



LATITUDE

Professional Practice Management Software

Latitude Packetsheet WordLink Tag List



US & Canada Toll Free 1 866 LATIBIZ Toll Free 1 866 528 4249
Australia 02 8002 4087 New Zealand 09 929 4662
Email support@LatiBiz.com
www.LatiBiz.com

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 Pocketsheet 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

Packet Sheet

Tag	Description
Pkt.MainCoyName	Setup Company Name
Pkt.MainCoySpecialities	Setup Company Specialities
Pkt.MainCoyNumber	Setup Company Number
Pkt.MainCoyOtherNumber	Setup Company Other Number
Pkt.MainCoyAddr	Setup Company Address
Pkt.MainCoyPostalAddr	Setup Company Postal Address
Pkt.MainCoyPartnersAssoc	Setup Company Partners/Associates
Pkt.MainCoyPhone	Setup Company Phone
Pkt.MainCoyFax	Setup Company Fax
Pkt.MainCoyEmail	Setup Company Email
Pkt.MainCoyWebsite	Setup Company Website
Pkt.MainCoyLogo1Image	Setup Company Bitmap 1
Pkt.MainCoyLogo2Image	Setup Company Bitmap 2
Pkt.MainCoyLetterHeadImage	Setup Company Letterhead
Pkt.Job.Number	Job Number
Pkt.Job.Name	Job Name
Pkt.Job.Desc	Job Description
Pkt.Job.Type	Job Type
Pkt.Job.CaptainName	Job Captain/Manager
Pkt.Job.SubCaptainName	Job Sub Captain/Assistant Manager
Pkt.Job.Status	Job Status
Pkt.Job.QuoteAmt	Quoted Amount
Pkt.Job.Date	Job Date
Pkt.Job.DateExpectedEnd	Job Date Expected End
Pkt.Job.DateStart	Job Start Date
Pkt.Job.DateEnd	Job End Date
Pkt.Job.FileNo	Job File Number
Pkt.Job.DP	Job DP
Pkt.Job.Lot	Job Lot
Pkt.Job.StNo	Job Street Number
Pkt.Job.StName	Job Street Name
Pkt.Job.Locality	Job Locality
Pkt.Job.State	Job State
Pkt.Job.PostCode	Job Post Code
Pkt.Job.Latitude	Job Site Latitude
Pkt.Job.Longitude	Job Site Longitude
Pkt.Job.Re	Job RE
Pkt.Job.Parish	Job Parish
Pkt.Job.County	Job County
Pkt.Job.LocalGovt	Job Local Gov't
Pkt.Job.Details	Job Details
Pkt.Job.ClientRefNo	Job Client Ref No
Pkt.Job.InstructPerson	Job Instructing Person Full Name
Pkt.Job.InstructPersonGivenName	Job Instructing Person Given Name
Pkt.Job.InstructPersonSurname	Job Instructing Person Surname
Pkt.Job.InstructPersonPhone	Job Instructing Person Phone
Pkt.Job.InstructPersonMobile	Job Instructing Person Mobile
Pkt.Job.InstructPersonFax	Job Instructing Person Fax
Pkt.Job.InstructPersonEmail	Job Instructing Person Email
Pkt.Job.BillingContact	Job Billing Contact Full Name

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Pkt.Job.BillingContactGivenName	Job Billing Contact Given Name
Pkt.Job.BillingContactSurname	Job Billing Contact Surname
Pkt.Job.BillingContactPhone	Job Billing Contact Phone
Pkt.Job.BillingContactMobile	Job Billing Contact Mobile
Pkt.Job.BillingContactEmail	Job Billing Contact Email
Pkt.Job.BillingAddr	Job Billing Address
Pkt.Job.BillingType	Job Billing Type
Pkt.Job.GLAccount	Job GL Account
Pkt.Job.JobFolder	Job Folder
Pkt.Job.JobPhoto	Job Photo
Pkt.Job.Latitude	Job Site Latitude
Pkt.Job.Longitude	Job Site Longitude
Pkt.Job.UsrFld1~25	Job User Fields 1 - 25
Pkt.Client.Code	Client Code
Pkt.Client.Name	Client Name
Pkt.Client.ABN	Client ABN
Pkt.Client.Phone	Client Phone
Pkt.Client.Mobile	Client Mobile
Pkt.Client.Email	Client Email
Pkt.Client.Fax	Client Fax
Pkt.Client.Website	Client Website
Pkt.Client.OfficeAddr	Client Office Address
Pkt.Client.OfficeSuburb	Client Office Suburb
Pkt.Client.OfficeState	Client Office State
Pkt.Client.OfficePostalCode	Client Office Post Code
Pkt.Client.OfficePostalCountry	Client Office Country
Pkt.Client.PostalAddr	Client Postal Address
Pkt.Client.PostalSuburb	Client Postal Suburb
Pkt.Client.PostalState	Client Postal State
Pkt.Client.PostalPostCode	Client Postal Post Code
Pkt.Client.PostalCountry	Client Postal Country
Pkt.Client.Relationship	Client Relationship
Pkt.Client.BusinessType	Client Business Type
Pkt.Client.Comments	Client Comments
Pkt.Client.Keywords	Client Keywords
Pkt.Client.UsrFld1-30	Client User Fields

Multi Company Setup

Pkt.Coy.Code	Company Code
Pkt.Coy.Name	Company Name
Pkt.Coy.Specialities	Company Specialities
Pkt.Coy.Number	Company Number
Pkt.Coy.OtherNumber	Company Other Number
Pkt.Coy.Addr	Company Address
Pkt.Coy.PostalAddr	Company Postal Address
Pkt.Coy.PartnersAssoc	Company Partners/Associates
Pkt.Coy.Phone	Company Phone
Pkt.Coy.Fax	Company Fax

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Pkt.Coy.Email	Company Email
Pkt.Coy.Website	Company Website
Pkt.Coy.Logo1Image	Company Bitmap 1
Pkt.Coy.Logo2Image	Company Bitmap 2
Pkt.Coy.LetterHeadImage	Company Letter Head

Legal Descriptions

Pkt.LegalDescList	Building Block Field Tag
Pkt.LegalDescList.Desc	Concatenated values of legal descriptions
Pkt.LegalDescList.Note	Legal Description Notes
Pkt.LegalDescList.Usage	Legal Description Usage

Teams

Pkt.TeamList	Building Block Field Tag
Pkt.TeamList.ContactName	Contact Full Name
Pkt.TeamList.ClientName	Contact's Company
Pkt.TeamList.Role	Contact's Role of the Job
Pkt.TeamList.Phone	Contact Phone
Pkt.TeamList.Mobile	Contact Mobile
Pkt.TeamList.Fax	Contact Fax
Pkt.TeamList.Email	Contact Email

Tasks

Pkt.TaskList	Building Block Field Tag
Pkt.TaskList.TaskCode	Task Code
Pkt.TaskList.TaskType	Task Type
Pkt.TaskList.Desc	Task Description
Pkt.TaskList.ResourceName	Resource assigned
Pkt.TaskList.ActualStart	Task Actual Start Date
Pkt.TaskList.ActualEnd	Task Date Completed
Pkt.TaskList.EstimateStart	Task Estimate Start Date
Pkt.TaskList.EstimateEnd	Task Expected End Date
Pkt.TaskList.WorkType	Task Work Type
Pkt.TaskList.EstimateHrs	Task Estimated Hours
Pkt.TaskList.ActualHrs	Task Actual Hours
Pkt.TaskList.CBCode	Task CB Code
Pkt.TaskList.Sequence	Task Sequence

Timesheets

Pkt.TsList	Building Block Field Tag
Pkt.TsList.JobNo	Timesheet Job Number
Pkt.TsList.Resource	Timesheet Employee/Equipment Code
Pkt.TsList.Date	Timesheet Date
Pkt.TsList.WorkType	Timesheet Work Type
Pkt.TsList.TaskCode	Timesheet Task Code

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Pkt.TsList.WorkDesc	Timesheet Work Description
Pkt.TsList.Qty	Timesheet Quantity
Pkt.TsList.Rate	Timesheet Charge Rate
Pkt.TsList.Amount	Timesheet Charge Amount
Pkt.TsList.CBCode	Timesheet CB Code
Pkt.TsList.Unit	Timesheet Unit

Invoices

Pkt.InvList	Building Block Field Tag
Pkt.InvList.InvRef	Invoice Ref
Pkt.InvList.InvDate	Invoice Date
Pkt.InvList.ClientCode	Invoice Client Code
Pkt.InvList.JobNumber	Invoice Job Number
Pkt.InvList.Desc	Invoice Description
Pkt.InvList.ExTaxAmt	Invoice Tax-excluded Amount
Pkt.InvList.TaxAmt	Invoice Tax Amount
Pkt.InvList.InvAmt	Invoice Tax-included Amount