



LATITUDE

Professional Practice Management Software

Latitude Invoice WordLink Tag List



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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 Invoice 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

Invoice

Tag	Description
Inv.MainCoyName	Setup Company Name
Inv.MainCoySpecialities	Setup Company Specialties
Inv.MainCoyNumber	Setup Company Number
Inv.MainCoyOtherNumber	Setup Company Other Number
Inv.MainCoyAddr	Setup Company Address
Inv.MainCoyPostalAddr	Setup Company Postal Address
Inv.MainCoyPartnersAssoc	Setup Company Partners/Associates
Inv.MainCoyPhone	Setup Company Phone
Inv.MainCoyFax	Setup Company Fax
Inv.MainCoyEmail	Setup Company Email
Inv.MainCoyWebsite	Setup Company Website
Inv.MainCoyLogo1Image	Setup Company Bitmap 1
Inv.MainCoyLogo2Image	Setup Company Bitmap 2
Inv.MainCoyLetterHeadImage	Setup Company Letterhead
Inv.InvRef	Invoice Ref
Inv.ClaimNo	Invoice Claim Number
Inv.PostalAddr	Invoice Postal Address
Inv.PayTerms	Invoice Payment Terms
Inv.InvDate	Invoice Date
Inv.DueDate	Invoice Due Date
Inv.DfltGLAcct	Invoice GL Account
Inv.DfltTaxType	Invoice Tax Type (e.g. GST, HST)
Inv.ExTaxAmt	Invoice tax-excluded Amount
Inv.TaxAmt	Invoice Tax Amount
Inv.InvAmt	Invoice tax-included Amount
Inv.TotalClaims	Invoice Total Claims
Inv.TotalPriorClaims	Invoice Total Prior Claim
Inv.Desc	Invoice Description
Inv.WipBf	Invoice WIP Brought Forward
Inv.WipCf	Invoice WIP Carry Forward
Inv.TotalTs	Invoice Total Timesheets
Inv.TotalDisb	Invoice Total Disbursements
Inv.InvStat.Code	Invoice Status Code
Inv.InvStat.Desc	Status Description

Invoice Client Information

Inv.Client.Code	Client Code
Inv.Client.Name	Client Name
Inv.Client.ABN	Client ABN
Inv.Client.Phone	Client Phone
Inv.Client.Mobile	Client Mobile
Inv.Client.Email	Client Email
Inv.Client.Fax	Client Fax
Inv.Client.Website	Client Website
Inv.Client.OfficeAddr	Client Office Address
Inv.Client.OfficeSuburb	Client Office Suburb
Inv.Client.OfficeState	Client Office State
Inv.Client.OfficePostalCode	Client Office Post Code

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Inv.Client.OfficePostalCountry	Client Office Country
Inv.Client.PostalAddr	Client Postal Address
Inv.Client.PostalSuburb	Client Postal Suburb
Inv.Client.PostalState	Client Postal State
Inv.Client.PostalPostCode	Client Postal Post Code
Inv.Client.PostalCountry	Client Postal Country
Inv.Client.Relationship	Client Relationship
Inv.Client.BusinessType	Client Business Type
Inv.Client.Comments	Client Comments
Inv.Client.Keywords	Client Keywords
Inv.Client.UsrFld1-30	Client User Fields

Invoice Contact Information

Inv.Contact.Salutation	Invoice Contact Salutation
Inv.Contact.GivenName	Invoice Contact Given Name
Inv.Contact.SurName	Invoice Contact Surname
Inv.Contact.Phone	Invoice Contact Phone
Inv.Contact.Fax	Invoice Contact Fax
Inv.Contact.Mobile	Invoice Contact Mobile
Inv.Contact.Email	Invoice Contact Email
Inv.Contact.Comments	Invoice Contact Comments
Inv.Contact.JobTitle	Invoice Contact Job Title
Inv.Contact.Department	Invoice Contact Department

Invoice Job Information

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

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Inv.Job.BillingContactSurname	Job Billing Contact Surname
Inv.Job.BillingContact	Job Billing Contact Full Name
Inv.Job.BillingContactPhone	Job Billing Contact Phone
Inv.Job.BillingContactMobile	Job Billing Contact Mobile
Inv.Job.BillingContactEmail	Job Billing Contact Email
Inv.Job.BillingAddr	Job Billing Contact Address

Invoice Legal Description

Tag	Description
Inv.LegalDescList	Building Block Field Tag
Inv.LegalDescList.Desc	Concatenated values of legal descriptions

Multi Company Setup

Tag	Description
Inv.Coy.Code	Company Code
Inv.Coy.Name	Company Name
Inv.Coy.Specialities	Company Specialities
Inv.Coy.Number	Company Number
Inv.Coy.OtherNumber	Company Other Number
Inv.Coy.Addr	Company Address
Inv.Coy.PostalAddr	Company Postal Address
Inv.Coy.PartnersAssoc	Company Partners/Associates
Inv.Coy.Phone	Company Phone
Inv.Coy.Fax	Company Fax
Inv.Coy.Email	Company Email
Inv.Coy.Website	Company Website
Inv.Coy.Logo1Image	Company Bitmap 1
Inv.Coy.Logo2Image	Company Bitmap 2
Inv.Coy.LetterHeadImage	Company Letter Head Image

Invoice Lines

Tag	Description
Inv.MultilineList	Building Block Field Tag
Inv.MultilineList.Detail	Line Details
Inv.MultilineList.CbCode	Line CB Code
Inv.MultilineList.GLAcct	Line GL Account
Inv.MultilineList.Qty	Line Quantity
Inv.MultilineList.Unit	Line Unit
Inv.MultilineList.Rate	Line Rate
Inv.MultilineList.ExTaxAmt	Line tax-excluded Amount
Inv.MultilineList.TaxType	Line Tax Type (e.g. GST, FRE)
Inv.MultilineList.TaxAmt	Line Tax Amount
Inv.MultilineList.LineAmt	Line tax-included Amount
Inv.MultilineList.CurrentClaim	Line Current Claim
Inv.MultilineList.PriorClaims	Line Prior Claim

Timesheets

Tag	Description
Inv.TsList	Building Block Field Tag
Inv.TsList.JobNo	Timesheet Job Number
Inv.TsList.Resource	Timesheet Employee/Equipment Code
Inv.TsList.Date	Timesheet Date
Inv.TsList.WorkType	Timesheet Work Type
Inv.TsList.WorkTypeName	Timesheet Work Type Name
Inv.TsList.WorkTypeDesc	Timesheet Work Type Description
Inv.TsList.TaskCode	Timesheet Task Code
Inv.TsList.WorkDesc	Timesheet Work Description
Inv.TsList.Qty	Timesheet Quantity
Inv.TsList.Rate	Timesheet Charge Rate
Inv.TsList.Amount	Timesheet Charge Amount
Inv.TsList.CBCode	Timesheet CB Code

Disbursements

Tag	Description
Inv.DisbList	Building Block Field Tag
Inv.DisbList.JobNo	Disbursement Job Number
Inv.DisbList.Resource	Disbursement Employee/Equipment Code
Inv.DisbList.Date	Disbursement Date
Inv.DisbList.WorkType	Disbursement Work Type
Inv.DisbList.WorkTypeName	Disbursement Work Type Name
Inv.DisbList.WorkTypeDesc	Disbursement Work Type Description
Inv.DisbList.TaskCode	Disbursement Task Code
Inv.DisbList.WorkDesc	Disbursement Work Description
Inv.DisbList.Qty	Disbursement Quantity
Inv.DisbList.Rate	Disbursement Charge Rate
Inv.DisbList.Amount	Disbursement Charge Amount
Inv.DisbList.CBCode	Disbursement CB Code