LATITUDE
Professional Practice Management Software

Latitude Field Ticket WordLink Tag List

Overview

To design your own Invoice documents, use Microsoft Word to modify any existing Word templates you have. If you do not have any existing templates contact your Latitude vendor for sample templates.

This document contains a full list of all the tags and fields available for you to use in your Field Ticket Word templates.

To design a document:

> Think about the overall layout or look you want for the document
> Decide what Latitude data you want to display eg. client name, client address, job number, project name, site address, quote amount, delivery date, invoice line items
> Open a template in Microsoft Word. All templates should be stored in your Latitude Word templates folder eg. L:\WordTemplates\
> Draft the static content (static content refers to any parts of a document that always stay the same eg. your address, general introductions, terms and conditions, and can include graphical elements such as logo's)
> Determine where you want the data to appear in your document
> Search for the tags that represent the fields that hold the data in Latitude
> Place tags in all the locations you want data to appear
> If you are editing a template that has tags you don't need, delete them. You can add them back again when you need them
> Set the template path in Latitude
  ÷ Open any invoice -> on the bottom right click the "Produce Invoice" button
  ÷ Choose the style you want to add the template to. If you want to enter a new style:
    – Double-click any invoice style from the Invoice style list to open the style table
    – Enter a new style name eg. "Standard Invoice" -> click OK
  ÷ Click your selected invoice style -> click "Word Template" in the Invoice template list
  ÷ Click the browse button and locate the invoice Word template eg. "L:\WordTemplates\InvoiceTemplate.dotx"
> Preview the document in Latitude to check everything is how you want it to appear
  ÷ Open an invoice -> on the bottom right click the "Produce Invoice" button
  ÷ Select the style from the invoice style list
  ÷ Click "Print Preview"
> Note any problems and changes you want to make
> Change static content, tags and tag locations in the template and preview again
> Repeat until everything is perfect

Field Ticket

Tag	Description
FT.TicketNo	Field Ticket Number
FT.TicketDate	Field Ticket Date
FT.TicketStyle	Field Ticket Style
FT.Status	Field Ticket Status
FT.SubJobNumber	Field Ticket Sub Job Number
FT.CrewChiefCode	Field Ticket Crew Chief Code
FT.CrewChiefGivenName	Crew Chief's Given Name
FT.CrewChiefGivenNameInitial	Initial of Crew Chief's Given Name
FT.CrewChiefSurname	Crew Chief's Surname
FT.CrewChiefSurnameInitial	Crew Chief's Surname Initial
FT.ClientFieldRep	Client Field Representative
FT.ClientCost	Client Cost
FT.SiteDesc	Site Description
FT.WorkDesc	Work Description
FT.WorkDescApproved	Work Description Approved
FT.Conditions	Weather and Road Conditions
FT.TravelTo	Travel To
FT.ClientRef<1-5>	Client Reference <1-5>
FT.ClientRef<1-5>TypeName	Client Reference <1-5> Type Name
FT.DailyRateTotalQty	Daily Rate Total Quantity
FT.DailyRateTotalAmount	Daily Rate Total Amount

Field Ticket Client Information

Tag	Description
FT.Client.Code	Client Code
FT.Client.Name	Client Name
FT.Client.ABN	Client ABN
FT.Client.Phone	Client Phone
FT.Client.Mobile	Client Mobile
FT.Client.Email	Client Email
FT.Client.Fax	Client Fax
FT.Client.Website	Client Website
FT.Client.OfficeAddr	Client Office Address
FT.Client.OfficeSuburb	Client Office Suburb
FT.Client.OfficeState	Client Office State
FT.Client.OfficePostalCode	Client Office Post Code
FT.Client.OfficePostalCountry	Client Office Country
FT.Client.PostalAddr	Client Postal Address
FT.Client.PostalSuburb	Client Postal Suburb
FT.Client.PostalState	Client Postal State
FT.Client.PostalPostCode	Client Postal Post Code
FT.Client.PostalCountry	Client Postal Country
FT.Client.Relationship	Client Relationship
FT.Client.BusinessType	Client Business Type
FT.Client.Comments	Client Comments
FT.Client.Keywords	Client Keywords
FT.Client.UsrField1-30	Client User Fields

Field Ticket Job Information

Tag	Description
FT.Job.Number	Job Number
FT.Job.Name	Job Name
FT.Job.QuoteAmt	Quoted Amount
FT.Job.Desc	Job Description
FT.Job.ClientRefNo	Job Client Ref No
FT.Job.Type	Job Type
FT.Job.Re	Job RE
FT.Job.Lot	Job Lot
FT.Job.StNo	Job Street Number
FT.Job.StName	Job Street Name
FT.Job.Locality	Job Locality
FT.Job.State	Job State
FT.Job.PostCode	Job Post Code
FT.Job.Country	Job Country
FT.Job.Latitude	Job Latitude
FT.Job.Longitude	Job Longitude
FT.Job.InstructPerson	Job Instructing Person Full Name
FT.Job.InstructPersonGivenName	Job Instructing Person Given Name
FT.Job.InstructPersonSurname	Job Instructing Person Surname
FT.Job.InstructPersonPhone	Job Instructing Person Phone
FT.Job.InstructPersonMobile	Job Instructing Person Mobile
FT.Job.InstructPersonFax	Job Instructing Person Fax
FT.Job.InstructPersonEmail	Job Instructing Person Email
FT.Job.BillingContactGivenName	Job Billing Contact Given Name
FT.Job.BillingContactSurname	Job Billing Contact Surname
FT.Job.BillingContact	Job Billing Contact Full Name
FT.Job.BillingContactPhone	Job Billing Contact Phone
FT.Job.BillingContactMobile	Job Billing Contact Mobile
FT.Job.BillingContactEmail	Job Billing Contact Email
FT.Job.BillingAddr	Job Billing Contact Address

Time and Expense List

Tag	Description
FTTimeAndExpenseList	
FTTimeAndExpenseList.EmployeeCode	Employee Code
FTTimeAndExpenseList.EmployeeGivenName	Employee's Given Name
FTTimeAndExpenseList.EmployeeGivenNameInitial	Initial of Employee's Given Name
FTTimeAndExpenseList.EmployeeSurname	Employee's Surname
FTTimeAndExpenseList.EmployeeSurnameInitial	Employee's Surname Initial
FTTimeAndExpenseList.CrewRole	Crew Role
FTTimeAndExpenseList.CrewRoleName	Crew Role Name
FTTimeAndExpenseList.TimeQty<1-5>	Time Quantity <1-5>
FTTimeAndExpenseList.TimeQtyTotal	Time Quantity Total
FTTimeAndExpenseList.TimeQty<1-5>Approved	Time Quantity <1-5> Approved
FTTimeAndExpenseList.TimeQtyTotalApproved	Time Quantity Total Approved
FTTimeAndExpenseList.ExpenseQty<1-5>	Expense Quantity <1-5>

FTTimeAndExpenseList.ExpenseQtyTotal	Expense Quantity Total
FTTimeAndExpenseList.ExpenseQty<1-5>Approved	Expense Quantity <1-5> Approved
FTTimeAndExpenseList.ExpenseQtyTotalApproved	Expense Quantity Total Approved

Equipment List

Tag	Description
FTEquipmentList	
FTEquipmentList.EquipId	Equipment ID
FTEquipmentList.EquipDesc	Equipment Description
FTEquipmentList.UsageUnit	Equipment Usage Unit
FTEquipmentList.UsageQty	Equipment Usage Quantity
FTEquipmentList.Owners	Equipment Owners
FTEquipmentList.EquipCount	Equipment Count
FTEquipmentList.WorkTypeCoy	Equipment Work Type - Company
FTEquipmentList.WorkTypeEmp	Equipment Work Type - Employee

Supply List

Tag	Description
FTSupplyList	
FTSupplyList.ItemId	Supply Item ID
FTSupplyList.ItemDesc	Supply Item Description
FTSupplyList.ItemWorkType	Supply Item Work Type
FTSupplyList.Amount	Supply Amount
FTSupplyList.OrderNo	Supply Order Number

Disbursement List

FTDisbList	
FTDisbList.DisbDesc	Disbursement Description
FTDisbList.DisbWorkType	Disbursement Work Type
FTDisbList.Amount	Disbursement Amount

Daily Rate List

Tag	Description
FTDailyRateList	
FTDailyRateList.ItemId	Daily Rate Item ID
FTDailyRateList.ItemDesc	Daily Rate Item Description
FTDailyRateList.ItemWorkType	Daily Rate Item Work Type
FTDailyRateList.ChargeRate	Daily Rate Charge Rate

FTDailyRateList.Qty	Daily Rate Quantity
FTDailyRateList.Amount	Daily Rate Amount
FTDailyRateList.OrderNo	Daily Rate Order Number

Document List

Tag	Description
FTDocumentList	
FTDocumentList.DocumentFileName	Document Filename
FTDocumentList.Current	Status of Document (Active or Inactive)
FTDocumentList.EnteredDate	Date Document was Attached
FTDocumentList.EnteredBy	Who Attached Document
FTDocumentList.EnteredByGivenName	Given Name
FTDocumentList.EnteredByGivenNameInitial	Initial of Given Name
FTDocumentList.EnteredBySurname	Surname
FTDocumentList.EnteredBySurnameInitial	Surname Initial