

Version Control Guidelines for RTF Invoice Documents

1. Purpose

This document outlines version control practices for RTF (Rich Text Format) invoice documents, ensuring consistent management, tracking, and retrieval of revisions throughout the invoice lifecycle.

2. Document Naming Convention

Consistently name RTF invoice documents using the following pattern:

- **InvoiceName_YYYMMDD vX.rtf**

Example: Invoice_ACME_20240627_v1.rtf

3. Version Numbering

- **Major (v1, v2...):** Used for significant changes, such as structural updates, template alterations, or data corrections that affect the invoice integrity.
- **Minor (v1.1, v2.2...):** Used for minor text edits, corrections, or clarifications not affecting essential invoice data.

4. Version History Table

Version	Date	Author	Description of Change
v1.0	2024-06-27	J. Smith	Initial release.
v1.1	2024-06-28	J. Smith	Corrected address and contact details.

5. Workflow

- Save a new version whenever a change is made.
- Update the version history table on each revision.
- Retain previous versions for audit and reference.
- Finalized invoices should be marked as "Final" (e.g., **Invoice_ACME_20240627_v2_Final.rtf**).

6. Access and Storage

- Store all versions in a dedicated, secure directory accessible to authorized personnel only.
- Avoid editing finalized (Final) invoices; create a new version if amendments are required.

Important Notes

- Never overwrite existing RTF invoice files; always create a new version with updated number and date.
- Maintain a clear version history within each file or as a centralized record.
- Final (approved) versions should be shared for client or finance use; drafts must be clearly marked.
- Regularly back up invoice version archives to prevent data loss.
- Ensure all invoice versions comply with organizational data retention and security policies.

