



LATITUDE

Professional Practice Management Software

Latitude Quote 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 Quote 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

Quote Company Details

Tag	Description
Quote.MainCoyName	Setup Company Name
Quote.MainCoySpecialities	Setup Company Specialities
Quote.MainCoyNumber	Setup Company Number
Quote.MainCoyOtherNumber	Setup Company Other Number
Quote.MainCoyAddr	Setup Company Address
Quote.MainCoyPostalAddr	Setup Company Postal Address
Quote.MainCoyPartnersAssoc	Setup Company Partners/Associates
Quote.MainCoyPhone	Setup Company Phone
Quote.MainCoyFax	Setup Company Fax
Quote.MainCoyEmail	Setup Company Email
Quote.MainCoyWebsite	Setup Company Website
Quote.MainCoyLogo1Image	Setup Company Bitmap 1
Quote.MainCoyLogo2Image	Setup Company Bitmap 2
Quote.MainCoyLetterHeadImage	Setup Company Letterhead

Quote Information

Tag	Description
Quote.Code	Quote Code
Quote.Desc	Quote Description
Quote.DateCreated	Quote Date Created
Quote.DateUpdated	Quote Date Updated
Quote.Date	Quote Date
Quote.From	Quote From
Quote.FromGivenName	Quote From Given Name
Quote.FromSurname	Quote From Surname
Quote.DateValidTo	Quote Date Valid To
Quote.NonCurrent	Quote Inactive Flag
Quote.DfltTaxType	Quote Default Tax Type
Quote.PostalAddr	Quote Postal Address
Quote.TotalExTaxAmt	Total Quote Ex-Tax Amount
Quote.TotalTaxAmt	Total Quote Tax Amount
Quote.TotalIncTaxAmt	Total Quote Inc-Tax Amount
Quote.To	Quote To Client
Quote.ToAddr	Quote To Full Address
Quote.ToAddrLine1	Quote To Address Line 1
Quote.ToAddrLine2	Quote To Address Line 2
Quote.ToAddrLine3	Quote To Address Line 3
Quote.ToAddrLine4	Quote To Address Line 4
Quote.ToAddrLine5	Quote To Address Line 5

Quote Lines

Tag	Description
Quote.QuotelineList	Building Block Field Tag
Quote.QuotelineList.Desc	Quote Line Description
Quote.QuotelineList.Hours	Quote Line Hours
Quote.QuotelineList.Cost	Quote Line Cost
Quote.QuotelineList.Charge	Quote Line Charge
Quote.QuotelineList.Perc	Quote Line Percentage
Quote.QuotelineList.CBCode	Quote Line CB Code
Quote.QuotelineList.TaxType	Quote Line Tax Type
Quote.QuotelineList.ExTaxAmt	Quote Line Ex Tax Amount
Quote.QuotelineList.TaxAmt	Quote Line Tax
Quote.QuotelineList.LineAmt	Quote Line Amount

Quote Job Information

Tag	Description
Quote.Job.Number	Job Number
Quote.Job.Name	Job Name
Quote.Job.Desc	Job Description
Quote.Job.Type	Job Type
Quote.Job.CaptainName	Job Captain/Manager
Quote.Job.SubCaptainName	Job Sub Captain/Assistant Manager
Quote.Job.Status	Job Status
Quote.Job.QuoteAmt	Quoted Amount
Quote.Job.Date	Job Date
Quote.Job.DateExpectedEnd	Job Date Expected End
Quote.Job.DateStart	Job Start Date
Quote.Job.DateEnd	Job End Date
Quote.Job.FileNo	Job File Number
Quote.Job.DP	Job DP
Quote.Job.Lot	Job Lot
Quote.Job.StNo	Job Street Number
Quote.Job.StName	Job Street Name
Quote.Job.Locality	Job Locality
Quote.Job.State	Job State
Quote.Job.PostCode	Job Post Code
Quote.Job.Latitude	Job Site Latitude
Quote.Job.Longitude	Job Site Longitude
Quote.Job.Re	Job RE
Quote.Job.Parish	Job Parish
Quote.Job.County	Job County
Quote.Job.LocalGovt	Job Local Gov't
Quote.Job.Details	Job Details
Quote.Job.ClientRefNo	Job Client Ref No
Quote.Job.BillingType	Job Billing Type
Quote.Job.GLAccount	Job GL Account
Quote.Job.JobFolder	Job Folder
Quote.Job.JobPhoto	Job Photo
Quote.Job.UsrFld1~25	Job User Fields 1 - 25
Quote.Job.EnteredBy	Job Entered By Full Name

Latitude Quote WordLink Tag List

Quote.Job.EnteredByEmail	Job Entered By Email
Quote.Job.EnteredByFax	Job Entered By Fax
Quote.Job.EnteredByName	Job Entered By Name
Quote.Job.EnteredByGivenName	Job Entered By Given Name
Quote.Job.EnteredByGivenNameInitial	Job Entered By Given Name Initial
Quote.Job.EnteredBySurname	Job Entered By Surname
Quote.Job.EnteredBySurnameInitial	Job Entered By Surname Initial
Quote.Job.EnteredByMobile	Job Entered By Mobile
Quote.Job.EnteredByPhone	Job Entered By Phone
Quote.Job.InstructPerson	Job Instructing Person Full Name
Quote.Job.InstructPersonGivenName	Job Instructing Person Given Name
Quote.Job.InstructPersonGivenNameInitial	Job Instructing Person Given Name Initial
Quote.Job.InstructPersonSurname	Job Instructing Person Surname
Quote.Job.InstructPersonSurnameInitial	Job Instructing Person Surname Initial
Quote.Job.InstructPersonPhone	Job Instructing Person Phone
Quote.Job.InstructPersonMobile	Job Instructing Person Mobile
Quote.Job.InstructPersonFax	Job Instructing Person Fax
Quote.Job.InstructPersonEmail	Job Instructing Person Email
Quote.Job.InstructPersonTitle	Job Instructing Person Title
Quote.Job.BillingContact	Job Billing Contact Full Name
Quote.Job.BillingContactTitle	Job Billing Contact Title
Quote.Job.BillingContactGivenName	Job Billing Contact Given Name
Quote.Job.BillingContactGivenNameInitial	Job Billing Contact Given Name Initial
Quote.Job.BillingContactSurname	Job Billing Contact Surname
Quote.Job.BillingContactSurnameInitial	Job Billing Contact Surname Initial
Quote.Job.BillingContact	Job Billing Contact Full Name
Quote.Job.BillingContactPhone	Job Billing Contact Phone
Quote.Job.BillingContactMobile	Job Billing Contact Mobile
Quote.Job.BillingContactEmail	Job Billing Contact Email
Quote.Job.BillingAddr	Job Billing Contact Address
Quote.Job.BillingContactFax	Job Billing Contact Fax
Quote.Job.CaptainName	Job Captain Full Name
Quote.Job.CaptainGivenName	Job Captain Given Name
Quote.Job.CaptainGivenNameInitial	Job Captain Given Name Initial
Quote.Job.CaptainSurname	Job Captain Surname
Quote.Job.CaptainSurnameInitial	Job Captain Surname Initial
Quote.Job.CaptainPhone	Job Captain Phone
Quote.Job.CaptainMobile	Job Captain Mobile
Quote.Job.CaptainEmail	Job Captain Email
Quote.Job.CaptainFax	Job Captain Fax
Quote.Job.SubCaptainName	Job SubCaptain Full Name
Quote.Job.SubCaptainGivenName	Job SubCaptain Given Name
Quote.Job.SubCaptainGivenNameInitial	Job SubCaptain Given Name Initial
Quote.Job.SubCaptainSurname	Job SubCaptain Surname
Quote.Job.SubCaptainSurnameInitial	Job SubCaptain Surname Initial
Quote.Job.SubCaptainEmail	Job SubCaptain Email
Quote.Job.SubCaptainMobile	Job SubCaptain Mobile
Quote.Job.SubCaptainPhone	Job SubCaptain Phone
Quote.Job.SubCaptainFax	Job SubCaptain Fax

Quote Client Information

Tag	Description
Quote.Client.Code	Client Code
Quote.Client.Name	Client Name
Quote.Client.ABN	Client ABN
Quote.Client.Phone	Client Phone
Quote.Client.Mobile	Client Mobile
Quote.Client.Email	Client Email
Quote.Client.Fax	Client Fax
Quote.Client.Website	Client Website
Quote.Client.OfficeAddr	Client Office Address
Quote.Client.OfficeSuburb	Client Office Suburb
Quote.Client.OfficeState	Client Office State
Quote.Client.OfficePostalCode	Client Office Post Code
Quote.Client.OfficePostalCountry	Client Office Country
Quote.Client.PostalAddr	Client Postal Address
Quote.Client.PostalSuburb	Client Postal Suburb
Quote.Client.PostalState	Client Postal State
Quote.Client.PostalPostCode	Client Postal Post Code
Quote.Client.PostalCountry	Client Postal Country
Quote.Client.Relationship	Client Relationship
Quote.Client.BusinessType	Client Business Type
Quote.Client.Comments	Client Comments
Quote.Client.Keywords	Client Keywords
Quote.Client.UsrFld1-30	Client User Fields
Quote.Client.MainContactGivenName	Client Main Contact Given Name
Quote.Client.MainContactGivenNameInitial	Client Main Contact Given Name Initial
Quote.Client.MainContactSurname	Client Main Contact Surname
Quote.Client.MainContactSurnameInitial	Client Main Contact Surname Initial
Quote.Client.MainContactTitle	Client Main Contact Title
Quote.Client.MainContactEmail	Client Main Contact Email
Quote.Client.MainContactPhone	Client Main Contact Phone
Quote.Client.MainContactMobile	Client Main Contact Mobile
Quote.Client.MainContactFax	Client Main Contact Fax