



# LATITUDE

Professional Practice Management Software

## Latitude Receipt 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 Receipt 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

**Receipt**

| <b>Tag</b>                     | <b>Description</b>                |
|--------------------------------|-----------------------------------|
| Receipt.MainCoyName            | Setup Company Name                |
| Receipt.MainCoySpecialities    | Setup Company Specialities        |
| Receipt.MainCoyNumber          | Setup Company Number              |
| Receipt.MainCoyOtherNumber     | Setup Company Other Number        |
| Receipt.MainCoyAddr            | Setup Company Address             |
| Receipt.MainCoyPostalAddr      | Setup Company Postal Address      |
| Receipt.MainCoyPartnersAssoc   | Setup Company Partners/Associates |
| Receipt.MainCoyPhone           | Setup Company Phone               |
| Receipt.MainCoyFax             | Setup Company Fax                 |
| Receipt.MainCoyEmail           | Setup Company Email               |
| Receipt.MainCoyWebsite         | Setup Company Website             |
| Receipt.MainCoyLogo1Image      | Setup Company Bitmap 1            |
| Receipt.MainCoyLogo2Image      | Setup Company Bitmap 2            |
| Receipt.MainCoyLetterHeadImage | Setup Company Letterhead          |
| Receipt.ReceiptNo              | Receipt Number                    |
| Receipt.ReceiptDate            | Receipt Date                      |
| Receipt.BankAccountName        | Bank Account Number               |
| Receipt.PaymentMethod          | Payment Method                    |
| Receipt.PaymentDetails         | Payment Details                   |
| Receipt.ReconciledDate         | Reconcile Date                    |
| Receipt.ReconciledNote         | Reconcile Note                    |
| Receipt.Payor                  | Receipt Payor                     |
| Receipt.ExTaxAmtReceived       | Receipt tax-excluded Amount       |
| Receipt.TaxAmt                 | Receipt Tax Amount                |
| Receipt.ReceiptAmt             | Receipt tax-included Amount       |
| Receipt.Receipt.ExportedDate   | Receipt Exported Date             |
| Receipt.PostalAddr             | Receipt Postal Address            |
| Receipt.PostalAddrLine1        | Receipt Postal Address Line 1     |
| Receipt.PostalAddrLine2        | Receipt Postal Address Line 2     |
| Receipt.PostalAddrLine3        | Receipt Postal Address Line 3     |
| Receipt.PostalAddrLine4        | Receipt Postal Address Line 4     |
| Receipt.PostalAddrLine5        | Receipt Postal Address Line 5     |

**Receipt Lines**

| <b>Tag</b>                               | <b>Description</b>       |
|--|--------------------------|
| Receipt.ReceiptLineList                  | Building Block Field Tag |
| Receipt.ReceiptLineList.LineNo           | Line Numbrt              |
| Receipt.ReceiptLineList.LineAmt          | Line Amount              |
| Receipt.ReceiptLineList.AccountCategory  | Line Account Category    |
| Receipt.ReceiptLineList.DiscountAmt      | Line Discount Amount     |
| Receipt.ReceiptLineList.DiscountCategory | Line Discount Category   |
| Receipt.ReceiptLineList.LineDetail       | Line Detail              |
| Receipt.ReceiptLineList.LineTaxType      | Line Tax Type            |
| Receipt.ReceiptLineList.JobNo            | Line Job Number          |
| Receipt.ReceiptLineList.InvRef           | Line Invoice Number      |
| Receipt.ReceiptLineList.ClientRef        | Line Client Reference    |

**Receipt Client Information**

|                                    |                         |
|------------------------------------|-------------------------|
| Receipt.Client.Code                | Client Code             |
| Receipt.Client.Name                | Client Name             |
| Receipt.Client.ABN                 | Client ABN              |
| Receipt.Client.Phone               | Client Phone            |
| Receipt.Client.Mobile              | Client Mobile           |
| Receipt.Client.Email               | Client Email            |
| Receipt.Client.Fax                 | Client Fax              |
| Receipt.Client.Website             | Client Website          |
| Receipt.Client.OfficeAddr          | Client Office Address   |
| Receipt.Client.OfficeSuburb        | Client Office Suburb    |
| Receipt.Client.OfficeState         | Client Office State     |
| Receipt.Client.OfficePostalCode    | Client Office Post Code |
| Receipt.Client.OfficePostalCountry | Client Office Country   |
| Receipt.Client.PostalAddr          | Client Postal Address   |
| Receipt.Client.PostalSuburb        | Client Postal Suburb    |
| Receipt.Client.PostalState         | Client Postal State     |
| Receipt.Client.PostalPostCode      | Client Postal Post Code |
| Receipt.Client.PostalCountry       | Client Postal Country   |
| Receipt.Client.Relationship        | Client Relationship     |
| Receipt.Client.BusinessType        | Client Business Type    |
| Receipt.Client.Comments            | Client Comments         |
| Receipt.Client.Keywords            | Client Keywords         |

**Receipt Job Information**

|                             |                                   |
|-----------------------------|-----------------------------------|
| Receipt.Job.Number          | Job Number                        |
| Receipt.Job.Name            | Job Name                          |
| Receipt.Job.Desc            | Job Description                   |
| Receipt.Job.Type            | Job Type                          |
| Receipt.Job.CaptainName     | Job Captain/Manager               |
| Receipt.Job.SubCaptainName  | Job Sub Captain/Assistant Manager |
| Receipt.Job.Status          | Job Status                        |
| Receipt.Job.QuoteAmt        | Quoted Amount                     |
| Receipt.Job.Date            | Job Date                          |
| Receipt.Job.DateExpectedEnd | Job Date Expected End             |
| Receipt.Job.DateStart       | Job Start Date                    |
| Receipt.Job.DateEnd         | Job End Date                      |
| Receipt.Job.FileNo          | Job File Number                   |
| Receipt.Job.DP              | Job DP                            |
| Receipt.Job.Lot             | Job Lot                           |
| Receipt.Job.StNo            | Job Street Number                 |
| Receipt.Job.StName          | Job Street Name                   |
| Receipt.Job.Locality        | Job Locality                      |
| Receipt.Job.State           | Job State                         |
| Receipt.Job.PostCode        | Job Post Code                     |
| Receipt.Job.Latitude        | Job Site Latitude                 |
| Receipt.Job.Longitude       | Job Site Longitude                |
| Receipt.Job.Re              | Job RE                            |
| Receipt.Job.Parish          | Job Parish                        |
| Receipt.Job.County          | Job County                        |

Latitude WordLink Receipt Tag List

|  |   |
|--|---|
| Receipt.Job.LocalGovt                      | Job Local Gov't                           |
| Receipt.Job.Details                        | Job Details                               |
| Receipt.Job.ClientRefNo                    | Job Client Ref No                         |
| Receipt.Job.BillingType                    | Job Billing Type                          |
| Receipt.Job.GLAccount                      | Job GL Account                            |
| Receipt.Job.JobFolder                      | Job Folder                                |
| Receipt.Job.JobPhoto                       | Job Photo                                 |
| Receipt.Job.UsrFld1~25                     | Job User Fields 1 - 25                    |
| Receipt.Job.EnteredBy                      | Job Entered By Full Name                  |
| Receipt.Job.EnteredByEmail                 | Job Entered By Email                      |
| Receipt.Job.EnteredByFax                   | Job Entered By Fax                        |
| Receipt.Job.EnteredByName                  | Job Entered By Name                       |
| Receipt.Job.EnteredByGivenName             | Job Entered By Given Name                 |
| Receipt.Job.EnteredByGivenNameInitial      | Job Entered By Given Name Initial         |
| Receipt.Job.EnteredBySurname               | Job Entered By Surname                    |
| Receipt.Job.EnteredBySurnameInitial        | Job Entered By Surname Initial            |
| Receipt.Job.EnteredByMobile                | Job Entered By Mobile                     |
| Receipt.Job.EnteredByPhone                 | Job Entered By Phone                      |
| Receipt.Job.InstructPerson                 | Job Instructing Person Full Name          |
| Receipt.Job.InstructPersonGivenName        | Job Instructing Person Given Name         |
| Receipt.Job.InstructPersonGivenNameInitial | Job Instructing Person Given Name Initial |
| Receipt.Job.InstructPersonSurname          | Job Instructing Person Surname            |
| Receipt.Job.InstructPersonSurnameInitial   | Job Instructing Person Surname Initial    |
| Receipt.Job.InstructPersonPhone            | Job Instructing Person Phone              |
| Receipt.Job.InstructPersonMobile           | Job Instructing Person Mobile             |
| Receipt.Job.InstructPersonFax              | Job Instructing Person Fax                |
| Receipt.Job.InstructPersonEmail            | Job Instructing Person Email              |
| Receipt.Job.InstructPersonTitle            | Job Instructing Person Title              |
| Receipt.Job.BillingContact                 | Job Billing Contact Full Name             |
| Receipt.Job.BillingContactTitle            | Job Billing Contact Title                 |
| Receipt.Job.BillingContactGivenName        | Job Billing Contact Given Name            |
| Receipt.Job.BillingContactGivenNameInitial | Job Billing Contact Given Name Initial    |
| Receipt.Job.BillingContactSurname          | Job Billing Contact Surname               |
| Receipt.Job.BillingContactSurnameInitial   | Job Billing Contact Surname Initial       |
| Receipt.Job.BillingContact                 | Job Billing Contact Full Name             |
| Receipt.Job.BillingContactPhone            | Job Billing Contact Phone                 |
| Receipt.Job.BillingContactMobile           | Job Billing Contact Mobile                |
| Receipt.Job.BillingContactEmail            | Job Billing Contact Email                 |
| Receipt.Job.BillingAddr                    | Job Billing Contact Address               |
| Receipt.Job.BillingContactFax              | Job Billing Contact Fax                   |
| Receipt.Job.CaptainName                    | Job Captain Full Name                     |
| Receipt.Job.CaptainGivenName               | Job Captain Given Name                    |
| Receipt.Job.CaptainGivenNameInitial        | Job Captain Given Name Initial            |
| Receipt.Job.CaptainSurname                 | Job Captain Surname                       |
| Receipt.Job.CaptainSurnameInitial          | Job Captain Surname Initial               |
| Receipt.Job.CaptainPhone                   | Job Captain Phone                         |
| Receipt.Job.CaptainMobile                  | Job Captain Mobile                        |
| Receipt.Job.CaptainEmail                   | Job Captain Email                         |
| Receipt.Job.CaptainFax                     | Job Captain Fax                           |
| Receipt.Job.SubCaptainName                 | Job SubCaptain Full Name                  |
| Receipt.Job.SubCaptainGivenName            | Job SubCaptain Given Name                 |
| Receipt.Job.SubCaptainGivenNameInitial     | Job SubCaptain Given Name Initial         |

Latitude WordLink Receipt Tag List

|                                      |                                |
|--------------------------------------|--------------------------------|
| Receipt.Job.SubCaptainSurname        | Job SubCaptain Surname         |
| Receipt.Job.SubCaptainSurnameInitial | Job SubCaptain Surname Initial |
| Receipt.Job.SubCaptainEmail          | Job SubCaptain Email           |
| Receipt.Job.SubCaptainMobile         | Job SubCaptain Mobile          |
| Receipt.Job.SubCaptainPhone          | Job SubCaptain Phone           |
| Receipt.Job.SubCaptainFax            | Job SubCaptain Fax             |

**Receipt Invoice Information**

|                              |                             |
|------------------------------|-----------------------------|
| Receipt.Inv.InvRef           | Invoice Ref                 |
| Receipt.Inv.ClaimNo          | Invoice Claim Number        |
| Receipt.Inv.PostalAddr       | Invoice Postal Address      |
| Receipt.Inv.PayTerms         | Invoice Payment Terms       |
| Receipt.Inv.InvDate          | Invoice Date                |
| Receipt.Inv.DueDate          | Invoice Due Date            |
| Receipt.Inv.DfltGLAcct       | Invoice GL Account          |
| Receipt.Inv.DfltTaxType      | Invoice Tax Type (e.g. GST, |
| Receipt.Inv.ExTaxAmt         | Invoice tax-excluded Amount |
| Receipt.Inv.TaxAmt           | Invoice Tax Amount          |
| Receipt.Inv.InvAmt           | Invoice tax-included Amount |
| Receipt.Inv.TotalClaims      | Invoice Total Claims        |
| Receipt.Inv.TotalPriorClaims | Invoice Total Prior Claim   |
| Receipt.Inv.Desc             | Invoice Description         |
| Receipt.Inv.WipBf            | Invoice WIP Brought Forward |
| Receipt.Inv.WipCf            | Invoice WIP Carry Forward   |
| Receipt.Inv.TotalTs          | Invoice Total Timesheets    |
| Receipt.Inv.TotalDisb        | Invoice Total Disbursements |
| Receipt.Inv.InvStat.Code     | Invoice Status Code         |
| Receipt.Inv.InvStat.Desc     | Status Description          |