross wt (kg) {total-gwtt,,r}	Total cube (m3) {total-cubt,,r}
				Total net wt (kg) {total-nwtt,,r}	
Item / Packages	Description	Quantity	Unit price	Amount	
{item001}	{description001}	{quantity001,,r}	{price001,,r}	{amount001,,r}	
{item002}	{description002}	{quantity002,,r}	{price002,,r}	{amount002,,r}	
{item003}	{description003}	{quantity003,,r}	{price003,,r}	{amount003,,r}	
{item004}	{description004}	{quantity004,,r}	{price004,,r}	{amount004,,r}	
{item005}	{description005}	{quantity005,,r}	{price005,,r}	{amount005,,r}	
{item006}	{description006}	{quantity006,,r}	{price006,,r}	{amount006,,r}	
{item007}	{description007}	{quantity007,,r}	{price007,,r}	{amount007,,r}	
{item008}	{description008}	{quantity008,,r}	{price008,,r}	{amount008,,r}	
{item009}	{description009}	{quantity009,,r}	{price009,,r}	{amount009,,r}	
{item010}	{description010}	{quantity010,,r}	{price010,,r}	{amount010,,r}	
{item011}	{description011}	{quantity011,,r}	{price011,,r}	{amount011,,r}	
{item012}	{description012}	{quantity012,,r}	{price012,,r}	{amount012,,r}	
{item013}	{description013}	{quantity013,,r}	{price013,,r}	{amount013,,r}	
{item014}	{description014}	{quantity014,,r}	{price014,,r}	{amount014,,r}	
{item015}	{description015}	{quantity015,,r}	{price015,,r}	{amount015,,r}	
{item016}	{description016}	{quantity016,,r}	{price016,,r}	{amount016,,r}	
{item017}	{description017}	{quantity017,,r}	{price017,,r}	{amount017,,r}	
{box28[1]} {invoice-total-terms}			Invoice total {currency}	{invoice-total,,r}	
{declaration[01]} {declaration[02]} {declaration[03]} {declaration[04]} {declaration[05]} {declaration[06]} {declaration[07]} {declaration[08]} {declaration[09]} {declaration[10]} {declaration[11]} {declaration[12]} {declaration[13]} {declaration[14]} {declaration[15]}					
{box26b[1]} {box26b[2]} {footer-text1} {footer-text2}			Name of signatory {officer-name}		
			Place and date of issue {place-of-issue}		
			Signature {signature}		

Sample of a Packing List's Continuation Page Layout

PACKING LIST				
Seller (name, address) {consignor-name} {consignor-adr1} {consignor-adr2} {consignor-adr3} {consignor-adr4}		{consignor-vatm}	Invoice number {invoice-number}	{page-number}
			Invoice date (tax point) {invoice-date}	Seller's reference {sellers-reference}
		Phone: {consignor-phone} Fax: {consignor-fax}	Buyer's reference {buyers-reference}	Other reference {other-reference}
Consignee {consignee-name} {consignee-adr1} {consignee-adr2} {consignee-adr3} {consignee-adr4}		{consignee-vatm}	Buyer (if not consignee) {buyer-name} {buyer-adr1} {buyer-adr2} {buyer-adr3} {buyer-adr4}	{buyer-vatm}
Item/ packages	Description	Quantity	Other details	
{item001}	{description001}	{quantity001,,r}	{other-details001}	
{item002}	{description002}	{quantity002,,r}	{other-details002}	
{item003}	{description003}	{quantity003,,r}	{other-details003}	
{item004}	{description004}	{quantity004,,r}	{other-details004}	
{item005}	{description005}	{quantity005,,r}	{other-details005}	
{item006}	{description006}	{quantity006,,r}	{other-details006}	
{item007}	{description007}	{quantity007,,r}	{other-details007}	
{item008}	{description008}	{quantity008,,r}	{other-details008}	
{item009}	{description009}	{quantity009,,r}	{other-details009}	
{item010}	{description010}	{quantity010,,r}	{other-details010}	
{item011}	{description011}	{quantity011,,r}	{other-details011}	
{item012}	{description012}	{quantity012,,r}	{other-details012}	
{item013}	{description013}	{quantity013,,r}	{other-details013}	
{item014}	{description014}	{quantity014,,r}	{other-details014}	
{item015}	{description015}	{quantity015,,r}	{other-details015}	
{item016}	{description016}	{quantity016,,r}	{other-details016}	
{item017}	{description017}	{quantity017,,r}	{other-details017}	
{item018}	{description018}	{quantity018,,r}	{other-details018}	
{item019}	{description019}	{quantity019,,r}	{other-details019}	
{item020}	{description020}	{quantity020,,r}	{other-details020}	
{item021}	{description021}	{quantity021,,r}	{other-details021}	
{item022}	{description022}	{quantity022,,r}	{other-details022}	
{item023}	{description023}	{quantity023,,r}	{other-details023}	
{item024}	{description024}	{quantity024,,r}	{other-details024}	
{item025}	{description025}	{quantity025,,r}	{other-details025}	
{item026}	{description026}	{quantity026,,r}	{other-details026}	
{item027}	{description027}	{quantity027,,r}	{other-details027}	
{item028}	{description028}	{quantity028,,r}	{other-details028}	
{item029}	{description029}	{quantity029,,r}	{other-details029}	
{item030}	{description030}	{quantity030,,r}	{other-details030}	
{item031}	{description031}	{quantity031,,r}	{other-details031}	
{item032}	{description032}	{quantity032,,r}	{other-details032}	
{item033}	{description033}	{quantity033,,r}	{other-details033}	
{item034}	{description034}	{quantity034,,r}	{other-details034}	
{item035}	{description035}	{quantity035,,r}	{other-details035}	
{item036}	{description036}	{quantity036,,r}	{other-details036}	
{item037}	{description037}	{quantity037,,r}	{other-details037}	
{item038}	{description038}	{quantity038,,r}	{other-details038}	
{item039}	{description039}	{quantity039,,r}	{other-details039}	
{item040}	{description040}	{quantity040,,r}	{other-details040}	
{item041}	{description041}	{quantity041,,r}	{other-details041}	
{item042}	{description042}	{quantity042,,r}	{other-details042}	
{item043}	{description043}	{quantity043,,r}	{other-details043}	
{item044}	{description044}	{quantity044,,r}	{other-details044}	
{item045}	{description045}	{quantity045,,r}	{other-details045}	
{item046}	{description046}	{quantity046,,r}	{other-details046}	
{item047}	{description047}	{quantity047,,r}	{other-details047}	
{item048}	{description048}	{quantity048,,r}	{other-details048}	
{item049}	{description049}	{quantity049,,r}	{other-details049}	
{item050}	{description050}	{quantity050,,r}	{other-details050}	
{item051}	{description051}	{quantity051,,r}	{other-details051}	
{item052}	{description052}	{quantity052,,r}	{other-details052}	
{item053}	{description053}	{quantity053,,r}	{other-details053}	
{item054}	{description054}	{quantity054,,r}	{other-details054}	
{item055}	{description055}	{quantity055,,r}	{other-details055}	
{item056}	{description056}	{quantity056,,r}	{other-details056}	
{item057}	{description057}	{quantity057,,r}	{other-details057}	
{item058}	{description058}	{quantity058,,r}	{other-details058}	
{item059}	{description059}	{quantity059,,r}	{other-details059}	

Sample of an Instruction Page Layout

<p>PAPERWORK REDUCTION ACT NOTICE: This information is needed to carry out the terms of the North American Free Trade Agreement (NAFTA). NAFTA requires that, upon request, an importer must provide Customs with proof of the exporter's written certification of the origin of the goods. The certification is essential to substantiate compliance with the rules of origin under the Agreement. You are required to give us this information to obtain a benefit.</p>	<p>The estimated average burden associated with this collection of information is 15 minutes per respondent or recordkeeper depending on individual circumstances. Comments concerning the accuracy of this burden estimate and suggestions for reducing this burden should be directed to U.S. Customs Service, Paperwork Management Branch, Wash-ington DC 20229. Do not send completed form(s) to this office.</p>
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NORTH AMERICAN FREETRADE AGREEMENT CERTIFICATE OF ORIGIN INSTRUCTIONS

For purposes of obtaining preferential tariff treatment, this document must be completed legibly and in full by the exporter and be in the possession of the importer at the time the declaration is made. This document may also be completed voluntarily by the producer for use by the exporter. Please print or type:

FIELD 1: State the full legal name, address (including country) and legal tax identification number of the exporter. Legal tax identification number in Canada, employer number or importer/producer number assigned by Revenue Canada in Mexico, federal taxpayer's registry number (RFC) and in the United States, employer's identification number or Social Security Number.

FIELD 2: Complete field if the Certificate covers multiple shipments of identical goods as described in Field # 5 that are imported into a NAFTA country for a specified period of up to one year (the blanket period). "FROM" is the date upon which the Certificate becomes applicable to the good covered by the blanket Certificate (it may be prior to the date of signing this Certificate). "TO" is the date upon which the blanket period expires. The importation of a good for which preferential treatment is claimed based on this Certificate must occur between these dates.

FIELD 3: State the full legal name, address (including country) and legal tax identification number, as defined in Field #1, of the producer. If more than one producer's good is included on the Certificate, attach a list of additional producers, including the legal name, address (including country) and legal tax identification number, cross-referenced to the good described in Field #5. If you wish this information to be confidential, it is acceptable to state "Available to Customs upon request". If the producer and the importer are the same, complete field with "SAME". If the producer is unknown, it is acceptable to state "UNKNOWN".

FIELD 4: State the full legal name, address (including country) and legal tax identification number, as defined in Field #1, of the importer. If the importer is not known, state "UNKNOWN"; if multiple importers, state "VARIOUS".

FIELD 5: Provide a full description of each good. The description should be sufficient to relate it to the invoice description and to the Harmonized System (H.S.) description of the good. If the Certificate covers a single shipment of a good, include the invoice number as shown on the commercial invoice. If not known, indicate another unique reference number, such as the shipping order number.

FIELD 6: For each good described in Field #5, identify the H.S. tariff classification to six digits. If the good is subject to a specific rule of origin in Annex 401 that requires eight digits, identify to eight digits, using the H.S. tariff classification of the country into whose territory the good is imported.

FIELD 7: For each good described in Field #5, state which criterion (A through F) is applicable. The rules of origin are contained in Chapter Four and Annex 401. Additional rules are described in Annex 703.2 (certain agricultural goods), Annex 300-B, Appendix 6 (certain textile goods) and Annex 308.1 (certain automatic data processing goods and their parts). NOTE: In order to be entitled to preferential tariff treatment, each good must meet at least one of the criteria below.

Preference Criteria

A: The good is "wholly obtained or produced entirely" in the territory of one or more of the NAFTA countries as referenced in Article 415. Note: The purchase of a good in the territory does not necessarily render it "wholly obtained or produced". If the good is an agricultural good, see also criterion F and Annex 703.2. (Reference: Article 401(a) and 415)

B: The good is produced entirely in the territory of one or more of the NAFTA countries and satisfies the specific rule of origin, set out in Annex 401, that applies to its tariff classification. This rule may include a tariff classification change, regional value-content requirement, or a combination thereof. The good must also satisfy all other applicable requirements of Chapter Four. If the good is an agricultural good, see also criterion F and Annex 703.2. (Reference: Article 401(b))

C: The good is produced entirely in the territory of one or more of the NAFTA countries exclusively from originating materials. Under this criterion, one or more of the materials may not fall within the definition of "wholly produced or obtained", as set out in Article 415. All materials used in the production of the good must qualify as "originating" by meeting the rules of Article 401(a) through (g). If the good is an agricultural good, see also criterion F and Annex 703.2. Reference: Article 401(c).

D: Goods are produced in the territory of one or more of the NAFTA countries but do not meet the applicable rule of origin, set out in Annex 401, because certain non-originating materials do not undergo the required change in tariff classification. The goods do nonetheless meet the regional value content requirement specified in Article 401 (g). This criterion is limited to the following two circumstances:
 1. The good was imported into the territory of a NAFTA country in an unassembled or disassembled form but was classified as an assembled good, pursuant to H.S. General Rule of Interpretation 2(a), or
 2. The good incorporated two or more non-originating materials, provided for as parts under the H.S., which could not undergo a change in tariff classification because the heading provided for both the good and its parts and was not further subdivided into subheadings, or the subheading provided for both the good and its parts and was not further subdivided.
 NOTE: This criterion does not apply to Chapters 61 through 63 of the H.S. (Reference: Article 401(d))

E: Certain automatic data processing goods and their parts, specified in Annex 308.1, that do not originate in the territory are considered originating upon importation into the territory of a NAFTA country from the territory of another NAFTA country when the most-favored-nation tariff rate of the good conforms to the rate established in Annex 308.1 and is common to all NAFTA countries. (Reference: Annex 308.1)

F: The good is an originating agricultural good under preference criteria A, B, or C above and is not subject to a quantitative restriction in the importing NAFTA country because it is a "qualifying good" as defined in Annex 703.2, Section A or B (please specify). A good listed in Appendix 703.2B.7 is also exempt from quantitative restrictions and is eligible for NAFTA preferential tariff treatment if it meets the definition of "qualifying good" in Section A of Annex 703.2. NOTE 1: This criterion does not apply to goods that wholly originate in Canada or the United States and are imported into other countries. NOTE 2: A tariff rate quota is not a quantitative restriction.

FIELD 8: For each good described in Field #5, state "YES" if you are the producer of the good. If you are not the producer of the good, state "NO" followed by (1), (2), or (3), depending on whether this certificate was based upon: (1) your knowledge of whether the good qualifies as an originating good; (2) your reliance on the producer's written representation (other than a Certificate of Origin) that the good qualifies as an originating good; or (3) a completed and signed Certificate for the good, voluntarily provided to the exporter by the producer.


FIELD 9: For each good described in field #5, where the good is subject to a regional value content (RVC) requirement, indicate "NC" if the RVC is calculated according to the net cost method; otherwise, indicate "NO". If the RVC is calculated over a period of time, further identify the beginning and ending dates (DDMMYY) of that period. (Reference: Articles 402.1, 402.5)

FIELD 10: Identify the name of the country ("MX" or "US" for agricultural and textile goods exported to Canada; "US" or "CA" for all goods exported to Mexico; or "CA" or "MX" for all goods exported to the United States) to which the preferential rate of customs duty applies, as set out in Annex 302.2, in accordance with the Marking Rules or in each party's schedule of tariff elimination. For all other originating goods exported to Canada, indicate appropriately "MX" or "US" if the goods originate in that NAFTA country, within the meaning of the NAFTA Rules of Origin Regulations, and any subsequent processing in the other NAFTA country does not increase the transaction value of the goods by more than seven percent; otherwise "JNT" for joint production. (Reference: Annex 302.2)

FIELD 11: This field must be completed, signed, and dated by the exporter. When the Certificate is completed by the producer for use by the exporter, it must be completed, signed, and dated by the producer. The date must be the date the Certificate was completed and signed.



Customs Form 434 (04/09/97) (Back)

Creating a Layout

To create a layout, click the  button on the toolbar at the bottom of the **Layouts** screen. The Upload Layout File pop-up window is displayed, allowing you to import an ePage layout in MPD file format.


Upload a Layout File Pop-Up


Upload Layout File

* Name:


* Layout MPD file: Select File...

 Upload

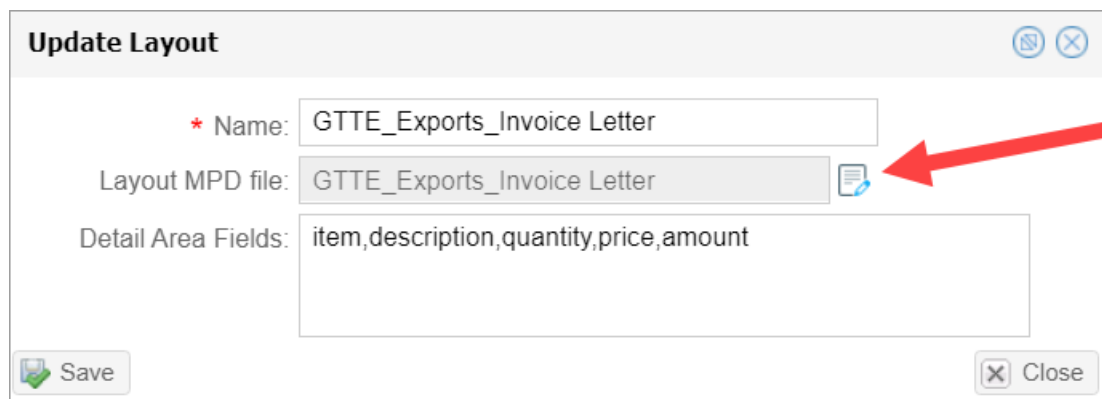
 Close

Give the layout a meaningful name using the Name field. Then use the Layout MPD file field to select a file, and click the Upload button.

When the file is uploaded, the browse grid refreshes to display the newly added layout.

You can update the layout name in the Update Layout window by double-clicking a record, or by selecting a record and clicking the Update  button in the toolbar. It is also possible to update an existing layout with a new MPD file, as shown in the image below.

Update Existing Layout with New MPD File



The following sections describe a few key concepts related to QAD GTTE Docs and mapping data to a document.

Layout Fields

A layout field is a specific location on the layout to which you can map shipment data. When previewing an uploaded layout, layout fields are indicated by a single-line placeholder, or a group of multiline placeholders. An example of a typical single-line placeholder is an invoice number, while a group of multiline placeholders usually represents an address.

Layout Fields, Multiline and Single-Line Placeholders Indicated


Seller (name, address, VAT reg. no.) {consignor-name} {consignor-adr1} {consignor-adr2} ← {consignor-adr3} {consignor-adr4}	{consignor-vatn} Phone: {consignor-phno} Fax: {consignor-fax}	Invoice number {version} {invoice-number} Invoice date (tax point) {invoice-date}	{page-number} Seller's reference {sellers-reference}
Consignee {consignee-name} {consignee-adr1} {consignee-adr2} {consignee-adr3} {consignee-adr4}	{consignee-vatn}	Buyer's reference {buyers-reference} ← Buyer (if not consignee) {buyer-name} {buyer-adr1} {buyer-adr2} {buyer-adr3} {buyer-adr4}	Other reference {other-reference} {buyer-vatn}
{box10[1]} {box10[2]} {box10[3]} {box10[4]}		{box11[1]} {box11[2]} Country of origin of goods {country-of-origin}	Country of destination {country-destination}

Preview Layout

You can preview the uploaded layout using two options: preview with placeholders, or preview without placeholders. Placeholders indicate layout fields where the corresponding text will display when the document is printed.

Note A layout field can consist of one or more placeholders. For example, the manufacturer address layout field, as shown in the example below, is one layout field that contains a number of placeholders. This is because an address can output across multiple lines.

To preview the layout with placeholders, select a layout in the grid and

click the Preview Layout With Placeholders  button at the bottom right of the page. Placeholders are shown in blue text and enclosed in { } brackets.


Preview Layout With Layout Field Placeholders

{page-number}
INVOICE NO. {invoice-number}
MANUFACTURER:
{manufacturer-name} {manufacturer-adr1} {manufacturer-adr2} {manufacturer-adr3} {manufacturer-adr4}

Note Layout fields are left aligned by default. However, some layout fields may contain a legacy notation of „,r, which aligns the field to the right. Layout field alignment is now typically set in the Document Mapping area rather than this method.

Legacy Notation, Right Align Layout Fields

Quantity	Unit price	Amount
{quantity00},,r	{price00},,r	{amount00},,r

To preview the layout without placeholders, select a layout and click the Preview Layout  button.

Preview Layout Without Layout Field Placeholders

INVOICE NO.
MANUFACTURER:

Detail Area

The detail area on a layout lists line information—for example, items or packages—on a given shipment. It is a collection of layout fields that, individually, provide specific information. When grouped together, this data forms a comprehensive list of line items.

Its purpose is to properly align information across the column, so that the relevant item or pack information is grouped together on the same line.

Detail Area Sample


Item / Packages	Description	Quantity	Unit price	Amount
{item001}	{description001}	quantity001,,r}	{price001,,r}	{amount001,,r}
{item002}	{description002}	quantity002,,r}	{price002,,r}	{amount002,,r}
{item003}	{description003}	quantity003,,r}	{price003,,r}	{amount003,,r}
{item004}	{description004}	quantity004,,r}	{price004,,r}	{amount004,,r}
{item005}	{description005}	quantity005,,r}	{price005,,r}	{amount005,,r}
{item006}	{description006}	quantity006,,r}	{price006,,r}	{amount006,,r}
{item007}	{description007}	quantity007,,r}	{price007,,r}	{amount007,,r}
{item008}	{description008}	quantity008,,r}	{price008,,r}	{amount008,,r}
{item009}	{description009}	quantity009,,r}	{price009,,r}	{amount009,,r}
{item010}	{description010}	quantity010,,r}	{price010,,r}	{amount010,,r}
{item011}	{description011}	quantity011,,r}	{price011,,r}	{amount011,,r}
{item012}	{description012}	quantity012,,r}	{price012,,r}	{amount012,,r}
{item013}	{description013}	quantity013,,r}	{price013,,r}	{amount013,,r}
{item014}	{description014}	quantity014,,r}	{price014,,r}	{amount014,,r}
{item015}	{description015}	quantity015,,r}	{price015,,r}	{amount015,,r}
{item016}	{description016}	quantity016,,r}	{price016,,r}	{amount016,,r}
{item017}	{description017}	quantity017,,r}	{price017,,r}	{amount017,,r}

When a layout is uploaded to QAD GTTE Docs, the system checks for layout fields that end in 00, followed by a number; for example, item005, quantity001, or description 016, as shown in the sample above. If a layout field with this format is detected, it is automatically recognized as a detail area field and becomes associated with the layout's detail area.

The Detail Area Fields column on the **Layouts** screen is then populated by the detected fields.

Detail Area Fields Column is Automatically Populated

Name ↑	Detail Area Fields ↑
InvoiceFirstPageDocs	item,description,quantity,price,amount



You can also manually add fields that you want to associate with the detail area. To do this, double-click a record, or select a record and click the Update  button in the toolbar. Add the field name to the comma-separated list and click Save.

Update Layout Window

Update Layouts ⓘ ×

* Name:

Detail Area Fields:

 Save
 Close

If the MPD file contains an external name in the FormInfo field, the External Name column on the **Layouts** screen is also automatically populated.

Data Configuration

This section describes the functionality of the menu items under the Data Configuration area.

- [Data Tags on page 1776](#)
- [Tokens on page 1793](#)
- [Images on page 1796](#)

Data Tags

Creating a Data Tag

The **Data Tags** screen contains predefined pieces of shipment data available to QAD GTTE Docs. Each data tag represents a single piece of data on a shipment, such as destination and shipment items.

A data tag can also represent general information that does not directly relate to a shipment, but typically appears on a document; for example, the current date and time, and document page number.

Data Tags


Name ↑	Description	Source	Source Id	Data Path
account-detail	Account details The data pro...	GTTE Exports	1	\$.transaction.accountDetail
activity	Activity The data provided is ...	GTTE Exports	1	\$.transaction.activity
actual-arrival-date	Actual arrival date The data ...	GTTE Exports	1	\$.transaction.actualArrivalDate
actual-arrival-time	Actual arrival time The data ...	GTTE Exports	1	\$.transaction.actualArrivalTime
actual-costs-complete	Actual costs complete The d...	GTTE Exports	1	\$.transaction.actualCostsComplete
actual-departure-date	Actual departure date The d...	GTTE Exports	1	\$.transaction.actualDepartureDate
actual-departure-time	Actual departure time The d...	GTTE Exports	1	\$.transaction.actualDepartureTime
actual-letter-of-credit-number	Actual letter of credit number...	GTTE Exports	1	\$.transaction.actualLetterOfCreditNumber
additional-reference	Additional reference The dat...	GTTE Exports	1	\$.transaction.additionalReference
adjustment-mode	Adjustment Mode The data p...	GTTE Exports	1	\$.transaction.adjustmentMode
adjustment-round	Adjustment Round The data ...	GTTE Exports	1	\$.transaction.adjustmentRound
advance-payment-required	Advance payment required T...	GTTE Exports	1	\$.transaction.advancePaymentRequired
advise-due-date-tlx	Advise Due date tlx The data...	GTTE Exports	1	\$.transaction.adviseDueDateTlx
advise-reason-telex	Advise reason telex The dat...	GTTE Exports	1	\$.transaction.adviseReasonTelex
advise-reason-telex2	Advise reason telex The dat...	GTTE Exports	1	\$.transaction.adviseReasonTelex2
aes-itn	AES ITN The data provided i...	GTTE Exports	1	\$.transaction.aesItn
aes-message-code	AES Message Code The dat...	GTTE Exports	1	\$.transaction.aesMessageCode

The purpose of data tags is to enable you to map specific data held in the QAD GTTE database or the QAD GTTE Docs application to a layout field on a document.

For example, the country-of-origin-code data tag represents the country of origin code stored on the shipment header record, XMSHDR0.SHCORG.


The sample invoice below displays layout fields to which data tags can be mapped.

Layout Fields in Preview

 CUSTOMS INVOICE	
SELLER: {seller-name} {seller-adr1} {seller-adr2} {seller-adr3} {seller-adr4} EIN #: {ein-number-seller}	MANUFACTURER: {manufacturer-name} {manufacturer-adr1} {manufacturer-adr2} {manufacturer-adr3} {manufacturer-adr4}
BUYER: {buyer-name} {buyer-adr1} {buyer-adr2} {buyer-adr3} {buyer-adr4}	SHIP TO: {ship-to-name} {ship-to-adr1} {ship-to-adr2} {ship-to-adr3} {ship-to-adr4}

In the Document Mapping window for this sample, the imp-selling-party-name data tag is mapped to the seller-name layout field.

imp-selling-party-name Data Tag Mapped to seller-name Layout Field on Document



SELLER:

{seller-name}

{seller-adr1}

{seller-adr2}


{seller-adr3}

{seller-adr4}

EIN #: {ein-number-seller}

Mapping Details

- 🗑️ ▶ imp-party-name-selection [SUPPLIER]
- 🗑️ ▶
- 🗑️ ▶
- 🗑️ ▶



Note Users are provided with a comprehensive list of predefined data tags that are maintained by QAD GTTE. These cover shipment elements

that are typically found on invoices and packing lists. If you want to create a custom data tag that is specific to your organization, or configure an existing one, please consult QAD GTTE Services.

The fields in the Create/Update Data Tag window are explained in the sections below.

Create Data Tag Window

The screenshot shows a window titled "Create Data Tag" with three main sections:

- General:** Contains fields for * Name (text input), Description (text area), and * Source (dropdown menu).
- Technical Details:** Contains fields for * Data Path (text input), * Data Type (dropdown menu), Possible Values (text input with an information icon), Check For Tokens (checkbox), List Data Tag (checkbox), Replace Newline (checkbox), Selection (checkbox), and * Data Source (dropdown menu).
- Filtering Details:** Contains fields for * Primitive Data Type (dropdown menu with an information icon), Database Table (dropdown menu with an information icon), Database Column (text input with an information icon), * Entity (dropdown menu with an information icon), Sub-Entity (dropdown menu with an information icon), * Business Type (dropdown menu with an information icon), * Core Type (dropdown menu with an information icon), and * Category (dropdown menu with an information icon).

At the bottom of the window, there are "Save" and "Close" buttons.

Name

Each data tag has a unique and meaningful name so that it is easily identified; for example, carrier-address for the carrier address on a given transaction.

Description

Describes the purpose of the data tag.

Source

This field is available if the Data Source field is set to JSON or CALCULATED. It enables you to associate the data tag with a particular QAD GTTE system—GTTE Exports or GTTE Imports—so that the user is provided with relevant data tags during the document mapping process.

Source Field

Create Data Tag

* Name:

* Data Source: **JSON** ▼

* Data Path:

Check For Tokens:

Description:

* Data Type:

Possible Values: ⓘ

Replace Newline:

List Data Tag:

* Source:

Selection:

Save Close

Data Path

This field specifies the location or path of the data tag within the selected data source.

Data Type

The data type is a classification that specifies the type of value a data tag has. It determines the additional configuration options that may be available to the user in the Document Mapping window; for example, if a user adds a data tag in the Document Mapping window that is classified as a DATE type, they are presented with additional date format settings.

Depending on the value selected from the Data Type dropdown list, you may be provided with additional fields to configure the data tag. For example, if DECIMAL is selected, two new fields are displayed; Decimal Places and Rounding Type.

- BLANK-LINE. Enables the user to add a blank line to a layout field.
- DATE. Displays date format options when a data tag of this type is selected in the Document Mapping window.

Note The date formats in the Document Mapping window can be configured by your administrator using the DOCS DATE FORMAT system code.

- DECIMAL. Two additional fields are displayed in the Create/Update Data Tag window if the data type is DECIMAL; Number Format and Rounding Type. Use these fields to specify the position of the decimal point, and whether the value is rounded up, down, or according to standard rounding rules. The default number format is 0.00.

Note The options in the Number Format dropdown list can be configured by your administrator using the DOCS NUMBER FORMAT system code.

- DYNAMIC-IMAGE. Enables the user to add an image to a document. Users can configure image dimensions and position in the Document Mapping window when they select to add the Image data tag.
- INTEGER. Applies to positive and negative numbers. When selected, the Number Format field is displayed below, providing a dropdown list of the available number formatting options in the database. The formatting options are:
 - ###
 - ###.00
 - ###.000
 - #,###,###
 - #,###,###.00
 - #.00
 - 0.00
 - 0.000

- 00.00
- 000.00
- SIMPLE.
- STRING-ADDRESS. Applies to partner addresses. In the Document Mapping window, users can configure STRING-ADDRESS data tags to output an address over a specified number of lines.

Note The address format options can be configured by your administrator using the DOCS ADDRESS FORMAT system code.

- STRING-MULTILINE.
- STRING-MULTILINE-SORTED.
- STRING-NAME.
- STRING-SINGLELINE.
- TEXT.
- STATIC-TEXT.
- TIME. Applies to time data. In the Document Mapping window, users can configure TIME data tags to output in hh:mm or h:mm AM/PM format.

Note The time format options can be configured by your administrator using the DOCS TIME FORMAT system code.

- DATE-FORMAT. There are currently two data tags of this type; country-of-destination-date-format and country-of-origin-date-format. Depending on the selected data tag, the system outputs the date in the format that is specified on the country's record.

Possible Values

Specify potential output values for the data tag using a comma-separated list; for example *True, False*. This is connected to the rules functionality in the Document Mapping window, where the values entered here are displayed in the If value is dropdown list.

Check For Tokens

This feature enables you to replace tokens in the source data with values from other data tags. Select this field if there is a possibility that some data will need to be replaced. Otherwise, this field should be left blank for performance reasons.

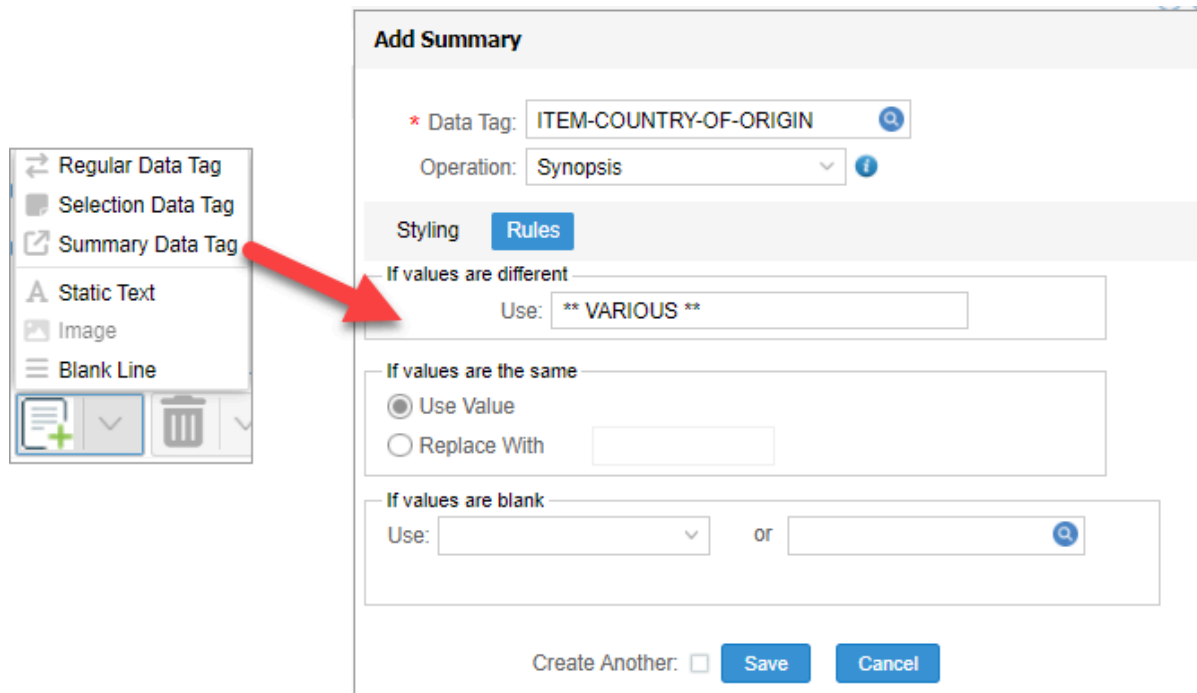
List Data Tag

When a data tag has multiple values, you can choose to summarize the output by enabling this field. This is useful for invoices that have items with multiple countries of origin. In this case, you can display static text

such as Various or Multiple instead of the list of countries. For list data tags, a Rules area is available in the Document Mapping window where you can specify what to print on the document in certain scenarios.

This summary functionality can be accessed through the toolbar of the Mapping Details area. From the Add Data Tag dropdown list, select Summary Data Tag. This displays the Add Summary panel to the right. You can then use the Data Tag lookup to select a list data tag and configure the rules.

Summary Option in Mapping Details Toolbar



Replace Newline

Data from an external source may include a newline character that is indicated by \n. For example:

"The following conditions apply:\n1. The product is not ..."

If this field is enabled, QAD GTTE Docs replaces every instance of \n with a carriage return. As a result, the text that is output on the document is:

"The following conditions apply:

1. The product is not ..."

Scanning for and replacing these characters requires additional processing by the QAD GTTE Docs engine. Therefore, limiting it to only specified data tags that may contain these \n expressions prevents a negative impact on performance.

Selection

This field allows you to declare a data tag as a selection data tag.

This facility is particularly useful if a user needs to map numerous transaction texts, notes, container numbers, and/or seal numbers to a document. Instead of creating a separate data tag for each text on the shipment, it is possible to group similar entities together as selection data tags; for example, texts, notes, or number ranges. During the document mapping process, the user can then filter this data for convenience.

In the example below, a 'text-selection' data tag is created for shipment texts, and declared as a selection data tag using the Selection field. Enabling this field prompts the Selection Label and Selection Name fields to appear.

Declare Data Tag as a Selection Data Tag

Update Data Tag (Info) (Close)

General

* Name:

Description:

* Source:

Technical Details

* Data Path:

Natural ID Context:

* Data Type:

Possible Values: (Info)

Check For Tokens:

List Data Tag:

Replace Newline:

Selection:

* Selection Label:

* Selection Type:

* Data Source:

Filtering Details

* Primitive Data Type: (Info)

Database Table: (Info)

Database Column: (Info)

* Entity: (Info)

Sub-Entity:

* Business Type: (Info)

* Core Type: (Info)

* Category: (Info)

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In the Document Mapping window, the value entered in the Selection Label field is used as the label for the entity lookup.

Selection Tag Label Reflected in Document Mapping Window

Add Selection

* Data Tag: TEXT-SELECTION

Text ID: [Empty]

Use the Selection Name field to specify the entity type: TextID, Note, or Number Range. This determines the contents of the Data Tag lookup window in the Document Mapping window.

The example below shows the contents of the Data Tag lookup when the Selection Name is set to TextId.

Data Tag lookup for Selection Name of TextId, Document Mapping Window

Mapping Details

PACK ITEM

Texts

Text id	Description	Language	Map from I...	Map from f...
007	DGSEA DSHA Notification 1			
008	DGSEA DSHA Notification 2			
009	DGSEA DSHA Notification 3			
010	DGSEA DSHA Notification 4			
011	Other transport details			
012	COO 1-line summary			
013	Remarks			
014	Ext to International carrier			
015	CMR Carrier charges			
016	CMR Senders Instructions			
017	CMR Reservations			

Close

Add Selection

* Data Tag: TEXT-SELECTION

Text ID: [Empty]

Styling Labels Rules

Upper case:

Bold:

Italic:

Underline:

Create Another: Save

Data Source

A data tag can generate information from four possible sources.

Data Source Dropdown

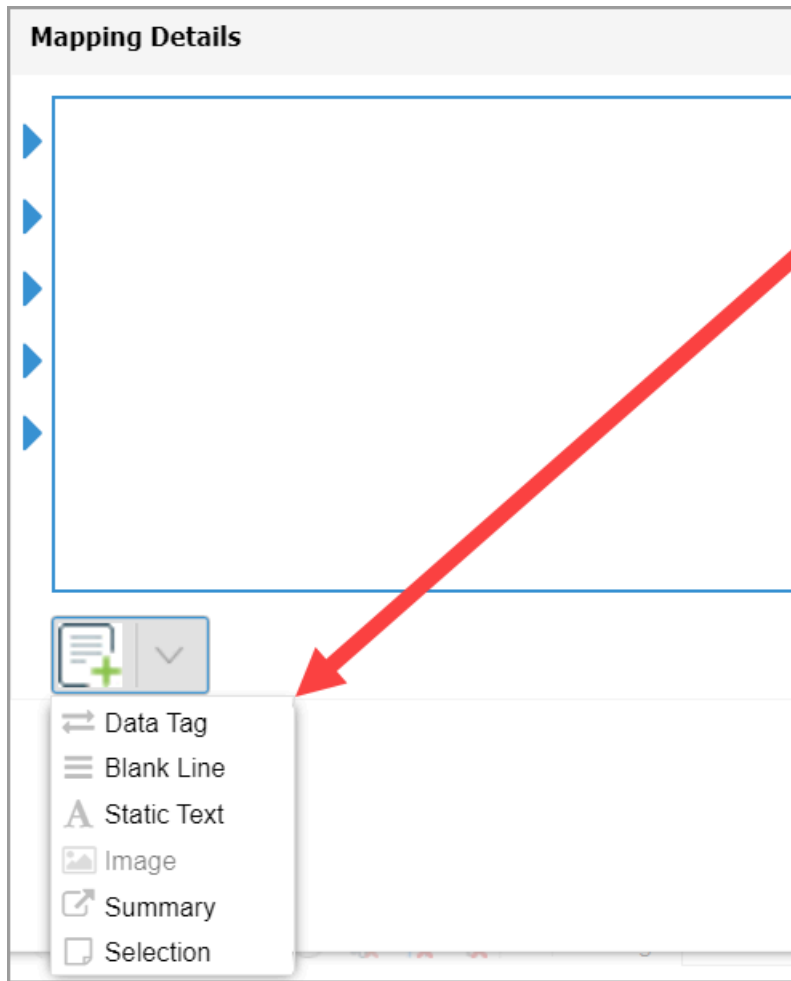
The image shows a 'Create Data Tag' form with the following fields:

- * Name:
- * Data Source: (dropdown menu is open showing options: SYSTEM, JSON, CALCULATED, INTERNAL)
- * Data Path:
- Check For Tokens:
- * Data Type:

Data Sources

Data Source	Description
System	Typically represents information that is generated on an ad hoc basis; for example, the current date, time, or page number.
JSON	Directs QAD GTTE Docs to extract shipment data from the shipment's JSON file.
Calculated	Checks whether data on the shipment needs to be converted, and outputs the conversion on the document if necessary. For example, the total-gross-weight-kg data tag creates a calculated field that converts the total-gross-weight data tag into kilograms.
Internal	For internal use in QAD GTTE Docs. These data tags enable you to output static text, images, or blank lines onto a document using the Mapping window, and are shown in the image below.

Internal Data Tags Used in Mapping Window


**Filtering Details**

The Filtering Details fields enable you to further classify data tags. By completing these fields, users can locate data tags faster and easier when they apply filters in the Data Tag lookup window. See the [Data Tag Lookup on page 1743](#) section for more information.


Filtering Details, Create Data Tag Window

Filtering Details

* Primitive Data Type: 

Database Table: 


Database Column: 

* Entity: 

Sub-Entity: 

* Business Type: 

* Core Type: 

* Category: 

 Save  Close

Filtering Options, Data Tag Lookup Window

Data Tag

- Data Tag

Name:

Description:

- Entities

- Business Types

- Core Types

- Primitive Data Types

- Database Storage

- Other

Primitive Data Type

Indicate how the value is viewed at a technical level by selecting the appropriate data type. The values are source-independent.

Database Table

Specify the source database table from which the data is obtained. The database table represents the general location of the persistence storage for the data. The values are source-independent.

Database Column

Specify the source database column from which the data is obtained. The database column represents the general location of the persistence storage for the data.

Entity

Map the data tag to a specific business entity. This entity represents a physical or logical structure within the business. The available values are specific to the source of the data.

Sub-Entity

In some cases, the entity can be divided into smaller sub-entities that provide a more granular association for the data tag. The available values are specific to the source of the data.

Business Type

Categorize multiple data tags into groups that represent the business value provided by their information. The available values are specific to the source of the data.


Core Type

The solution provides data that can typically be mapped to primitive types of data. The values are source-independent.


Category

Indicate whether the data tag is a summary or non-summary data tag. Typically, data tags with a summary- prefix are summary data tags. The values are source-independent.

Operations

The Operation  button beside each record in the Data Tags grid enables you to access the Operation window, where you can configure the operations that are available for summary data tags.

Operation Button, Data Tags Page

Data Tags				
Name: <input type="text"/>		Search By: <input type="text" value="Description"/>	<input type="text"/>	
<input type="button" value="Search"/>		<input type="button" value="Clear"/>		
Name ↑	Description	Source	Source Id	Data Path
 account-detail	Account details The data pro...	GTTE Exports	1	\$.transaction.accountDetail

In the Operation window, it is possible to update, create, and delete data tag operations.

Note This feature is maintained by QAD GTTE.

Operation Window

Operation [Print] [Close]				
Id: 2900				
Name	Parameter 1	Parameter 2	Parameter 3	Last Modified
COUNT				2021/07/
TOTAL_IN_KG	item-weight-uom-code	KG	MASS	2021/07/
TOTAL_IN_LB	item-weight-uom-code	LB	MASS	2021/07/

[Navigation icons: back, forward, refresh, settings, search, filter, print, copy, paste, delete]

Close

Tokens

Tokens enable you to insert a data tag value within a piece of static text directly in QAD GTTE Docs, or in a note that is set up in the QAD GTTE Transportation Execution (TE) application.

A token is indicated by a \$, followed by a token name contained in curly brackets; for example, `#{Invoice_Number}`.

Tokens Page

Tokens ✓ 🔍					
Name: <input type="text"/>		Search By: <input type="text" value="Description"/>	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Name ↑	Description	Data Tag	Created Date	Created User	Last
client	Client code	client-code	09/19/2019...	DBU	
cnstname	Consignee name	consignee-...	09/19/2019...	DBU	
cononame	Consignor name	consignor-...	04/20/2020...	DBU	
Invoice_Number	Invoice Number	invoice-nu...	04/20/2020...	DBU	

Per Page: 25

The *Tokens* page contains commonly used data elements that users typically want to embed in text. These token names can be used during the document mapping process to display data such as invoice numbers and client codes.

The example below illustrates how to embed the *Invoice_Number* token within static text in the *Document Mapping* window.

Example of a Token Used in Static Text

Add Static Text

Static Text: **B I U**

Invoice number: \${Invoice_Number}

Example of Static Text with Token Output

Consignee	1
Consignee in France	1
137 Rue d'Italie	1
Porte d'Italie	1
PARIS	1
FRANCE	1
<hr/>	
Invoice number: 55415148	1
	1
	1

The following example illustrates how a token is embedded through the *Docs - Shipment Texts* Workflow task in the QAD GTTE TE application.

Note The > character can be used in the QAD GTTE TE application as part of a legacy format to invoke tokens; for example, >Invoice_Number instead of the updated \${Invoice_Number} format. This legacy format is supported and converted by the QAD GTTE Docs engine when generating output that originated from the TE application.

Example of Token Embedded in the Docs - Shipment Texts Workflow Task, TE Application

The screenshot displays the 'Texts [Update]' dialog box in the QAD GTTE Docs application. The dialog contains the following fields and values:

- Client: STGL
- Consignor: A9901_DOCS Precision USA, Sales
- Reference: 0029365
- Despatch number: 0
- Text Id: 002
- Shipment line: 0
- Text: Lorem ipsum dolor sit amet
Invoice number: \${Invoice_Number}

The background shows a table of text records:


Text Id	Ship line	Text
001	0	
002	0	Lorem ipsum dolor sit amet
003	0	This is a long summary text
004	0	
013	0	
030	0	
031	0	
032	0	
033	0	
044	0	
069	0	
086	0	
118	0	

Note For tokens that are embedded in the TE application, you should ensure that the *Check For Tokens* field is selected in the *Data Tags* window. If the token is not displaying in the QAD GTTE Docs document preview, you may need to select the field.

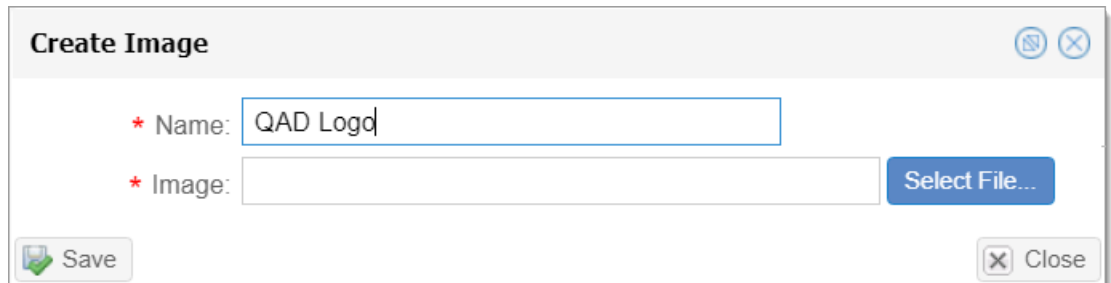
Images

The *Images* page enables you to upload images, which you can then embed in layouts. This is particularly useful if you want to embed a signature or company logo.

To upload an image to the QAD GTTE Docs database:

1. Click the *Create*  button in the toolbar.
2. In the *Name* field of the *Create Image* pop-up window, supply a meaningful image name.

Create Image Window



Create Image

* Name:

* Image:

3. Click the *Select File...* button to browse for the image on your device.
Note The recommended file formats for images are PNG and JPEG.
4. Click *Save*.

This image is now available for mapping in the *Document Mapping* window.

Document Configuration

Note This section includes information for system administrators to help them coordinate with QAD GTTE Support.

Users with an *Administrator* role have access to all areas and configuration options within the QAD GTTE Docs UI.

This section describes the functionality of the menu items under the *Document Configuration* area.

- [Nodes on page 1798](#)
- [Node Structures on page 1800](#)
- [Levels on page 1802](#)
- [Sources on page 1806](#)

Nodes

Important Nodes are an advanced feature of QAD GTTE Docs that are configured and maintained by QAD GTTE. It is not recommended that you modify them. For assistance, please contact QAD GTTE Services.

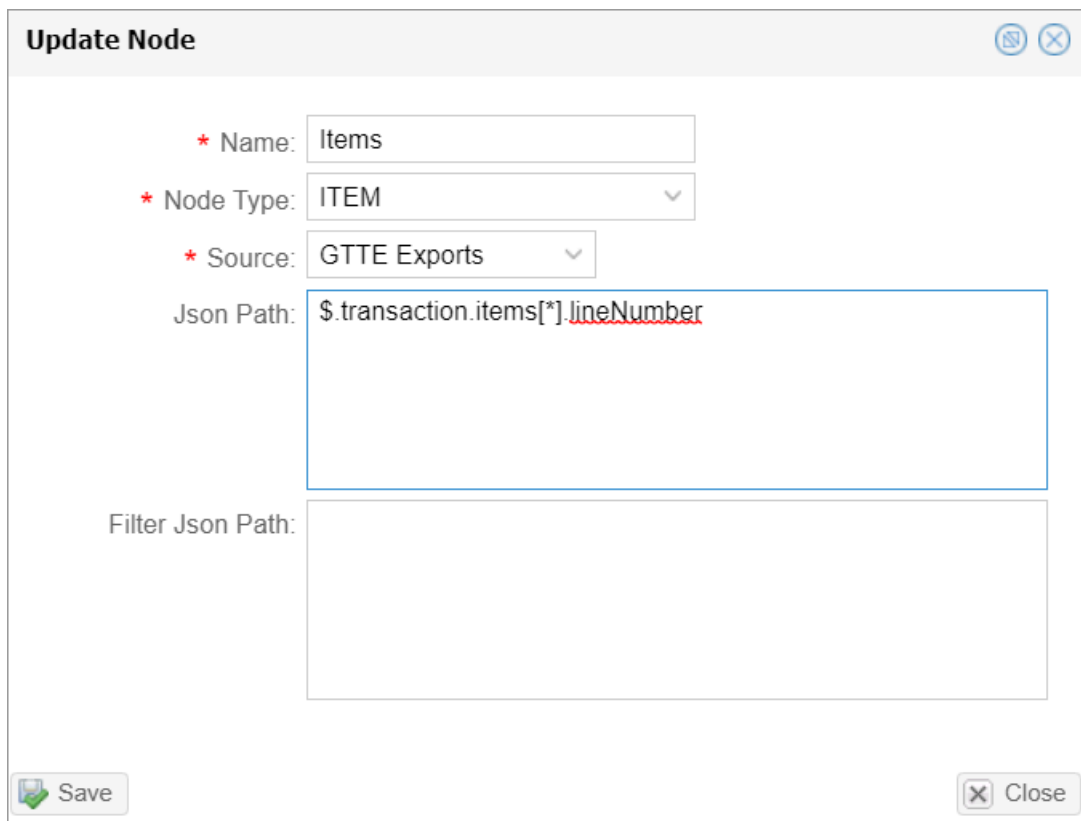
A node is an element that enables the QAD GTTE Docs engine to query the JSON data from the source system, and associate it with business entities; for example, loose packs or serial numbers.

Nodes Page

Name ↑	Node Type	Json Path	Filter Json Path	Created Date
IMP Items	ITEM	\$ transaction.items[*].lineNu...		02/25/2020 15:00:5
Inner Packs	PACK	\$ transaction.packHeaders[?...		07/11/2019 14:26:1
Items	ITEM	\$ transaction.items[*].lineNu...		06/28/2019 05:38:0
Loose Items	ITEM	\$ transaction.items[?(@ unp...		07/30/2019 08:01:1
Loose Lots	LOT	\$ transaction.items.[?(@ line...		09/17/2019 10:06:3
Loose Packs	PACK	\$ transaction.packHeaders[?...		07/29/2019 05:43:4
Lots	LOT	\$ transaction.items[?(@ line...		09/12/2019 18:49:3
Outer Packs	PACK	\$ transaction.packHeaders[?...		07/11/2019 14:26:0
Packed Items	ITEM	\$ transaction.packHeaders[...		06/28/2019 05:38:0
Packed Lots	LOT	\$ transaction.packHeaders[...		09/12/2019 18:47:2

The predefined records on the *Nodes* page cover most business scenarios. However, nodes can be configured by QAD GTTE, if required.

Update Node Window



Update Node

* Name:

* Node Type:

* Source:

Json Path:

Filter Json Path:

The fields in the *Create/Update Node* window are described below.

Name. The name of the node.

Node Type. Choose between five basic node types; *HEADER*, *ITEM*, *LOT*, *PACK*, or *SERIAL*.

Source. Specify the system, or source, from which QAD GTTE Docs obtains data; *GTTE Imports* or *GTTE Exports*.

Json Path. Specify the JSON path that the QAD GTTE Docs engine will use to query the data from the source system.

Filter Json Path. This field is not currently in use.

Node Structures

Important Node structures are an advanced feature of QAD GTTE Docs that are configured and maintained by QAD GTTE. It is not recommended that you modify them. For assistance, please contact QAD GTTE Services.

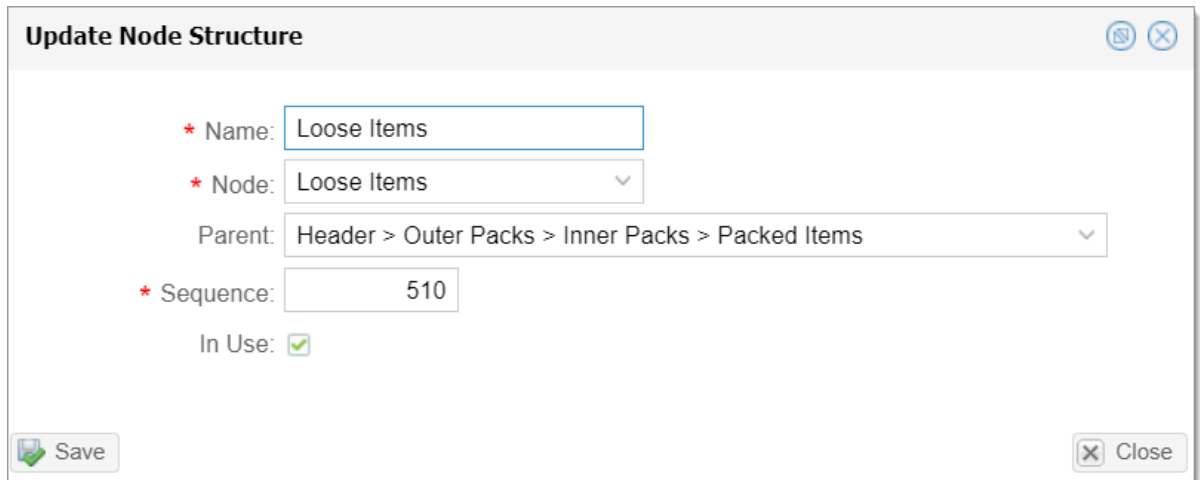
Nodes can be grouped together in a particular order to form a sequence. This is known as a node structure, and determines the order in which information is output on a document.

Node Structures Page

Name ↑	Node	Parent	Sequence	In Use	Last Modified Date
Header > Items	Header		100	✓	01/08/2020 17:28:22
Header > Outer Packs > Inner Packs > Packe...	Header		300	✓	07/11/2019 14:24:59
Header > Outer Packs > Inner Packs > Packe...	Header		1000	✓	09/12/2019 18:55:36
Header > Outer Packs > Inner Packs > Packe...	Header		2000	✓	10/01/2019 18:31:51
Header > Packs > Packed Items	Header		200	✓	
IMP Header > Items	IMP Header		5000	✓	02/27/2020 16:58:57
IMP Items	IMP Items	IMP Header > Items	5100	✓	02/27/2020 16:59:08
Inner Packed Items	Packed Items	Inner Packs	330	✓	07/31/2019 12:22:51
Inner Packed Items [Lots]	Packed Items	Inner Packs [Lots]	1030	✓	09/12/2019 19:04:56
Inner Packed Items [Serials]	Packed Items	Inner Packs [Serials]	2030	✓	10/01/2019 18:50:08
Inner Packed Lots	Packed Lots	Inner Packed Items [Lots]	1040	✓	09/12/2019 19:05:07
Inner Packed Serials	Serial Numbers	Inner Packed Items [Serials]	2040	✓	10/01/2019 18:50:23
Inner Packs	Inner Packs	Outer Packs	320	✓	07/31/2019 12:22:29
Inner Packs [Lots]	Inner Packs	Outer Packs [Lots]	1020	✓	09/12/2019 18:59:06
Inner Packs [Serials]	Inner Packs	Outer Packs [Serials]	2020	✓	10/01/2019 18:49:52
Items	Items	Header > Items	110	✓	

Although the predefined records on the *Nodes* and *Node Structures* pages cover most business scenarios, these menu items provide QAD GTTE with a method of configuring level structures if needed.

Update Node Structure Window



Update Node Structure

* Name: Loose Items

* Node: Loose Items

Parent: Header > Outer Packs > Inner Packs > Packed Items

* Sequence: 510

In Use:

Save Close

The fields in the *Create/Update Node Structure* window are described below.

Name. Provide a meaningful name for the node structure.

Node. Select the node that you want to be last in the sequence.

Parent. Assign a parent to the node selected in the *Node* field. This can be a single node, or a node structure that already exists in the database. The example in the image above has the following node order: *Outer Packs > Inner Packs > Packed Items > Loose Items*.

Sequence. This value must be greater than the sequence value of the parent node.

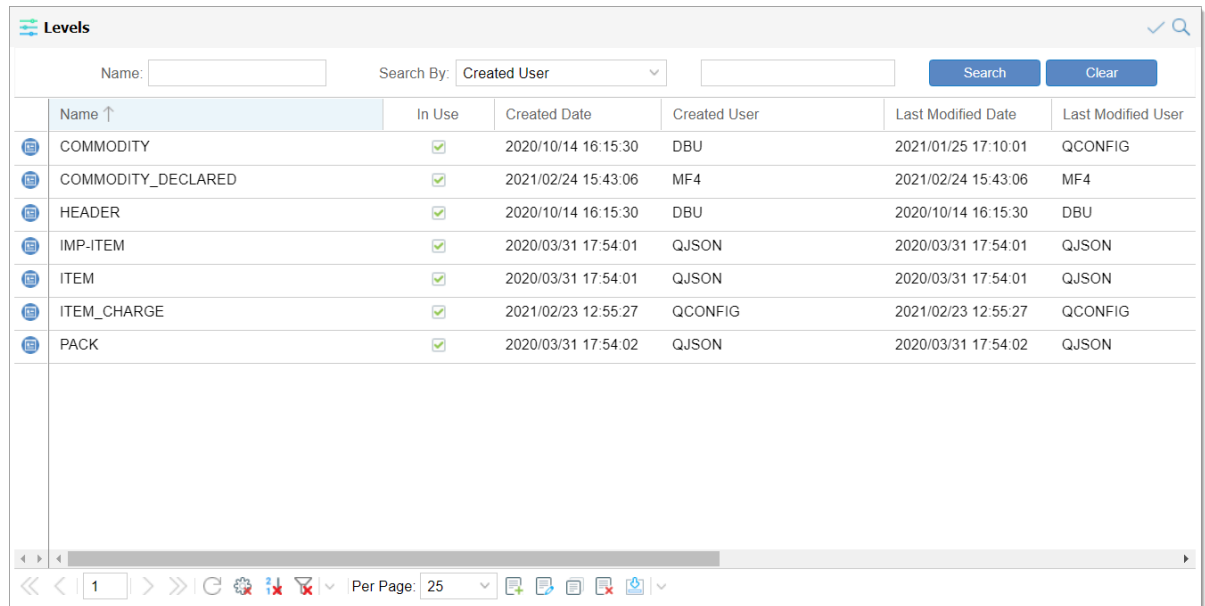
After creating a node structure, you can then assign it to a level in the *Level Structure* window.

Levels

The concept of levels applies to the detail area of a document where product information is output. When QAD GTTE Docs requests shipment data from the transportation execution (TE) application, the assigned level determines the data that is returned to populate the detail area.

Depending on the level specified for a document in the *Create/Update Document* window, the system can output item information, pack information, or both to the detail area.

Levels Page



Name ↑	In Use	Created Date	Created User	Last Modified Date	Last Modified User
COMMODITY	<input checked="" type="checkbox"/>	2020/10/14 16:15:30	DBU	2021/01/25 17:10:01	QCONFIG
COMMODITY_DECLARED	<input checked="" type="checkbox"/>	2021/02/24 15:43:06	MF4	2021/02/24 15:43:06	MF4
HEADER	<input checked="" type="checkbox"/>	2020/10/14 16:15:30	DBU	2020/10/14 16:15:30	DBU
IMP-ITEM	<input checked="" type="checkbox"/>	2020/03/31 17:54:01	QJSON	2020/03/31 17:54:01	QJSON
ITEM	<input checked="" type="checkbox"/>	2020/03/31 17:54:01	QJSON	2020/03/31 17:54:01	QJSON
ITEM_CHARGE	<input checked="" type="checkbox"/>	2021/02/23 12:55:27	QCONFIG	2021/02/23 12:55:27	QCONFIG
PACK	<input checked="" type="checkbox"/>	2020/03/31 17:54:02	QJSON	2020/03/31 17:54:02	QJSON

The currently supported levels are listed under their associated source below:

Exports

HEADER. This level can be used for simple documents that only detail top level shipment information such as the invoice number and date, consignor, consignee, and total weight.

COMMODITY. If selected, the document's detail area displays commodity information. This information is determined at the time of generating the document from the item information on the shipment.

COMMODITY_DECLARED. If selected, the document's detail area displays commodity information. This information comes from the shipment commodity details that are generated when submitting a shipment eCustoms declaration.

ITEM. If selected, the document's detail area displays only the items in the transaction. No pack information is included.

ITEM_CHARGE. If selected, the document's detail area displays all the items in the transaction, followed by details of the charges on the transaction. This is typically used for commercial invoice documents that are required to detail the value of goods, along with other costs; for example VAT and carrier surcharges.

PACK. If selected, the document's detail area displays information about each package in the shipment, as well as the items in the package.

Imports

IMP-ITEM. If GTTE Imports is selected in the Source field, the level is automatically set to IMP-ITEM. This is the same as ITEM level, but refers specifically to the GTTE Imports source.

Document Samples

ITEM-level documents typically have a simple detail area, with each item output across one line. The detail area of a document at *PACK* level offers more complexity. Where applicable, it can provide information on pallets and boxes on the shipment, otherwise known as outer packs and inner packs respectively.

The example below shows an *ITEM*-level document, and lists only the items on the shipment.

Item Level Document

Item / Packages	Description	Quantity	Unit price	Amount
10	Country of Origin: UNITED STATES	32 EA	USD 119.50	USD 3824.00
20	Country of Origin: MEXICO	32 EA	USD 6.50	USD 208.00
30	Country of Origin: UNITED STATES	150 EA	USD 5.50	USD 825.00
40	Country of Origin: MEXICO	150 EA	USD 5.50	USD 825.00
50	Country of Origin: MEXICO	150 EA	USD 4.50	USD 675.00


The example below shows a *PACK*-level document. This level populates the detail area with more detailed shipment information, including pallets and boxes.

Pack Level Document

Item/ packages	Description	Quantity	Other details
1	Pallet(s)		
8209	BOX		Gross: 3.18 KG Net: 3.18 KG
10	Country of Origin: UNITED STATES	32 EA	
20	Country of Origin: MEXICO	32 EA	
8210	BOX		Gross: 3.18 KG Net: 2.27 KG
10	Country of Origin: UNITED STATES	32 EA	
20	Country of Origin: MEXICO	32 EA	




Assigning Level Structures to Levels

As described in the [Document Mapping on page 1733](#) section, you can also assign a level structure to a document after specifying a level. A level structure determines the amount of detail that is output to the detail area, and can be as simple as *Packs > Packed Items*, or as complex as *Outer Packs > Inner Packs > Packed Items > Serial Numbers*.

Select a level in the *Levels* grid and click the *Level Structures*  button to the left of the record. The *Level Structure* window displays, showing a list of [node structures on page 1800](#) that are currently associated with this level.


The image below shows the level structure options for the *PACK* level.

Level Structure Window, PACK Level

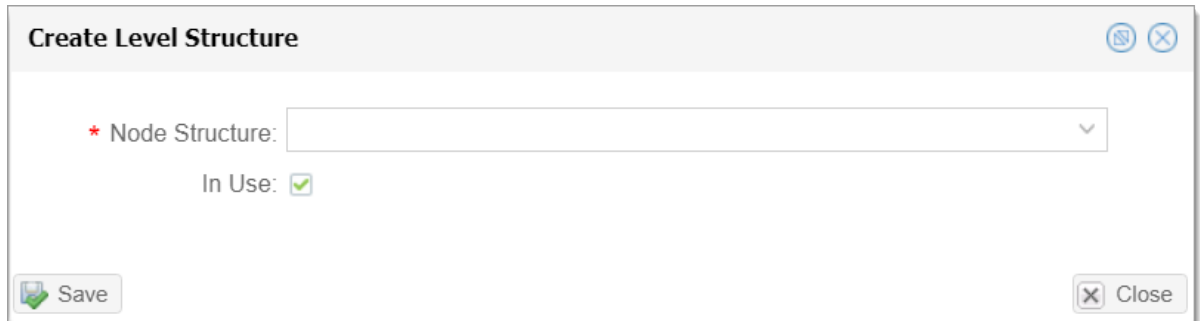
Level Structure 		
Name: PACK Id: 2		
Node Structure	In Use	Last Modified Date
Packs > Packed Items	<input checked="" type="checkbox"/>	
Outer Packs > Inner Packs > Packed Items	<input checked="" type="checkbox"/>	07/11/2019 14:29:15
Outer Packs > Inner Packs > Packed Items > Packed Lots	<input checked="" type="checkbox"/>	09/12/2019 19:07:24
Outer Packs > Inner Packs > Packed Items > Serial Numbers	<input checked="" type="checkbox"/>	10/01/2019 19:04:17
		
 Close		

Creating Level Structures

To create a new level structure record for a particular level:

1. Click the *Create*  button in the toolbar of the *Level Structure* window.
2. Select a node structure from the *Node Structure* drop-down list.
3. Select the *In Use* field if you want this option to be available as a level structure in the *Create/Update Document* window.
4. Click *Save*.



Create Level Structure Window



Create Level Structure

* Node Structure:

In Use:

 Save  Close

Sources

Sources enables administrators to specify the system, or source, from which QAD GTTE Docs obtains data to create a document. The sources that are currently supported are:

- QAD GTTE Global Trade & Transportation Execution Exports (GTTE Exports)
- QAD GTTE Global Trade & Transportation Execution Imports (GTTE Imports)

Sources Page

Name ↑	Description	Endpoint Url	Created Date
GTTE Exports	QAD Precision Global Trade & Transportation Execution Exports	htm/root-api/transportationExecution.ajax	02/07/2020
GTTE Imports	QAD Precision Global Trade & Transportation Execution Imports	htm/root-api/gtmShipmentDocumentData.ajax	02/07/2020

When creating a data tag, users must associate it with a source. Similarly, a document must be associated with a source. This refines the information available in the *Document Mapping* window, so that the user is only presented with data tags that are relevant to the selected source; GTTE Exports or GTTE Imports.

The *Endpoint Url* for each source is the REST API that QAD GTTE Docs uses to access the required data.

Docs System Configuration


This section describes the functionality available in the *System Configuration* area of the QAD GTTE Docs application.

- [Import File on page 1808](#)


Import File

The *Import File* facility is used to import data in JSON format from another QAD GTTE Docs environment. This is particularly useful when transferring data that has been exported from a test environment to a live production environment.

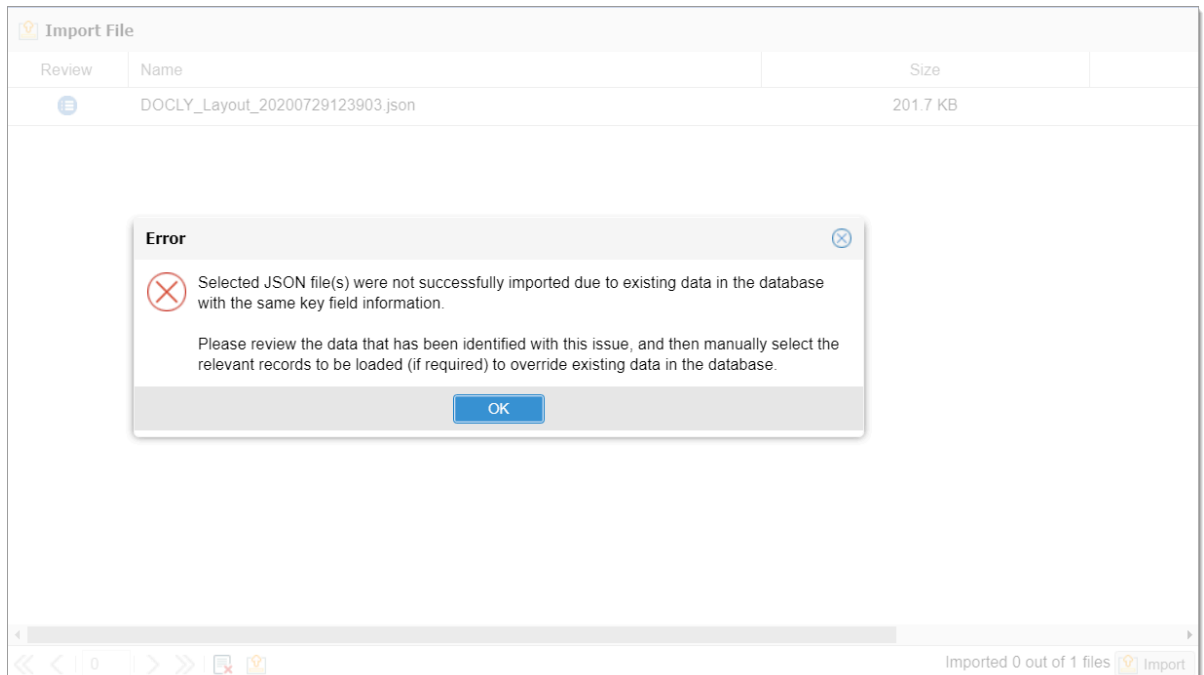
You can export data from a QAD GTTE Docs environment using the

Export  button located in the toolbar on each page. This facility enables you to export selected records only, or all records on the current page.


To import a file:

1. Click the *Upload*  button and select a JSON file. Alternatively, drag and drop a file onto the *Import File* page. An error pop-up displays if the JSON file contains information that is attempting to override existing data in the database.


Import Error



The screenshot shows the 'Import File' window with a table containing one file: 'DOCLY_Layout_20200729123903.json' with a size of 201.7 KB. An error dialog box is overlaid on the table, stating: 'Selected JSON file(s) were not successfully imported due to existing data in the database with the same key field information. Please review the data that has been identified with this issue, and then manually select the relevant records to be loaded (if required) to override existing data in the database.' The dialog has an 'OK' button.

Review	Name	Size
	DOCLY_Layout_20200729123903.json	201.7 KB

2. Click *OK* to close the pop-up.
- 3.

Select the file that is pending review, and click the *Review*  button. The *Duplicate Records* window is displayed.

4.



Click the *View Details* button to expand the details of each record.

5. The *Record Comparison* window is displayed. It shows the record ID, the existing value in the QAD GTTE Docs database, and the new value contained in the JSON file. A warning icon also indicates whether the value in the JSON file is identical or different to the existing value.
6. If you want this data to override existing data, select the record in the *Duplicate Records* window, and click the *Override Records* button at the bottom of the window. The status of the file will change to *Complete* when the override process is complete.

Note An import error may occur in cases where the file is attempting to import an element, such as a data tag or document, with sources that don't currently exist in the database.

Permissions

To set up users in QAD GTTE Docs, follow the standard approach of creating users and associating them with a group using option US. For more information on creating users, see [User Role Configuration on page 219](#).

Each user must then be assigned to a user group with access to the appropriate options for their role.

The following sections describe the configuration of the user groups, option groups, and permissions in QAD GTTE Docs.

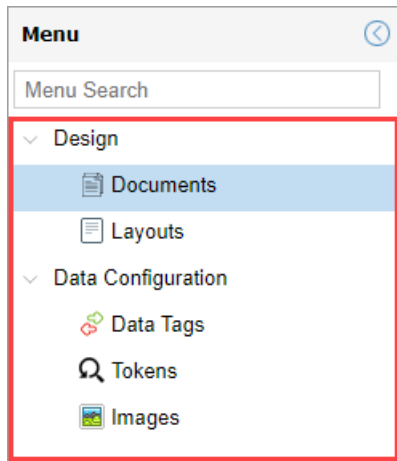
Option Groups

An option is a program that runs in the Web UI; for example, the *Layouts* option. An option group—also known as a function group—is a container for a group of options necessary for a role.

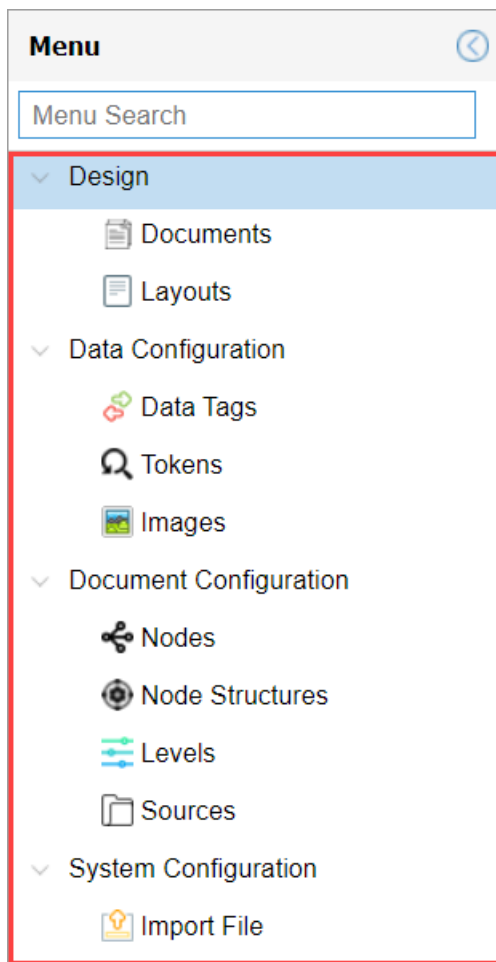
In option FN, two option groups are configured that categorize the options available in QAD GTTE Docs.

- **WEB-DOCS:** Contains options that enable the standard QAD GTTE Docs user to carry out day-to-day tasks; for example, uploading layouts and document mapping. The full list of options is:
 - Documents
 - Layouts
 - Images
 - Data Tags
 - Tokens
- **WEB-DOCS-ADMIN:** Includes all the options contained in the WEB-DOCS group, as well as additional configuration options for an administrator. The full list of options is:
 - Documents
 - Layouts
 - Images
 - Data Tags
 - Tokens
 - Levels
 - Nodes
 - Node Structures
 - Sources
 - Import Files

Options in the WEB-DOCS Option Group



Options in the WEB-DOCS-ADMIN Option Group



User Groups

Users must be assigned to a user group before they can perform any functions in QAD GTTE Docs. It is recommended that permissions be set at group level, rather than configuring them for each individual user.

Two default user groups are configured in option GU, *User Groups & Roles*:

- *WEB-DOCS*: The standard QAD GTTE Docs user who carries out day-to-day tasks; for example, uploading layouts and document mapping.
- *WEB-DOCS-ADMIN*: The administrator is responsible for maintaining and configuring the system.

Configuring Permissions

In option ZP, the option groups are paired with their corresponding user groups, so that the necessary permissions can be applied to the users.

- The WEB-DOCS user group is associated with the WEB-DOCS option group.
- The WEB-DOCS-ADMIN user group is associated with the WEB-DOCS-ADMIN option group.

Advanced Docs Tasks

This section describes how to perform advanced tasks in QAD GTTE Docs.

- [Line Breaks in Lists on page 1816](#)
 - [Adding Line Breaks to Lists in Docs on page 1817](#)

Line Breaks in Lists

If you use the Sort By Hint feature in your documents—as described in [Creating a Document on page 1727](#)—you can also add line breaks to your sorted lists.

Line breaks separate lists in a document into logical blocks, improving readability and maintainability. The following image shows a portion of the document where a break is applied to a list:

Document with Breaks

10	4021111	5.00Each
30	4021111	0.00Each
<hr/>		
60	4022222	1.00Each
<hr/>		
20	4023333	2.00Each
40	4023333	5.00Each
50	4023333	8.00Each

To add breaks, use one or more of the following [data tags on page 1776](#) during [document mapping on page 1733](#). You can map the same data tag multiple times.

item-break-1

Indicates if there is a change in the value of the first field that is sorted from an items list.

item-break-2

Indicates if there is a change in the value of the second field that is sorted from an items list.

pack-break-1

Indicates if there is a change in the value of the first field that is sorted from a pack header list.

pack-break-2

Indicates if there is a change in the value of the second field that is sorted from a pack header list.

Each of the data tags for line breaks has a letter-based set of possible values. You can apply these values at the document mapping stage, as described in [Adding Line Breaks to Lists in Docs on page 1817](#).

Break Data Tag Logic

Value	Description
F	Break on the First (F) entry in the list.
FB	First Break (FB) entry in a new list. The next value is also part of the same group of breaks.



Value	Description
LB	Last Break (LB) entry in the list. The previous value is also part of the same group of breaks.
B	Break (B) where the entry is both the first and last entry in the list.
L	Break on the Last (L) value in the list.
	Blank indicates the value is the same as the previous and the next values.

For example, if your sort by hint is `items=poNumber,description`, to add a break after `poNumber`, valid break logic includes F or FB. To add a break after `description`, valid break logic includes LB or L. This process is described in more detail in [Adding Line Breaks to Lists in Docs on page 1817](#).

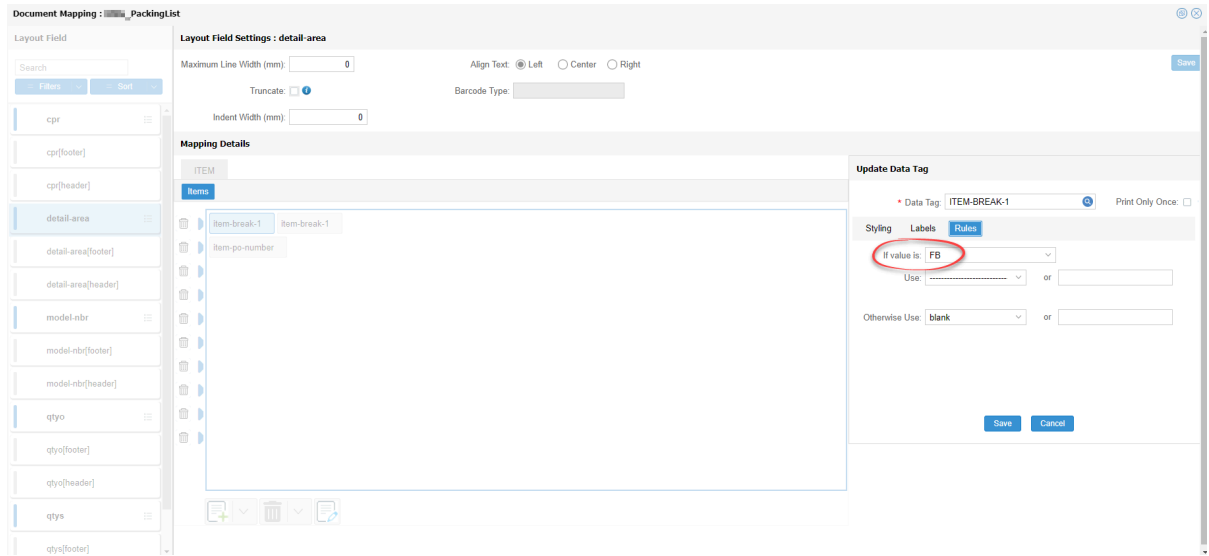
Adding Line Breaks to Lists in Docs

Before you begin, create a document which contains a list sorted by a Sort By Hint value, as described in [Creating a Document on page 1727](#).

To configure the line break data tags and add breaks to your sorted lists, complete the following steps:

1. On the **Documents** screen (menu option DOCS), in the Design > Documents grid, navigate to the document that you want to add a line break to.
2. Click the Document Mapping sub-option for the document .
3. In the Document Mapping window, from the Layout Field panel, select a layout field.
4. On the Layout Field Settings panel, click the Add Data Tag button .
5. On the Add Data Tag panel, from the Add Data Tag lookup, select one of the following tags:
 - If the document contains a list of items, select either `item-break-1` or `item-break-2`.
 - If the document contains a list of pack headers, select either `pack-break-1` or `pack-break-2`.
6. After you select a tag from the lookup, click the Rules button.
7. From the If value is: dropdown list, select one of the break values described in [Table 409 on page 1816](#).
8. In the Use: field, enter a dashed line using the en dash (-) key on your keyboard. You can enter up to 1000 characters.

Mapping a Line Break



9. From the Otherwise Use: dropdown list, select blank.
10. To save the break tag to the document mapping, on the Update Data Tag panel, click Save.
11. Optionally, repeat Steps 3 to 10 to add more break data tags.
12. To save the document mapping, on the Layout Field Settings panel, click Save.
13. To preview the line break, on the Documents panel, select the document and click the Preview Document PDF button in the toolbar. Then, in the Preview Document window, click View Document.

Preview Document PDF Button

