Ascora

JOB MANAGEMENT MADE EASY

Document Template Guide

Contents

Ascora Document Templates

Ascora utilises Microsoft Word as the basis for document templates created in the system. This enables you to create the quote or invoice document with almost unlimited options for styling and layouts.

You have the power to create Quotation templates that can have full cover pages and enable you to fully sell your products and services.

You can also create multiple templates in the system quickly and easily by downloading an existing template, making the desired adjustments and uploading back into Ascora as a new Document Template.

This document outlines how to use Mail Merge fields in Word and also the various sections that can be used on your Quotes and Invoices.

Inserting Fields

1. On the **Insert** Menu in Word selected **Quick Parts**. Then click **Fields.**
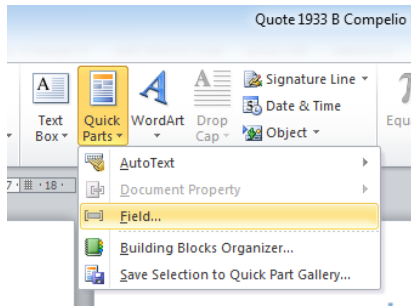
2. Select **MergeField** in the **Fields Names** area and enter the name of the field to be displayed in the **Field Name**, then press **Ok**.
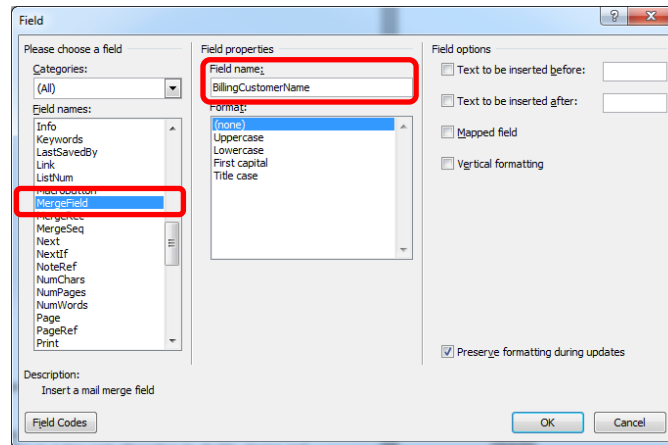
3. The Merge field will be created in the document. When the Quote is generated Ascora will replace this merge field with the data from the Quote.

CUSTOMER
«BillingCustomerName»
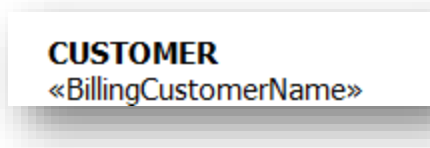
*Note: When editing a Merge field, use the **edit** menu by right-clicking on the field you want to change.*
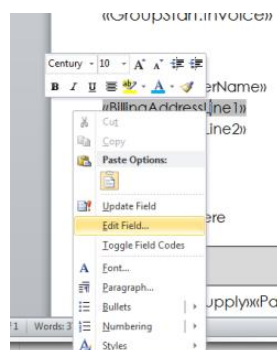
Preparing the Document

To enable the document to correctly generate Table data you need to insert a GroupStart merge field at the start of the document and a GroupEnd merge field at the end of the document.

Note: *These don't need to be exactly at the start or end of the document as long as the tables that will be generated are covered.*

Quotation
«GroupStart:Quote»
.. Document Content Here

«GroupEnd:Quote»

Job
«GroupStart:Job»
.. Document Content Here

«GroupEnd:Job»

Invoice
«GroupStart:Invoice»
.. Document Content Here

«GroupEnd:Invoice»

Purchase Order
«GroupStart:PurchaseOrder»
.. Document Content Here

«GroupEnd:PurchaseOrder»

Scheduler
«GroupStart:Scheduler»
.. Document Content Here

«GroupEnd:Scheduler»

Invoice Example

«GroupStart:Invoice»

Invoice. «InvoiceNo»

«BillingCustomerName»
«BillingAddressLine1»
«BillingAddressLine2»

Site Address:	«SiteAddressLine1»
	«SiteAddressLine2»
Date:	«InvoiceDate»
Due:	«DueDate»

Inserting Images

Adding Supply Images

To add an image against each Supply, the following merge field must be added into the Supply table:

«Image:SupplyImage»

The image by default comes with a standard size, to modify that size, follow this steps:

- add the merge field «Image:SupplyImage»
- after adding the merge field, click right and select the option "Edit Field"
- it will open a dialog box called "Field" on that dialog box, find the area called "Field options" above find and tick the option "Text to be inserted after"
- In from of the option "Text to be inserted after" there is a text box, in this textbox you can add the new size of the image.
- Adding only one value resize the place the image on witdh and height
- Adding two values separated by coma "100,40" it will resize the image on width and height.
- Values must be set in pixels.
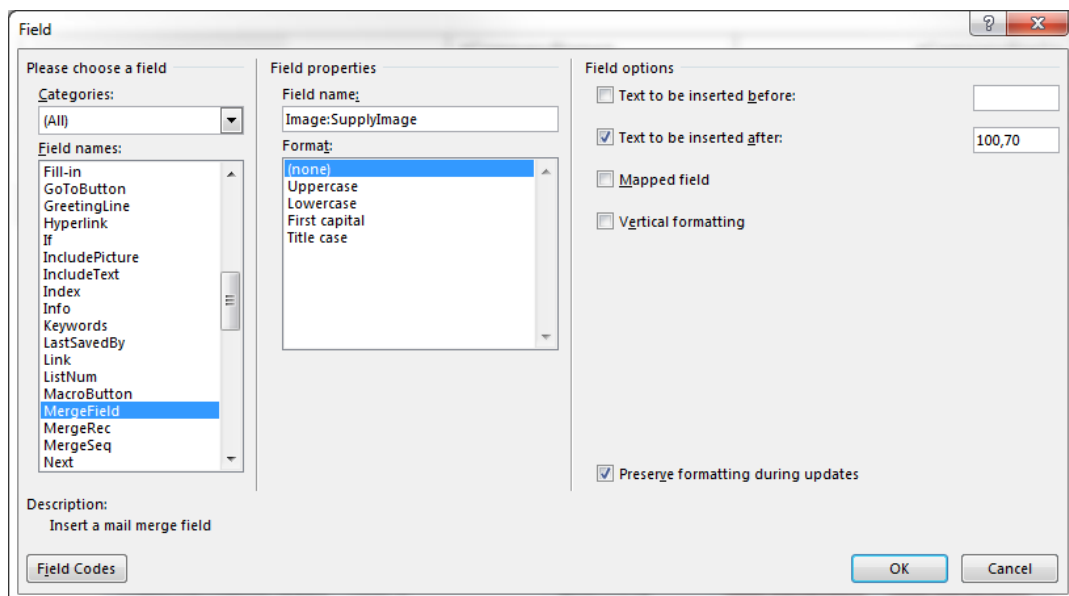
General Tables

These tables apply to most of the templates in Ascora – for example Quotation, Jobs and Invoicing.

Supply

Supplies are intended to be displayed in a table, only works for Quotes, Job and Invoices. The document generator will look for the markers in a table to be used as the start and end of the Supply row.

«TableStart:Supply»		«TableEnd:Supply»

*A description of Supply details, see: **General Additional Tables - Supply**

CallOutFee

Callout Fees are intended to be displayed in a table, only works for Quotes, Job and Invoices. The document generator will look for the markers in a table to be used as the start and end of the Call Out Fee row.

«TableStart:CallOutFee»		«TableEnd:CallOutFee»

*A description of Supply details, see: **General Additional Tables – CallOutFee**

Labour

Labour is intended to be displayed in a table, only works for Quotes, Job and Invoices The document generator will look for the markers in a table to be used as the start and end of the Labour row.

«TableStart:Labour»		«TableEnd:Labour»

* A description of Labour details, see: **General Additional Tables - Labour**

Equipment

Equipment is intended to be displayed in a table, only works for Quotes, Job and Invoices. The document generator will look for the markers in a table to be used as the start and end of the Equipment row.

«TableStart:Equipment»		«TableEnd:Equipment»

*A description of Equipment details, see: **General Additional Tables - Equipment**

Annotation

Annotations associated with Supplies can be placed in a separate list outside of the Supply Table. Only works for Quotes, Jobs and Invoices, Annotation will be placed in a Annotation Table if one exists in the document.

«TableStart:Annotation»		«TableEnd:Annotation»

* A description of Annotation details, see: **General Additional Tables - Annotation**

Booking

Booking is intended to be displayed in a table only on Quotes and Jobs, The document generator will look for the markers in a table to be used as the start and end of the Booking row.

«TableStart:Booking»		«TableEnd:Booking»

* A description of Booking details, see here **General Additional Tables - Booking**

Note

Note is intended to be displayed in a table only on Quotes, The document generator will look for the markers in a table to be used as the start and end of the Note row.

«TableStart:Note»		«TableEnd:Note»

* A description of Note details, see **General Additional Tables - Note**

Attachment

Attachment is intended to be displayed in a table only on Quotes, The document generator will look for the markers in a table to be used as the start and end of the Attachment row.

«TableStart:Attachment»		«TableEnd:Attachment»

* A description of Attachment details, see **General Additional Tables - Attachment**

Quotation Tables

Inclusion Listing

Inclusion is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Inclusion row.

«TableStart:Inclusion»«Text»«TableEnd:Inclusion»

* A description of inclusion listing details, see: **Quotation Additional Tables - Inclusion**

Exclusion Listing

Exclusion is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Exclusion row.

«TableStart:Exclusion»«Text»«TableEnd:Exclusion»

* A description of exclusion listing details, see: **Quotation Additional Tables - Exclusion**

Assumption Listing

Assumption is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Assumption row.

«TableStart:Assumption»«Text»«TableEnd:Assumption»

* A description of assumption listing details, see: **Quotation Additional Tables - Assumption**

Progress Payment

Progress Payment is intended to be displayed in a table only on Quotes. The document generator will look for the markers in a table to be used as the start and end of the Progress Payment row.

«TableStart:ProgressPayment»		«TableEnd:ProgressPayment»

* A description of Progress Payment details, see here: **Quotation Additional Tables – Progress Payment**

Optional Supply

Optional Supply is intended to be displayed in a table only on Quotes, The document generator will look for the markers in a table to be used as the start and end of the Optional Supply row.

«TableStart:OptionalSupply»		«TableEnd:OptionalSupply»

* A description of Optional Supply details, see here **Quotation Additional Tables – Optional Supply**

**

Quotation Section Tables

As Section Summary and Section Details are a complete portion of the document that is duplicated per Section that exists on the Quote it must be entered within a Group field in Word.

Section

«GroupStart:Section»
Section Summary Goes Here – Will Be Repeated Per Quote Section
«GroupEnd:Section»

* A description of Section Summary details, see: **Quotation Section Additional Tables, Section.**

Section Details

For each quote section this group will display the quote section details plus quote areas like supplies, labours, etc...

«GroupStart:SectionDetails»
Section Content Goes Here - Will Be Repeated Per Quote Section
«GroupEnd:SectionDetails»

* A description of Section Summary details, see: **Quotation Section Additional Tables, Section Detail.**

Section Note

Note is intended to be displayed in a table only on Quotes, The document generator will look for the markers in a table to be used as the start and end of the Note row.

«TableStart:SectionNote»		«TableEnd:SectionNote»

* A description of Section Note details, see: **Quotation Section Additional Tables, Section Note**
** Section Note only apply inside of Section Detail, **see Section Details**

Section Attachment

Attachment is intended to be displayed in a table only on Quotes, The document generator will look for the markers in a table to be used as the start and end of the Attachment row.

«TableStart:SectionAttachment»		«TableEnd:SectionAttachment»

* A description of Section Attachment details, see **Quotation Section Additional Tables, Section Attachment**
** Section Attachments only exist inside of Section Detail, **see Section Details**

Section Inclusion

Inclusions are intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Inclusion row.

«TableStart:SectionInclusion»		«TableEnd:SectionInclusion»

* A description of Section Inclusion details, see: **Quotation Section Additional Tables, Section Inclusion**

** Section Note only apply inside of Section Detail, **see Section Details**

Section Exclusion

Exclusions are intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Exclusion row.

«TableStart:SectionExclusion»		«TableEnd:SectionExclusion»

* A description of Section Exclusion details, see: **Quotation Section Additional Tables, Section Exclusion**

** Section Note only apply inside of Section Detail, **see Section Details**

Section Assumption

Assumptions are intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Assumption row.

«TableStart:SectionAssumption»		«TableEnd:SectionAssumption»

* A description of Section Assumption details, see: **Quotation Section Additional Tables, Section Assumption**

** Section Note only apply inside of Section Detail, **see Section Details**

Quotation Stage Tables

The following section is only required when the Parent Quote of a Stage is a Section. If the Parent Quote does not have a parent itself, the standard Section tables can be used.

Stage Details

For each quote stage this group will display the quote stage details plus quote areas like supplies, labours, etc...

«GroupStart:StageDetails»
Stage Content Goes Here - Will Be Repeated Per Quote Stage
«GroupEnd:StageDetails»

* A description of Stage Summary details, see: **Quotation Stage Additional Tables, Section Detail.**

Job Tables

Check Ins

Check Ins is intended to be displayed in a table only on Jobs. The document generator will look for the markers in a table to be used as the start and end of the Check Ins row.

«TableStart:CheckIn»		«TableEnd:CheckIn»

* A description of Purchase Order Line details, see: **Job Additional Tables – Check Ins.**

Notes

Notes is intended to be displayed in a table only on Jobs. The document generator will look for the markers in a table to be used as the start and end of the Notes row.

«TableStart:Note»		«TableEnd:Note»

* A description of Purchase Order Line details, see: **Job Additional Tables – Notes.**

Attachments

Attachment is intended to be displayed in a table on both Jobs and RFI. The document generator will look for the markers in a table to be used as the start and end of the Attachment row.

«TableStart:Attachment»		«TableEnd:Attachment»

* A description of Attachment details, see: **Job Additional Tables – Attachments.**

Note: The TableStart fields will not be visible in the generated document.

Timesheet

Timesheet is intended to be displayed in a table only on Jobs. The document generator will look for the markers in a table to be used as the start and end of the Timesheet row.

«TableStart:Timesheet»		«TableEnd:Timesheet»

* A description of Attachment details, see: **Job Additional Tables – Timesheet Fields.**

Note: The TableStart /TableEnd fields will not be visible in the generated document.

Invoice Tables

Current Claim Listing

Current Claim is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Current Claim row.

«TableStart:CurrentClaim»		«TableEnd:CurrentClaim»

***A** description of Current Claim details, see:* **Invoice Additional Tables – Current Claim**

Previous Claim Listing

Current Claim is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Current Claim row.

«TableStart:PreviousClaim»		«TableEnd:PreviousClaim»

***A** description of Previous Claim details, see here:* **Invoice Additional Tables – Previous Claim**

***Note:** The TableStart fields will not be visible in the generated document.*

Current Variation Claim Listing

Current Variation Claim is intended to be displayed in a table. The document generator will look for the markers in a table to be used as the start and end of the Current Variation Claim row.

«TableStart:CurrentVariationClaim»		«TableEnd: CurrentVariationClaim »

***A** description of Current Variation Claim details, see:* **Invoice Additional Tables – Current Variation Claim**

Purchase Order Tables

Purchase Order Line Listing

Purchase Order Lines are intended to be displayed in a table only on Purchase Order. The document generator will look for the markers in a table to be used as the start and end of the Purchase Order Line row.

«TableStart:PurchaseOrderLine»«PartNumber»		«LineTotal»«TableEnd:PurchaseOrderLine»

* A description of Purchase Order Line details, see: **Purchase Order Additional Tables – Purchase Order Lines.**

Note: *The TableStart / TableEnd fields will not be visible in the generated document.*

Schedule Tables

Schedule Details

Schedule details is intended to be displayed in a table only on Schedule. The document generator will look for the markers in a table to be used as the start and end of the schedule details row.

«TableStart:SchedulerDetails»		«TableEnd:SchedulerDetails»

* A description of Attachment details, see: **Scheduler Additional Table – Scheduler Details**

Note: *The TableStart / TableEnd fields will not be visible in the generated document.*

RFI Tables

Attachments

Attachment is intended to be displayed in a table on both Jobs and RFI. The document generator will look for the markers in a table to be used as the start and end of the Attachment row.

«TableStart:Attachment»		«TableEnd:Attachment»

* A description of Attachment details, see: **RFI Additional Tables – Attachments.**

Note: The TableStart fields will not be visible in the generated document.

Company Detail Fields

Company Header Fields*

Company Information	
CompanyName	Trading Name of the Company
CompanyLegalName	Legal Name of the Company
CompanyPhone	Phone for the Company
CompanyFax	Fax of the Company
CompanyEmail	Email address for the Company
CompanyWebsite	Website for the Company
CompanyStreetLine1	Address Line 1 of the Physical Company Address
CompanyStreetLine2	Physical Suburb, State and Postcode of the Company
CompanyPostalLine1	Address Line 1 of the Postal Company Address
CompanyPostalLine2	Postal Suburb, State and Postcode of the Company
CompanyReg1	Registration Number 1 for the Company
CompanyReg1Name	Registration Name 1 for the Company
CompanyReg2	Registration Number 2 for the Company
CompanyReg2Name	Registration Name 2 for the Company
CompanyReg3	Registration Number 3 for the Company
CompanyReg3Name	Registration Name 3 for the Company
BankAccountName	Bank Account Name for the Company
BankAccountBSB	Bank Account BSB for the Company
BankAccountNumber	Bank Account Number for the Company
ExtraInvoiceText	Additional text to be displayed on the Invoice
TaxName	Tax Name

*you can include those field at:

- **Quotation, Job, Invoice, Purchase Order** and **Scheduler.**

- Site Customer Info, see: **Site Customer Fields.**

- Billing Customer Info, see: **Billing Customer Fields.**

Assigned User Detail Fields

Assigned User Header Fields*

Company Information	
AssignedUserName	Assigned User Full Name
AssignedUserFirstName	Assigned User First Name
AssignedUserLastName	Assigned User Last Name
AssignedUserJobTitle	Assigned User Job Title
AssignedUserTeam	Assigned User Team
AssignedUserMobile	Assigned User Mobile
AssignedUserEmail	Assigned User Email

*you can also those fields at:

   - **Quotation, Job, Invoice, Purchase Order, Scheduler** and **Scheduler Details.**

** There are some exceptions on how we get Assigned User info at:

   - Purchase Order will come from the Job associated to the Purchase Order.

   - Invoice will come from the Job associated to the Invoice.

   - Scheduler comes from the user is scheduled to the Job or Quote.

   - Scheduler Details comes from the user assigned to the Job or Quote.

Quotation Detail Fields

Quote Header Fields need to be covered between the merge fields «GroupStart:Quote» to «GroupEnd:Quote» to be displayed, more info see: **Preparing the Document**

Quote Header Fields*

Quote Information	
QuoteNo	Number assigned to the Quotation
QuoteName	Quotation Name
ClientOrderNumber	Entered Client Order Number on the Quote
PurchaseOrderNumber	Entered Purchase Order Number on the Quote
CareOfBillingName	Care of Name from the Quote Billing Customer
QuoteDescription	Quotation Description
QuoteDate	Date associated with the Quotation
QuoteSignedDate	Quote Signed Date
ValidUntilDate	Date to which the Quotation is valid
DueDate	Due Date of the Quotation
QuoteAddressLine1	Address Line 1 of the Quote Details
QuoteAddressLine2	Address Line 2 of the Quote Details
QuoteAddressLine3	Suburb, state and postcode of the Quote Details
QuoteAddressPostcode	Postcode of the Quote Details
QuoteAddressState	State of the Quote Details
QuoteAddressSuburb	Suburb of the Quote Details
QuoteTotalExTax	Total value of the Quotation excluding Tax
QuoteTax	Total value of Tax on the Quotation
QuoteTotalIncTax	Total value of the Quotation including Tax
QuoteCreatedDate	Date When was created the Quote
DiscountExTax	Discount Giving to the Quote
DiscountIncTax	Discount Include Tax Giving to the Quote
TotalLabourValueExTax	Total Labour Values excluding tax
TotalLabourValueIncTax	Total Labour Values including tax

TotalLabourCost	Total Labour Cost
TotalCallOutFeeExTax	Total Call Out Fee Excluding Tax
TotalCallOutFeeIncTax	Total Call Out Fee Including Tax
TotalCallOutIncludedMinutes	Total amount of Minutes Included with the Call Outs
TotalSuppliesValueExTax	Total Supply Value Excluding Tax
TotalSuppliesValueIncTax	Total Supply Value Including Tax
TotalSuppliesCost	Total Supplies Cost
TotalSuppliesQuantity	Total Supplies Quantity
TotalLabourSupplyValueExTax	Total Labour and Supply Value Excluding Tax
TotalLabourSupplyValueIncTax	Total Labour and Supply Value Including Tax
TotalLabourSupplyCost	Total Labour and Supply Cost
TotalLabourNoCallOutExTax	Total Labour without Call Outs Excluding Tax
TotalLabourNoCallOutIncTax	Total Labour without Call Outs Including Tax
TotalExTaxOptionalSupply	Total Exclude Tax of optional supply items
TotalTaxOptionalSupply	Total Tax of optional supply items
TotalIncTaxOptionalSupply	Total Include tax of optional supply items
TotalCallOutFeeExTax	Total Callout Fees excluding Tax
QuoteSignedDate	Date on which the Quotation was signed
SignedOffBy	Name of the party who signed off on the Quotation.
JobNumber	Associate Job Number
JobName	Associate JobName
JobCompleted	Associated Job Completed Date
AssociatedJobType	Associate Job Type
JobDescription	Associate Job Description
JobCreatedOn	Associate Job Created Date
JobAddressLine1	Associate Job Address Line1
JobAddressLine2	Associate Job Address Line2
JobSuburb	Associate Job Suburb

JobState	Associate Job State
JobPostcode	Associate Job Postcode
JobCountry	Associate Job Country
JobLatitude	Associate Job Latitude
JobLongitude	Associate Job Longitude

* you can also include

- Company details, see: **Company Detail Fields.**

- Site customer info, see: **Site Customer Fields.**

- Billing customer info, see: **Billing Customer Fields.**

- Assigned user info, see **Assigned User Fields**.

- General Tables, see: **General Additional Tables.**

- Quote tables, see: **Quote Additional Tables.**

Job Detail Fields

Job Header Fields need to be covered between the merge fields «GroupStart:Job» to «GroupEnd:Job» to be displayed, more info see: **Preparing the Document**

Job Header Fields*

Job Information	
JobNumber	Number Assigned to the Job
SectionNo	Job Section Number
JobName	Name assigned to the Job
JobDescription	A description of the Job
Priority	A Priority of the Job
ParentJobName	Parent Job Name if one exists
ClientOrderNumber	A job Client Order Number
PurchaseOrderNumber	A job Purchase Order Number
WorkUndertaken	A work undertaken in a job
JobType	A Job Type Description
PaymentTerm	Payment Term Associate to Billing Customer
SignedOffBy	A job signed off by
CreatedOn	Date on created a job
JobCompleted	Date on which the job was completed
TotalAmountExTax	A total amount job value excluding tax
TotalTax	A total tax value of a job
TotalAmountIncTax	A total amount of job value include tax
TotalSuppliesCharge	A total amount of job supplies include tax
TotalSuppliesValueExTax	Total Supplies Value Excluding Tax
TotalSuppliesValueIncTax	Total Supplies Value Including Tax
TotalSuppliesQuantity	Total Supplies Quantity
TotalLabourCharge	A total amount of job labour include tax
TotalLabourValueExTax	Total Labour Value Excluding Tax
TotalLabourValueIncTax	Total Labour Value Including Tax
TotalCallOutFeeExTax	Total Callout Fees excluding Tax
TotalCallOutFeeIncTax	Total Callout Fees Including Tax

`TotalCallOutIncludedMinutes`	Total Callout included Minutes
`TotalLabourNoCallOutExTax`	Total Labour without Callout Excluding Tax
`TotalLabourNoCallOutIncTax`	Total Labour without Callout Including Tax
`TotalLabourSupplyValueExTax`	Total Labour and Supply Value Excluding Tax
`TotalLabourSupplyValueIncTax`	Total Labour and Supply Value Including Tax
`TotalHours`	A total amount of job labour hours
`TotalTimesCost`	A total amount of cost on job labour
`TimeLogged`	Date on which the job was logged
`TimeResponded`	Date on which the job was responded
`ExpectedTime`	Expected time of the job booking details
`EstimatedDuration`	Estimate duration of the job booking details
`ReattendanceRequired`	Reattendance Required of the job booking details
`ExpectedDate`	Expected time of the job booking details
`JobNumberTitleTranslation`	A translation of a single job title
`ClientOrderNumberTitleTranslation`	A translation of a client order number title
`PurchaseOrderNumberTitleTranslation`	A translation of a purchase order number title
`JobSingleTranslation`	A translation of a single job title
`SiteCustomerTitleTranslation`	A translation of a site customer title
`BillingCustomerTitleTranslation`	A translation of a billing customer title
`WorkUndertakenTranslation`	A translation of a work undertaken title
`SupplyPluralTranslation`	A translation of a plural supply tittle
`EquipmentSingleTranslation`	A translation of a single equipment title
`EquipmentPluralTranslation`	A translation of a plural equipment title
`JobAddressLine1`	Job Address
`JobAddressLine2`	Secondary Job Address
`JobAddressLine3`	Job Address plus suburb, state and postcode
`JobSuburb`	Job Suburb
`JobState`	Job State
`JobPostcode`	Job Postcode
`JobCountry`	Job Country
`JobLatitude`	Job Latitude

JobLongitude	Job Longitude

* you can also include:

     - Company details, see: **Company Detail Fields.**

     - Site customer info, see: **Site Customer Fields.**

     - Billing customer info, see: **Billing Customer Fields.**

     - Assigned user info, see **Assigned User Fields.**

     - General Tables, see: **General Additional Tables.**

     - Job tables, see: **Job Additional Tables.**

Invoice Detail Fields

Invoice Header Fields need to be covered between the merge fields «GroupStart:Invoice» to «GroupEnd:Invoice» to be displayed, more info see: **Preparing the Document**

Invoice Header Fields*

Invoice Information	
InvoiceNo	Invoice Number assigned
InvoiceDate	Invoice Date associated
DueDate	Invoice Date on which is due
ClientOrderNumber	Invoice Client Order Number
PurchaseOrderNumber	Invoice Purchase Order Number
WorkUndertaken	Invoice Work Undertaken
CareOfBillingName	Care of Name from the Invoice Billing Customer
TotalSuppliesValueExTax	Invoice Total value of Supplies excluding Tax
TotalSuppliesValueIncTax	Invoice Total value of Supplies including Tax
TotalSuppliesCharge	A total amount of Invoice supplies excluding the tax
TotalSuppliesQuantity	Invoice Sum of all Supply Quantities
TotalLabourValueIncTax	Invoice Total value of Labour excluding Tax
TotalLabourValueExTax	Invoice Total value of Labour including Tax
TotalLabourCharge	A total amount of invoice labour excluding the tax
TotalLabourHours	Invoice Total Labour Hours
TotalCallOutFeeExTax	Invoice Total fee of Callouts excluding Tax
TotalCallOutFeeIncTax	Invoice Total fee of Callouts including Tax
TotalCallOutIncludedMinutes	Total amount of included Invoice Callout Minutes

TotalLabourNoCallOutExTax	Invoice Total value of Labour (excluding Callouts and Tax)
TotalLabourNoCallOutIncTax	Invoice Total value of Labour (excluding Callouts and including Tax)
TotalLabourSupplyValueExTax	Invoice Total value of both Labour and Supplies excluding tax
TotalLabourSupplyValueIncTax	Invoice Total value of both Labour and Supplies including tax
Discount	Invoice Value of level discount given
TotalAmountExTax	Invoice Total value of the excluding Tax
TotalTax	Invoice Total value of Tax
TotalIncTax	Invoice Total value including Tax
TotalCallOutFeeExTax	Total Callout Fees excluding Tax
TotalPayments	Invoice Total payments received to date
TotalCreditCardSurcharge	Value of credit card surcharge applied from payments
TotalDue	Invoice Current balance due on
SignedOffStatement	Configured Sign-off Statement
SignedOffBy	Name of the Signed Off
Signature	Placement for the Signature Image (Must be placed into the Title of the inserted image)
EquipmentName	Translation given to "*Equipment*"
SuppliesName	Translation given to "*Supply*"
ClientOrderNumberName	Translation given to *"Client Order Number"*
PaymentTerm	Name of the *Payment Terms*
PurchaseOrderNumberName	Translation given to *"Purchase Order Number"*

QuoteNumber	Quote Number of the related Quotation
QuoteName	Quote Name of the related Quotation
JobNumber	Job Number related to the Invoice
JobName	Job Name related to the Invoice
JobNumberName	Translation given to Job Number
JobCompleted	Date on which the Job was completed
JobType	Job Type related to the Invoice
JobDescription	Job Description related to the Invoice
JobCreatedOn	Job created date related to the Invoice
TimeLogged	Job Time Logged related to the Invoice
TimeResponded	Job Time Responded related to the Invoice
LastCheckOutDate	Last check out date of when the job was completed
LastCheckOutTime	Last check out time of when the job was completed
JobAddressLine1	Job Address Line 1 related to the Invoice
JobAddressLine2	Job Address Line 2 related to the Invoice
JobAddressLine3	Job Address Line 3 related to the Invoice
JobSuburb	Job Suburb related to the Invoice
JobState	Job State related to the Invoice
JobPostcode	Job Postcode related to the Invoice
JobCountry	Job Country related to the Invoice
ClaimName	Invoice Claim Name

ClaimNumber	Claim Number
ClaimPurchaseOrderNumber	Claim Purchase Order Number
ClaimTotalValueContractIncTax	Claim total contract value including tax
ClaimTotalValueContractExTax	Claim total contract value excluding tax
ClaimTotalValueExTax	Claim total value excluding tax
ClaimTotalValueIncTax	Claim total value including tax
ClaimTotalValueToDateExTax	Claim total value to date excluding tax
ClaimTotalValueToDateIncTax	Claim total value to date including tax
ClaimTotalPercentIncTax	Claim total percentage including tax
ClaimTotalPercentToDateExTax	Claim total percentage to date excluding tax
ClaimTotalBalanceRemainingIncTax	Claim total balance remaining including tax
ClaimTotalBalanceRemainingExTax	Claim total balance remaining excluding tax
ClaimTotalRetentionIncTaxValue	Claim Total Retention Inc Tax Value
ClaimTotalRetentionAmountExTaxValue	Claim Total Retention Amount Ex Tax Value
PreviousClaimTotalExTax	Previous claims total including tax
PreviousClaimTotalIncTax	Previous claims total including tax
PreviousClaimWithoutVariationTotalExTax	Previous Claim total without variation excluding tax
PreviousClaimWithoutVariationTotalIncTax	Previous Claim total without variation including tax
PreviousVariationClaimTotalExTax	Previous Variation Claim total excluding tax
PreviousVariationClaimTotalIncTax	Previous Variation Claim total including tax
PreviousClaimTotalPaid	Previous claim total paid

PreviousClaimTotalBalance	Previous claim total balance including tax
PreviousClaimTotalRetentionIncTaxValue	Previous claims total rentention inc tax value
PreviousClaimTotalRetentionAmountExTaxValue	Previous claims total retention amount ex tax value
RetentionAmountExTax	Retention total value excluding tax
RetentionIncTax	Retention total value including tax
RetentionRemaining	Retention Remaining
TotalLessRetentionExTax	Total Less Retention Remaining Ex Tax
TotalLessRetentionTax	Total Less Retention Remaining Tax
TotalLessRetentionIncTax	Total Less Retention Remaining Inc Tax
ClaimTotalVariationExTax	Claim Total Variation Ex Tax
ClaimTotalVariationIncTax	Claim Total Variation Inc Tax
ClaimTotalVariationToDateExTax	Claim Total Variation to Date Ex Tax
ClaimTotalVariationToDateIncTax	Claim Total Variation to Date Inc Tax
VariationTotalBalanceRemainingExTax	Variation Total Balance Remaining Ex Tax
VariationTotalBalanceRemainingIncTax	Variation Total Balance Remaining Inc Tax
ClaimTotalVariationValueExTax	Claim Total Variation Value Ex Tax
ClaimTotalVariationValueIncTax	Claim Total Variation Value Inc Tax
ClaimTotalWithoutVariationExTax	Claim Total Without Variation Ex Tax
ClaimTotalWithoutVariationIncTax	Claim Total Without Variation Inc Tax
TotalValueWithoutVariationExTax	Total Value Without Variation Ex Tax (for the current claim)

`TotalValueWithoutVariationIncTax`	Total Value Without Variation Inc Tax
`TotalValueClaimedToDateWithoutVariationExTax`	Total Value Claimed to Date Without Variation Ex Tax
`TotalValueClaimedToDateWithoutVariationIncTax`	Total Value Claimed to Date Without Variation Inc Tax
`BalanceRemainingExTaxWithoutVariation`	Balance Remaining Ex Tax Without Variation
`BalanceRemainingIncTaxWithoutVariation`	Balance Remaining Inc Tax Without Variation
`TotalDueExclusiveTax`	Total Due Exclusive Tax
`TotalTaxOnPayment`	Total Tax on Payment
`ClaimTotalLessRetentionExTax`	Claim Total Less Retention Ex Tax
`ClaimTotalLessRetentionTax`	Claim Total Less Retention Tax
`ClaimTotalLessRetentionIncTax`	Claim Total Less Retention Inc Tax
`TotalBalanceDueLessRetentionExTax`	Total Balance Due Less Retention Ex Tax
`TotalBalanceDueLessRetentionIncTax`	Total Balance Due Less Retention Inc Tax
`PreviousClaimTotalLessRetentionExTax`	Previous Claim Total Less Retention Ex Tax
`PreviousClaimTotalLessRetentionTax`	Previous Claim Total Less Retention Tax
`PreviousClaimTotalLessRetentionIncTax`	Previous Claim Total Less Retention Inc Tax
`VariationTotalLessRetentionExTax`	Variation Total Less Retention Ex Tax
`VariationTotalLessRetentionIncTax`	Variation Total Less Retention Inc Tax
`VariationTotalLessRetentionTax`	Variation Total Less Retention Tax
`ClaimTotalLessRetentionWithoutVariationExTax`	Claim Total Less Retention Without Variation Ex Tax
`ClaimTotalLessRetentionWithoutVariationIncTax`	Claim Total Less Retention Without Variation Inc Tax
`ClaimTotalLessRetentionWithoutVariationTax`	Claim Total Less Retention Without Variation Tax

* you can also include
- Company details, see: **Company Detail Fields.**
- Site customer info, see: **Site Customer Fields.**
- Billing customer info, see: **Billing Customer Fields.**
- Assigned user info, see **Assigned User Fields.**
- General Tables, see: **General Additional Tables.**
- Invoice tables, see: **Invoice Additional Tables.**

Purchase Order Detail Fields

Purchase Order Header Fields need to be covered between the merge fields «GroupStart:PurchaseOrder» to «GroupEnd:PurchaseOrder» to be displayed, more info see: **Preparing the Document**

Purchase Order Header Fields*

Purchase Order Information	
PurchaseOrderNumber	Number assigned to the Purchase Order
PurchaseOrderDateSent	Date on which the Purchase Order was sent
PurchaseOrderDateRequired	Date on which the Purchase Order is required
TimeRequired	Time on which the Purchase Order is required
PurchaseOrderReference	A purchase Order Reference
PurchaseOrderOrderedBy	Person who order the Purchase Order
PurchaseOrderDeliverTo	Type of Purchase Order, Yard, Site, or Pickup
PurchaseOrderNotes	Purchase Order Notes
PurchaseOrderInstructions	Purchase Order Instructions
PurchaseOrderInstructions	Purchase Order Instructions
TotalAmountExTax	Purchase Order Subtotal
TotalTax	Purchase Order Tax
TotalAmountIncTax	Purchase Order Total Amount
TotalClaimedIncTax	Total Claimed on Supplier Invoices
PurchaseOrderSubTotal	Alias for TotalAmountExTax
PurchaseOrderTax	Alias for TotalTax
PurchaseOrderTotal	Alias for TotalAmountIncTax
DeliveryAddressLine1	Job address if the Purchase Order delivery is to Site, Trading name of the company if is Yard Otherwise "Will Pickup"
DeliveryAddressLine2	Job Suburb, Postcode and State if PO is Site, Company Address if is Yard, blank if is Pickup
DeliveryAddressLine3	Company Suburb, Postcode and State if Purchase Order Delivery is Yard
JobNumber	Job number associate to purchase order
JobName	Job name associate to purchase order
JobCompleted	Job completed date associate to purchase order

JobType	Job type associate to purchase order
JobDescription	Job description associate to purchase order
JobCreatedOn	Job created on associate to purchase order
SupplierName	Supplier Full Name associate to Purchase Order
SupplierPhone	Phone number of the Supplier of the Purchase Order
SupplierFax	Fax of the Supplier of the Purchase Order
SupplierBN	Supplier Business Number
SupplierFirstName	Supplier First Name
SupplierLastName	Supplier Last Name
SupplierMobile	Supplier Mobile
SupplierEmail	Supplier Email
SupplierWebsite	Supplier Website
SupplierNotes	Supplier Notes
SupplierStreetLine1	Supplier Street Address Line 1
SupplierStreetLine2	Supplier Street Address Line 2
SupplierStreetLine3	Supplier Street Suburb, Postcode and State
SupplierPostalLine1	Supplier Post Address Line 1
SupplierPostalLine2	Supplier Post Address Line 2
SupplierPostalLine3	Suppler Post Suburb, Postcode and State

* you can also include:

- Company details, see: **Company Detail Fields.**

- Site customer info, see: **Site Customer Fields.**

- Billing customer info, see: **Billing Customer Fields.**

- Assigned user info, see **Assigned User Fields.**

- Purchase Order details, see: **Purchase Order Additional Tables.**

Scheduler Detail Fields

Scheduler Header Fields need to be covered between the merge fields «GroupStart: Scheduler» to «GroupEnd: Scheduler» to be displayed, more info see: **Preparing the Document**

Scheduler Header Fields*

Scheduler Information	
SchedulerStartDate	Start Date selected on the scheduler
SchedulerStartMonth	Start Date selected on the scheduler formatted with month date as name.
SchedulerEndDate	End Date selected on the scheduler
SchedulerEndMonth	End Date selected on the scheduler formatted with month date as name.
ClientOrderNumber	Scheduler Client Order Number
PurchaseOrderNumber	Scheduler Purchase Order Number

* You can also include:

- Company details, see: **Company Detail Fields.**

- Site customer info, see: **Site Customer Fields.**

- Billing customer info, see: **Billing Customer Fields.**

- Assigned user details, see **Assigned User Fields.**

- Scheduler details, see: **Scheduler Detail Additional Tables.**

Customer Detail Fields

Site Customer Fields*

Site Customer	
SiteCustomerNo	Site Customer Number
SiteCustomerFirstName	Site Customer First Name
SiteCustomerLastName	Site Customer Last Name
SiteCustomerName	Site Customer Company Name if one is entered, otherwise Site Customer First and Last Name
SiteCustomerNotes	Site Customer Notes
SiteCustomerSiteNotes	Site Customer Site Notes
SiteCustomerBN	Site Customer Business number
SiteCustomerPhone	Site Customer **Phone or Partner's Phone
SiteCustomerMobile	Site Customer **Mobile Number
SiteCustomerFax	Site Customer **Fax Number
SiteCustomerEmail	Site Customer **Email Address
SiteAddressLine1	Site Customer Address Line 1
SiteAddressLine2	Site Customer **Address Line 2
SitePlainAddressLine2	Site Customer Address Line 2
SiteAddressLine3	Site Customer **Suburb, State and Postcode
SiteAddressSuburb	Site Customer Suburb
SiteAddressPostcode	Site Customer Postcode
SiteAddressState	Site Customer Address
SiteAddressCountry	Site Customer Country
SiteContactFirstName	First Name of the Site Contact on the Job / Quotation if one is selected, otherwise the Contact First Name of the Site Customer
SiteContactFullName	Full name of the Site Contact on the Job / Quotation if one is selected, otherwise the Contact First and Last Name of the Billing Customer
SiteContactMobile	Site Contact Mobile Number
SiteContactPhone	Site Contact Phone Number
SiteContactEmail	Site Contact Email
SiteContactFax	Site Contact Fax
SiteContactRole	Site Contact Role

Site Customer 2	
SiteCustomer2FullName	Combines both the First Name and Last Name of the Second associated Site Customer
SiteCustomer2FirstName	Site Customer Second First Name
SiteCustomer2LastName	Site Customer Second Last Name
SiteCustomer2Phone	Site Customer Second Phone Number
SiteCustomer2Mobile	Site Customer Second Mobile Number
SiteCustomer2Email	Site Customer Second Email

*you can also include those fields at

- **Quotation, Job, Invoice, Purchase Order, Scheduler** and **Scheduler Details.**

** info from Site Contact on the Job / Quotation / Invoice if one is selected and has info entered, otherwise the info of the Site Customer.

** If SiteAddressLine2 is empty, that will be replace by the info of SiteAddressLine3, then the field SiteAddressLine3 will be removed

Billing Customer	
BillingCustomerNo	`Billing` Customer Number.
BillingCustomerName	`Billing` Customer Company Name if one is entered, otherwise `Billing` Customer First and Last Name.
BillingCustomerFirstName	Billing Customer FirstName
BillingCustomerLastName	Billing Customer Last Name
BillingCustomerNotes	`Billing` Customer Notes.
BillingCustomerSiteNotes	`Billing` Customer Site Notes.
BillingCustomerBN	`Billing` Customer Business number.
BillingCustomerPhone	`Billing` Customer Phone or Partner's Phone.
BillingCustomerMobile	`Billing` Customer **Mobile Number.
BillingCustomerFax	`Billing` Customer **Fax Number.
BillingCustomerEmail	`Billing` Customer **Email Address.
BillingAddressLine1	`Billing` Customer Address Line 1.
BillingAddressLine2	`Billing` Customer ***Address Line 2.
BillingPlainAddressLine2	`Billing` Customer Address Line 2.
BillingAddressLine3	`Billing` Customer ***Suburb, State and Postcode.
BillingAddressSuburb	`Billing` Customer Suburb.
BillingAddressPostcode	`Billing` Customer Postcode.
BillingAddressState	`Billing` Customer Address.
BillingAddressCountry	`Billing` Customer Country.
BillingContactFirstName	First Name of the `Billing` Contact on the Job / Quotation if one is selected, otherwise the Contact First Name of the `Billing` Customer.
BillingContactFullName	Full name of the `Billing` Contact on the Job / Quotation if one is selected, otherwise the Contact First and Last Name of the Billing Customer.
BillingContactMobile	`Billing` Contact Mobile Number.
BillingContactPhone	`Billing` Contact Phone Number.
BillingContactEmail	`Billing` Contact Email.
BillingContactFax	`Billing` Contact Fax.
BillingContactRole	`Billing` Contact Role.

Billing Customer 2	
BillingCustomer2FullName	Combines both the First Name and Last Name of the Second associated Site Customer
BillingCustomer2FirstName	Billing Customer Second First Name
BillingCustomer2LastName	Billing Customer Second Last Name
BillingCustomer2Phone	Billing Customer Second Phone Number
BillingCustomer2Mobile	Billing Customer Second Mobile Number
BillingCustomer2Email	Billing Customer Second Email

Billing Customer Fields*

* you can also include

- **Quotation, Job, Invoice, Purchase Order, Scheduler** and **Scheduler Details.**

** info from Billing Contact on the Job / Quotation / Invoice if one is selected and has info entered, otherwise the info of the Billing Customer**.**

*** when BillingAddressLine2 is empty, BillingSmartAddressLine2 will be replace by the info of SiteAddressLine3, then the field SiteAddressLine3 will be removed

RFI Detail Fields

RFI Header Fields need to be covered between the merge fields
«GroupStart:RequestForInformation» to «GroupEnd:RequestForInformation» to be displayed,
more info see: **Preparing the Document**

RFI Header Fields*

RFI Information	
Title	Title of the RFI
RFINumber	Unique number of RFI
Location	Location associated to RFI
Specification	RFI Specifications
Status	Status of RFI
Query	Query associated to RFI
ProposedSolution	Solution proposed to RFI
ContractorResponse	Main Contractor Response of RFI
RFIDate	Created Date of RFI
DateSent	Date when RFI was sent
DueBack	Due Date of RFI
DateReceived	Received Date of RFI
CostImpact	Cost Impact of RFI
RFIContact	RFI Contact
JobNumber	Job Number related to the RFI
JobName	Job Name related to the RFI
CompletedDate	Date on which the Job was completed
TotalAmountExTax	Total amount of job excluding Job
TotalAmountIncTax	Total amount of job including Job
TotalTax	Total Tax on Job
JobType	Job Type related to the RFI
JobDescription	Job Description related to the RFI

ClientOrderNumber	Client Order Number of Job
PurchaseOrderNumber	Purchase Order Number of Job
WorkUndertaken	Work Undertaken of the Job
CreatedOn	Job created date related to the RFI
TimeLogged	Job Time Logged related to the RFI
TimeResponded	Job Time Responded related to the RFI
LastCheckOutDate	Last check out date of when the job was completed
LastCheckOutTime	Last check out time of when the job was completed
JobAddressLine1	Job Address Line 1 related to the RFI
JobAddressLine2	Job Address Line 2 related to the RFI
JobAddressLine3	Job Address Line 3 related to the RFI
JobSuburb	Job Suburb related to the RFI
JobState	Job State related to the RFI
JobPostcode	Job Postcode related to the RFI
JobCountry	Job Country related to the RFI

* you can also include
        - Company details, see: **Company Detail Fields.**
        - Site customer info, see: **Site Customer Fields.**
        - Billing customer info, see: **Billing Customer Fields.**

General Additional Tables

The following **General Tables** works with **Quotes, Jobs** and **Invoice** header covered them, more info see: **Preparing the Document**

Labour Fields*

Labour	
Description	Labour Role Description
Hours	Hours charged
HourlyRateExTax	Hourly Rate for the Labour excluding tax
HourlyRateIncTax	Hourly Rate for the Labour inclusive of tax
AccountIncomeCode	Income Account Code
Notes	Labour Description
RoleName	Labour Role
FirstName**	First Name of the User associated with the Labour charge
LastName**	Last Name of the User associated with the Labour charge
FullName**	First and Last Name associated with the Labour charge
Date**	Date when was added Labour
LabourTotalAmountExTax	Line Total for the Labour excluding tax
Tax	Line Total tax for the labour
LabourTotalAmountIncTax	Line Total for the Labour inclusive of tax
Activity***	Displays the Activity name for the Labour

* Only applies to **Quotes, Jobs, and Invoice**, more info see: **General Tables**
** Those fields only apply to **Jobs** and **Invoices**
*** Only applies to Stages

Supply Fields*

Supply	
PartNumber	Part Number field
Description	Description field
Annotation	Entered Annotation against the Supply

Quantity	Quantity of the Supply on the Quotation
UOM	Unit of measurement
Category	Supply category
AccountIncomeCode	Income Account Code
SupplyImage	Image associated with the Supply.
DisplayOrder	Order in which the item will be displayed.
DateAdded	Date when supply was added
SupplierName	Supplier Name
UnitPriceExTax	Unit Price of the Supply excluding tax
UnitPriceIncTax	Unit Price of the Supply inclusive of tax
SupplyTotalAmountExTax	Line Total for the Supply excluding tax
Tax	Line Total Tax for the Supply
SupplyTotalAmountIncTax	Line Total for the Supply inclusive of tax

* Only applies to **Quotes, Jobs, and Invoice**, more info see: **General Tables**

CallOutFee Fields*

CallOutFee	
Name	Name of the Callout Fee
AmountExTax	Line Total of the Callout Fee excluding tax
Tax	Line Total Tax of the Callout Fee
AmountIncTax	Line Total of the Callout Fee including tax

* Only applies to **Quotes, Jobs, and Invoice**, more info see: **General Tables**

Equipment Fields*

Equipment	
Number	Number field from the Equipment
Name	Name field from the Equipment
Make	Make field from the Equipment
Model	Model field from the Equipment
SerialNumber	Serial Number field from the Equipment
Supplier	Supplier field from the Equipment
InstallationDate	Installation Date field from the Equipment

CommissionDate	Commission Date field from the Equipment
WarrantyExpiry	Warranty Expiry field from the Equipment
ServicePeriodStart	Service Period Start field from the Equipment
ServicePeriodEnd	Service Period End field from the Equipment
Location	Place set the Equipment
TestComments	Test Comments
TestResult **	Test Status "Pass" "Fail" or empty.
TestedBy **	User who test the Equipment
TestedOn **	Tested Date Field
ServiceInterval **	Service Interval from the Equipment.
EquipmentType **	Equipment Type.
EquipmentTypeId **	Auto numeric Equipment Type.
LastServiceDate	Equipment Last Service Date
NextServiceDate	Equipment Next Service Date
Barcode	Equipment Barcode
Notes	Equipment Notes
EquipmentCustomFields	Copy all custom fields for Equipment Custom fields (Custom Field Name: Custom Field Value).
QuoteJobEquipmentCustomFields	Copy all custom fields for Job / Quote Equipment Custom fields (Custom Field Name: Custom Field Value).

* Only applies to **Quotes, Jobs, and Invoice**, more info see: **General Tables**
** only apply for **Jobs**

Annotation Fields*

Annotation	
Annotation	Supply Annotation Field

* Only applies to **Quotes, Jobs, and Invoice**, more info see: **General Tables**

Booking Fields*

Bookings

BookingDate	Date of booking
StartTime	Time booking start
EndTime	Time booking end
BookingNotes	Notes for this Booking
AssignedUserName	Full name user assigned to this booking
AssignedUserFirstName	First name user assigned to this booking
AssignedUserLastName	Last name user assigned to this booking
AssignedUserTeam	Team user assigned to this booking
AssignedUserJobTitle	Job Title user assigned to this booking
AssignedUserMobile	Mobile user assigned to this booking
AssignedUserEmail	Email user assigned to this booking

* Only applies to **Quotes** and **Jobs**, more info see: **General Tables**

Note Fields*

Note	
CreateOn	Date note was created
CreatedByName	User who create the note
Note	Note description

* Only applies to **Quotes** and **Jobs**, more info see: **General Tables**

Attachment Fields*

Attachment	
AttachmentImage	Date attachment was added
CreatedOn	Attachment image
Name	Filename of the Attachment

* Only applies to **Quotes** and **Jobs**, more info see: **General Tables**

Quotation Additional Tables

The following tables only work with **Quotes** header covered them, more info see: **Preparing the Document**

Progress Payment Fields*

Progress Payments	
PaymentNumber	Number of the Progress Payment
Name	Name of the Progress Payment
WhenDue	When the Progress Payment has been marked as Due
Notes	Notes against the Progress Payment
Amount	Total Value of the Progress Payment

* to see how inclusion fields are integrate on quotes, see: **Quotation tables.**

Inclusion Fields*

Inclusion	
Text	Inclusion description.

* to see how inclusion fields are integrate on quotes, see: **Quotation tables.**

Exclusion Fields*

Exclusion	
Text	Exclusion description.

* to see how exclusion fields are integrate on quotes, see: **Quotation tables.**

Assumption Fields*

Exclusion	
Text	Assumption description.

* to see how assumption fields are integrate on quotes, see: **Quotation tables.**

Optional Supply Fields*

Optional Supply	
PartNumber	Part Number field
Description	Description field

Annotation	Entered Annotation against the Supply
Quantity	Quantity of the Supply on the Quotation
UOM	Unit of measurement
Category	Supply category
AccountIncomeCode	Income Account Code
SupplyImage	Image associated with the Supply.
UnitPriceExTax	Unit Price of the Supply excluding tax
UnitPriceIncTax	Unit Price of the Supply inclusive of tax
TotalAmountExTax	Line Total for the Supply excluding tax
Tax	Line Total Tax for the Supply
TotalAmountIncTax	Line Total for the Supply inclusive of tax
DisplayOrder	Order in which the item will be displayed.

* to see how optional supplies fields are integrate on quotes, see: **Quotation tables.**

Quotation Section Additional Tables

The following tables only work with **Quotes** header covered them, more info see: **Preparing the Document**

Quote Section Fields*

Section	
SectionName	Name of the Quotation Section
SectionDescription	Full Description of the Quotation Section
SectionJobType	Job Type of the Quotation Section
SectionSubTotal	Total Value of the Quotation Section excluding Tax
SectionTax	Section Tax
SectionSubTotalIncTax	Total Value of the Quotation Section including Tax

* to see how inclusion fields are integrate on quotes, see: **Quotation Section tables – Section.**

Section Details Fields*

Section Details	
SectionNo	Section Number
SectionName	Section Name
SectionDescription	Section Quote Description
SectionJobType	Section Job Type
InheritsQuoteAddress	If the Section inherits the Parent Quote Address then "Yes" otherwise "No"
SectionAddressLine1	Section Address Line 1
SectionAddressLine2	Section **Address Line 2
SectionAddressLine3	Complied address for Section Suburb, State and Postcode
SectionAddressSuburb	Section Suburb
SectionAddressPostcode	Section Postcode
SectionAddressState	Section State
SectionAddressCountry	Section Country
SectionSubTotal	Section Amount Excluding Tax
SectionSubTotalIncTax	Section Amount Including Tax

SectionTax	Section Tax
TotalSectionSuppliesExTax	Total of the Section Supplies Excluding Tax
TotalSectionSuppliesIncTax	Total of the Section Supplies Including Tax
TotalSectionLabourExTax	Total of the Section labour Excluding Tax
TotalSectionLabourIncTax	Total of the Section labour Including Tax

* to see how inclusion fields are integrate on quote section, see: **Quotation Section tables – Section Details.**

** If SectionAddressLine2 is empty, that will be replace by the info of SectionAddressLine3, then the field SectionAddressLine3 will be removed

Section Inclusion Fields*

Inclusion	
Text	Inclusion description.

* to see how inclusion fields are integrate on quote section, see: **Quotation Section tables – Section Inclusion.**

Section Exclusion Fields*

Exclusion	
Text	Exclusion description.

* to see how exclusion fields are integrate on quotes, see: **Quotation Section tables – Section Exclusion.**

Section Assumption Fields*

Exclusion	
Text	Assumption description.

* to see how assumption fields are integrate on quotes, see: **Quotation Section tables – Section Assumption.**

Section Note Fields*

Note	
CreateOn	Date note was created
CreatedByName	User who create the note
Note	Note description

* to see how note fields are integrate on quotes, see: **Quotation Section tables – Section Notes.**

Section Attachment Fields*

Attachment	
AttachmentImage	Date attachment was added
CreatedOn	Attachment image
Name	Filename of the Attachment

* to see how attachment fields are integrate on quotes, see: **Quotation Section tables – Section Attachment.**

Quotation Stage Additional Tables

The following tables only work with **Section Details** header covered them, more info see: **Preparing the Document**

Stage Details Fields

Stage Details	
StageNo	Stage Number
StageName	Stage Name
StageSubTotal	Stage Amount Excluding Tax
StageSubTotalIncTax	Stage Amount Including Tax
StageTax	Stage Tax

Job Additional Tables

The following tables only work with **Job** header covered them, more info see: **Preparing the Document**

Check Ins Fields*

Check Ins	
CheckInDate	Check in date
UserFullName	Full name of the user
UserFirstName	First name of the user
StartTime	Time check in start
EndTime	Time check out or end
TotalHours	Total hours
RoleName	Role Name of the associated Labour

* to see how Check In fields are integrated Jobs, see: **Job tables.**

Note Fields*

Notes	
CreateOn	Date note was created
CreatedByName	User who create the note
Note	Note description

* to see how Note fields are integrated to Jobs, see: **Job tables.**

Attachment Fields*

Attachments	
CreatedOn	Date attachment was added
AttachmentImage	Attachment image
Name	Filename of the Attachment

* to see how Attachment fields are integrated to Jobs, see: **Job tables.**

Timesheet Fields*

Timesheet	
UserFullName	Full name of the user
UserFirstName	First name of the user
StartDateTime	Timesheet date time starts
StartTime	Timesheet time starts
EndDateTime	Timesheet date time ends
EndTime	Timesheet time ends
RateType	Timesheet Rate Type
EntryType	Timesheet Entry Type
TotalCost	Timesheet Total Cost
Hours	Timesheet Hours
MealBreakHours	Timesheet meal break hours
IncludesMealBreak	Timesheet includes meal break
Activity	Displays the Activity name for the Timesheet
RoleName	Role Name of the associated Labour

* to see how Timesheet fields are integrated Jobs, see: **Job tables.**

** Only applies to Stages.

Invoice Additional Tables

The following tables only work with **Invoice** header surrounding them, for more info please see:
Preparing the Document

Current Claim Fields*

Current Claim	
ClaimSectionName	Claim section name
DisplayOrder	Display Order of the claims
ClaimPurchaseOrderNumber	Claim Purchase Order Number
ClaimValueContractIncTax	Contract value including tax
ClaimValueContractExTax	Contract value excluding tax
ClaimPercentIncTax	Claim percentage including tax (will be the same for ex tax also!)
ClaimValueIncTax	Claim value including tax
ClaimValueExTax	Claim value excluding tax
ClaimPercentToDateExTax	Claim percentage to date excluding tax
ClaimValueToDateExTax	Claim value to date excluding tax
ClaimValueToDateIncTax	Claim value to date including tax
ClaimRetentionAmountExTax	Claim Retention Amount Ex Tax
ClaimRetentionIncTax	Claim Retention Inc Tax
CurrentClaimLessRetentionExTax	Current Claim Less Retention Ex Tax
CurrentClaimLessRetentionIncTax	Current Claim Less Retention Inc Tax
CurrentClaimLessRetentionTax	Current Claim Less Retention Tax
ClaimNumber	Claim Number
ClaimSectionBalanceRemainingExTax	Claim Section Balance Remaining Ex Tax
ClaimSectionBalanceRemainingIncTax	Claim Section Balance Remaining Inc Tax
ClaimBalanceRemainingExTax	Claim Balance Remaining Ex Tax
ClaimBalanceRemainingIncTax	Claim Balance Remaining Inc Tax
PriorClaimRetentionAmountExTax	Prior Claim Retention Amount Ex Tax
PriorClaimRetentionIncTax	Prior Claim Retention Inc Tax
BalanceDueLessRetentionExTax	Balance Due Less Retention Ex Tax
BalanceDueLessRetentionIncTax	Balance Due Less Retention Inc Tax

* to see how current claim fields are integrate to invoices, see **Invoice tables.**

Previous Claim Fields*

Previous Claim	
ClaimNumber	Claim number
InvoiceDate	Invoice date
InvoiceNumber	Invoice number
TotalClaimedExTax	Total claimed excluding tax
TotalClaimedIncTax	Total claimed including tax
TotalPaid	Total paid
BalanceOutstandingExTax	Balance outstanding excluding tax
BalanceOutstandingIncTax	Balance outstanding including tax
ClaimName	Claim Name
PriorClaimTotalBalanceRemainingExTax	Prior Claim Total Balance Remaining Ex Tax
PriorClaimTotalBalanceRemainingIncTax	Prior Claim Total Balance Remaining Inc Tax
PriorClaimRetentionAmountExTax	Prior Claim Retention Amount Ex Tax
PriorClaimRetentionIncTax	Prior Claim Retention Inc Tax
PreviousClaimLessRetentionExTax	Previous Claim Less Retention Ex Tax
PreviousClaimLessRetentionTax	Previous Claim Less Retention Tax
PreviousClaimLessRetentionIncTax	Previous Claim Less Retention Inc Tax

* to see how previous claim fields are integrate to invoices, see **Invoice tables.**

Current Variation Claim Fields*

Current Variation Claim	
`ClaimSectionName`	Claim section name
`DisplayOrder`	Display Order of the variation claims
`ClaimPurchaseOrderNumber`	Claim Purchase Order Number
`ClaimValueContractIncTax`	Contract value including tax
`ClaimValueContractExTax`	Contract value excluding tax
`ClaimPercentIncTax`	Claim percentage including tax (will be the same for ex tax also!)
`ClaimValueIncTax`	Claim value including tax
`ClaimValueExTax`	Claim value excluding tax
`ClaimPercentToDateExTax`	Claim percentage to date excluding tax
`ClaimValueToDateExTax`	Claim value to date excluding tax
`ClaimValueToDateIncTax`	Claim value to date including tax
`ClaimRetentionAmountExTax`	Claim Retention Amount Ex Tax
`ClaimRetentionIncTax`	Claim Retention Inc Tax
`ClaimNumber`	Claim Number
`ClaimSectionBalanceRemainingExTax`	Claim Section Balance Remaining Ex Tax
`ClaimSectionBalanceRemainingIncTax`	Claim Section Balance Remaining Inc Tax
`ClaimBalanceRemainingExTax`	Claim Balance Remaining Ex Tax
`ClaimBalanceRemainingIncTax`	Claim Balance Remaining Inc Tax
`PriorTotalClaimedExTax`	Prior / Previous Total Claim Ex Tax
`PriorTotalClaimedIncTax`	Prior / Previous Total Claim Inc Tax
`CurrentClaimLessRetentionExTax`	Current Claim Less Retention Ex Tax
`CurrentClaimLessRetentionIncTax`	Current Claim Less Retention Inc Tax
`CurrentClaimLessRetentionTax`	Current Claim Less Retention Tax
`BalanceDueLessRetentionExTax`	Balance Due Less Retention Ex Tax
`BalanceDueLessRetentionIncTax`	Balance Due Less Retention Inc Tax

* to see how current variation claim fields are integrate to invoices, see **Invoice tables.**

Purchase Order Additional Tables

The following tables only work with **Purchase Order** covered them, more info see: **Preparing the Document**

Purchase Order Line*

Purchase Order Line	
PartNumber	Supply part number
Description	Supply description
Quantity	Supply quantity ordered
Annotation	Supply annotation
UnitPriceExTax	Supply Unit Price Excluding Tax
UnitPriceIncTax	Supply Unit Price Including Tax
UnitPrice	Alias for UnitPriceExTax
IsTaxable	Supply taxable
LineTotalExTax	Total price excluding tax
LineTotalIncTax	Total price including tax
LineTotal	Alias for LineTotalExTax
UOM	Unit of Measurement

* to see how purchase order line fields are integrate to purchase orders, see **Purchase Order Tables.**

Scheduler Additional Tables

The following tables only work with **Scheduler** header covered them; more info see: **Preparing the Document**

Scheduler Detail Fields*

Scheduler Details	
BookingStartDate	Date when start a booking
BookingStartTime	Time when start a booking
BookingStartMonth	Month name when start a booking
BookingEndDate	Date when ends a booking
BookingEndTime	Time when ends a booking
BookingEndMonth	Month name when ends a booking
BookingTimeWindow	Time window of a booking
BookingTotalHours	Total Hours of the booking
BookingNotes	A note of booking
Number	A job / quote number
Name	A job / quote name
Description	A job / quote description
Status	A job / quote status
JobType	A job type of the job / quote
TotalAmountExTax	A job / quote total amount excluded tax
TotalTax	A job / quote total tax
TotalAmountIncTax	A job / quote total amount included tax
BookingAddressLine1	A job / quote address line 1
BookingAddressLine2	A job / quote address line 2
BookingAddressLine3	A job / quote address line 3
BookingSuburb	A job / quote suburb
BookingState	A job / quote state
BookingPostcode	A job / quote postcode
BookingCountry	A job / quote country

* To see how scheduler detail fields are integrated into the scheduler, **see scheduler tables.**

** you can also include:

      - Site customer info, see: **Site Customer Fields.**

      - Billing customer info, see: **Billing Customer Fields.**

- Assigned user info, see **Assigned User Fields**.

RFI Additional Tables

The following tables only work with **Scheduler** header covered them; more info see: **Preparing the Document**

Attachment Fields *

Attachment Details	
AttachmentImage	Attachment image
AttachmentName	Filename of the Attachment
AttachmentCreatedOn	Date attachment was added

* To see how scheduler detail fields are integrated into the RFI, **see RFI tables.**

Custom Field Tables

Custom Fields can be setup for many areas such as Quote, Job, Equipment, etc. and can be displayed on generated documents. The process will be the same for all areas.

Parent Details

To display the value of a Custom Field in a parent detail area (**QuoteDetails**, **JobDetails**, etc), create a MergeField with the same name as the Custom Field. Ensure the spelling, including any punctuation and spaces, is correct.

Custom Field	
`CustomField`	Will display the value for the Custom Field named **CustomField**
`Custom Field`	Will display the value for the Custom Field named **Custom Field**

Section Details

To display the value of a Custom Field in a parent detail area (QuoteDetails, JobDetails, etc), create a MergeField with the same name as the Custom Field prefixed with the word "Section". Ensure the spelling, including any punctuation and spaces, is correct.

Custom Field	
`Section CustomField`	Will display the value for the Custom Field named **Section CustomField**
`Section Custom Field`	Will display the value for the Custom Field named **Custom Field**