



LATITUDE

Professional Practice Management Software

Latitude Statement 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 Statement 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

Statement

Tag	Description
Statement.MainCoyAddr	Setup Company Address
Statement.MainCoyEmail	Setup Company Email
Statement.MainCoyFax	Setup Company Fax
Statement.MainCoyLetterHeadImage	Setup Company Letterhead
Statement.MainCoyLogo1Image	Setup Company Bitmap1
Statement.MainCoyLogo2Image	Setup Company Bitmap2
Statement.MainCoyName	Setup Company Name
Statement.MainCoyNumber	Setup Company Number
Statement.MainCoyOtherNumber	Setup Company Other Number
Statement.MainCoyPartnersAssoc	Setup Company Partners/Associates
Statement.MainCoyPhone	Setup Company Phone
Statement.MainCoyPostalAddr	Setup Company Postal Address
Statement.MainCoySpecialities	Setup Company Specialities
Statement.MainCoyWebsite	Setup Company Website
Statement.TotalAmount	Total Amount
Statement.TotalReceipts	Total Receipts
Statement.TotalBalance	Total Balance
Statement.Total30days	Total Amount for 30 days
Statement.Total60days	Total Amount for 60 days
Statement.Total90days	Total Amount for 90 days
Statement.TotalOver90days	Total Amount for 90 days and above

Statement Line

Statement.StatementLineList	Building Block Field Tag
Statement.StatementLineList.InvAge	Invoice Age
Statement.StatementLineList.InvRef	Invoice Reference
Statement.StatementLineList.InvDate	Invoice Date
Statement.StatementLineList.InvDesc	Invoice Description
Statement.StatementLineList.Amount	Amount
Statement.StatementLineList.Receipts	Receipts
Statement.StatementLineList.Balance	Balance
Statement.StatementLineList.JobNumber	Job Number
Statement.StatementLineList.JobName	Job Name
Statement.StatementLineList.JobDesc	Job Desc
Statement.StatementLineList.JobType	Job Type
Statement.StatementLineList.JobLocality	Job Locality
Statement.StatementLineList.JobStNo	Job Street Number
Statement.StatementLineList.JobStName	Job Street Name
Statement.StatementLineList.JobState	Job State
Statement.StatementLineList.JobCountry	Job Country
Statement.StatementLineList.JobLat	Job Latitude
Statement.StatementLineList.JobLong	Job Longitude

Statement Client Information

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