

# 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\_YYYYMMDD\_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.

