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1   Introduction

All documents issued in Projetex can be saved to an *RTF*, *DOC* or *PDF* file, or sent directly to printer. The outlay of the resulting file or printout will be determined by a *template*.

Template is an *RTF* ("Rich Text Format") file which outlay and text format is used when saving Projetex documents. *RTF* files can be opened using most text editors, including MS Word.

Document templates can be created and edited by user. Each document can have a number of alternate templates.

The following documents can be saved as printable *RTF*, *PDF* and *DOC* files using their own templates:

- Invoices to clients.

- Purchase orders to freelancers.

- Payments from clients summaries.

- Payments to freelancers summaries.

- Projects, client jobs and expert jobs summaries.

- Job assignments to corporate experts.

- Quotes to clients.

- Quotes to freelancers.

- Prices for clients.

- Prices for freelancers.

Note: You can disable access to **Templates settings** for specified users. To disable access to **Templates settings**, go to *Projetex Server* **Corporate Settings** and click **Users and Access** settings. Then select an user, click **Edit** button and deselect **View Templates Settings** checkbox.

2   Saving and Printing Documents

Documents can be saved using windows **Edit Invoice**, **Edit PO**, **Edit Project** and so on, as well as **Prices** tabs of **Client** and **Freelancer** windows, and **General Prices for Clients** and **General prices of Freelancer** windows.

Any window which has **RTF Templates** area can be used to save its data in a printable document. Until the data which you are editing is saved in your database, **RTF Templates** area of document window will look like this:

To save a document, first apply changes made to this document by clicking **Apply** button. Once the document has been saved in database, RTF template controls for it will become active:

 Use **RTF Templates** drop-down list to select the template which must be used for saving this invoice in an RTF file.

- Click **Save** button to save template in the respective invoice folder.

- Click **Save&Open** button to open this invoice in your default text editor immediately after saving

it.

- Click **Print** button to quickly send this invoice to printer.

Note: You can choose to save the output file in *RTF*, *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

3 Editing Templates

Template files

Each document type (like invoices, purchase orders, quotes, and so on) uses templates stored in specific folder, related to certain document type:

```
Templates
  CLIENTS
      Invoices
      Jobs
      Payments
      Prices
      Quotes
  EXPERTS
      CORPORATE
          JAs
          Jobs
      FREELANCE
          Jobs
          Payments
          POs
          Prices
          Quotes
  PROJECTS
```
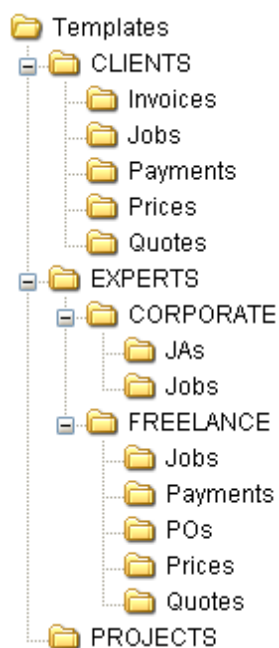
By editing template overlay and format, you edit overlay and format of all the documents which will be saved with the help of this template. A number of alternative templates can be created for one document type.

Opening Templates for Editing

Templates can be downloaded, created, edited and uploaded to server on the **Templates** section of Projetex Workstation **Corporate Settings** window.

To open **Templates** settings:

1. On the **Settings** menu of Projetex Workstation click **Corporate** command.

2. On the **Corporate Settings** window click **Templates** area.

3. Navigate template folders to locate required template.

4. Open template file in text editor (MS Word or any other editor supporting RTF format).

5. After making all the necessary changes, save **Template** in the same or new RTF file of the same folder.

 Note: When you open a template file for editing, you open your local copy of that template. Any

changes you make will be valid for your Projetex Workstation only, unless you choose to upload or update template on server.
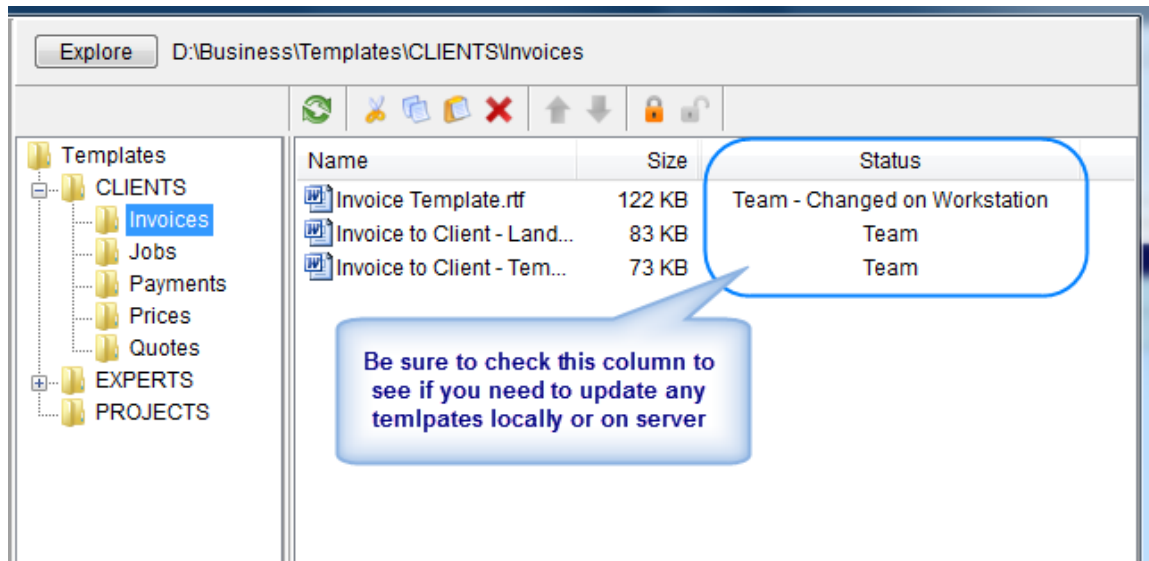
Template Variables

Variable is a certain symbol combination which is entered in template files. When a document is saved using template, Projetex recognizes the variable and inserts required data in the resulting document.

Variables are indicated with "\" (backslash) symbols in the beginning and in the end,

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Example:

\CLIENT_NAME\, \CLIENT_STREET1\, \CLIENT_PHONE1\

Each variable represents a portion of data which will be inserted in its place when the document is saved.

 Note: Template can be edited without changing the variables wording and outlay (fonts and colors can still be changed).

Advanced users can learn about templates variables; add/delete them as necessary, customizing templates to the maximum.

4 Logic and Syntax of Templates

Variables

All variables and commands can be identified by \ (*backslash*) symbol in the beginning and in the end. Variables display data, extracted from Projetex database, and relevant to each particular saved document.

Example:

In example below you can see *\CLIENT_NAME*, *\CLIENT_STREET1* and *\CLIENT_PHONE1* variables, along with some static text:

```
To: \CLIENT_NAME\

Address: \CLIENT_STREET1\

Phone: \CLIENT_PHONE1\
```

When you use this template by clicking on **Save** or **Print** in some dialog box, *\CLIENT_NAME* variable will be replaced by name of currently *client*, valid to this particular document, *\CLIENT_STREET1* — by *client's street address* and *\CLIENT_PHONE1* — by *client's phone number*. The final output will look like this:

```
To: XYZ Company

Address: Elm Street, 1

Phone: +1 212 898 11 31
```

Variables like *\INVOICE_CODE* will display code of currently saved invoice, variables like *\INVOICE_DATE* will display issue date of current invoice, and so on.

Note: Numerical values sometimes are surrounded by fnum command. This command simply tells the parser to round up the value to specified number of digits after decimal point (2 digits in the example below).

Example:

```
Job Total: \fnum(dtLinkJobs:TOTAL, 2)\
```

Data Scan commands

Another of RTF templates is **Data Scan** commands. These are used to create tables in which number of rows is determined by the number of records in database.

1. Begin by entering *\scan(dtLinkJobs)* command. This must not necessarily be dtLinkJobs, depending on the template, this can be:

- \scan(dtLinkJobs)\ — in *invoices*, *job assignment* and *PO* templates, to display jobs included in

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invoice, *JA* or *PO*.

- \scan(dtLinkInvoices)\ — in *payment* templates to display invoices linked to the payment.

- \scan(dtLinkPayments)\ — in *invoice* and *PO* templates to indicate linked sums.

2. Insert table header between \scan(dtLinkJobs)\ and \scanentry\.

3. Insert one row of data-columns after \scanentry\. Every variable in table must be preceded with *dtlink* command. For instance if the table begins with \scan(**dtLinkJobs**)\, each variable must have this link included: **dtLinkJobs**:JOB_NAME\, **dtLinkJobs**:COMPLETED\, and so on.

4. Insert \endscan\ after data-columns.

Note: Use noeof to hide table's header and footer if the table body appears to be empty. For instance, if your *invoice* includes only *jobs* and no *expenses*, the header and footer for *expenses* will not be saved/printed.

Example:

```
\scan:dtlinkJOBS\

PO No.          Job Name

\scanentry\

\dtlinkJobs:PO\  \dtlinkJobs:JOB_NAME\

\scanfooter\

Jobss Total: \JOBS_TOTAL\

\endscan\
```

Command \scan(dtLinkJobs)\ will make the parser scan (go from first record to the last one) all selected data in **Jobs** table (in this particular case all *jobs* included in the *invoice*) and output them to file or printer.

Text between \scan(dtLinkJobs)\ command and \scanentry\ command is table header.

Text between \scanfooter\ and \endscan\ commands will be considered table footer and will only be displayed once at the end of this table.

Text between \scanentry\ and \scanfooter\ commands is table "body". It includes variables from columns which must be listed in the table. In example above these are:

- \dtLinkJobs:PO\ – PO Number.

- \dtLinkJobs:COMPLETED\ – Date of job delivery.

- \dtLinkJobs:JOB_NAME\ – Name of the job.

- \dtLinkJobs:SERVICE\ – Service provided.

Condition checking

This allows the template to react to certain varying conditions and produce output suitable to each of possible conditions. The logic is the following \IF(**condition**)\ **Reaction** \ENDIF\.

Example:

If *Discount 1* is applied, display *discount name*, *discount value* and *subtotal*. The code is as follows:

```
\IF(DISCOUNT1)\

\DISCOUNT1NAME\: \DISCOUNT1VALUE\

Subtotal: \AFTERDISCOUNT1\\endif\
```

This will make the template check if discount 1 is applied, and if so — display data between \IF(...)\ and \ENDIF\ commands.

- DISCOUNT1 is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, Projetex sets DISCOUNT1 into true if first discount is present and into false, if there is no first discount.

- When \IF(DISCOUNT1)\ is encountered in template, parser checks DISCOUNT1 logical value, and if it is true, runs the code below this command, until \endif\ is encountered, which instructs parser to stop. If DISCOUNT1 is false, everything until \endif\ command is skipped.

- In this particular case, without \IF(DISCOUNT1)\ command, the parser would output empty string with: and empty **Subtotal**: in cases when there would not be discount. But with \IF(DISCOUNT1)\ command, in such cases above block is skipped in its entirety.

Arithmetic calculations syntax

Arithmetic can be performed in templates with the following syntax:

\((JOBS_TOTAL+100-10)*10)/2\

- The whole expression must be included in backslashes;
- All arithmetic operations must be defined by the following symbols + - / *;
- The brackets inside backlashes must be positioned by the rules of arithmetic.

Logical operations syntax

Logical operations: && (and), || (or), ! (not), can be performed in templates with the following syntax:

```
\IF( (table1:field1>b+1) || (table1:field1=0) )\

............

\ENDIF\
```

5   Advanced commands and functions

Format of *IF-ELSIF-ELSE-ENDIF* construction is:

```
\If(Condition1)\

Reaction1

\elsif(Condition2)\

Reaction2

\else\

Reaction3

\endif\
```

Note: *If*\ and *endif*\ are the mandatory commands in this construction, *elsif*\ and *else*\ are an optional commands. Condition must be a variable with boolean value. Such variables can have only two values: True or False.

Example:

Invoice template	Explanation

`\If(INV_IS_PAID)\`
 	
`Invoice is paid`
 	
`\else\`
 	
`Invoice is not paid`
 	
`\endif\`
	If the invoice is paid(INV_IS_PAID=True),then
	
	Invoice is paid
	
	is displayed in produced invoice, if invoice is not paid (INV_IS_PAID=False), then
	
	Invoice is not paid
	
	is displayed in produced invoice.

or

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
……..
 	
`\scanentry\`	

……..
 	
`\If(INV_IS_PAID)\`
 	
`Invoice is paid`
 	
`\elsif(DTLINKJOBS:`
`CJOB_ISCOMPLETED=tr`
`ue)\`
 	
`Invoice is not paid`
 	
`\else\`
 	
`Job is not`
`completed`
 	
`\endif\`
 	
`\scanfooter\`
 	
……..
 	
`\endscan\`
	If the invoice is paid(INV_IS_PAID=True),then
	
	Invoice is paid is displayed in produced invoice,
	
	if invoice is not paid(INV_IS_PAID=False), then, if (DTLINKJOBS:CJOB_ISCOMPLETED=true),
	
	then Invoice is not paid is displayed in a produced invoice,
	
	if invoice is not paid(INV_IS_PAID=False) and if (DTLINKJOBS:CJOB_ISCOMPLETED=false),then
	
	Job is not completed is displayed in a produced invoice.

IIF function

Function **IIF** returns one of the two values depending on the value of a logical expression. The syntax is: IIF(Logical_expr, Value1, Value2)

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`...`
 	
`\scanentry\`
 	
`...`
 	
`\IIF(DTLINKJOBS:`
`CJOB_ISCOMPLETED=true,1`
`00,0)\`
 	
`...`
 	
`\scanfooter\`
 	
`...`
	If the Client Job is completed (DTLINKJOBS: CJOB_ISCOMPLETED=true) then 100.00 is displayed in a produced invoice. If the Client Job is not completed (DTLINKJOBS: CJOB_ISCOMPLETED=false), then 0.00 is displayed in a produced invoice.

```
\endscan\
```

Numeric report functions.

ROUND - The Round function rounds a real-type value to an integer-type value. 0.5 is always processed to largest integer number. This is not a banker's rounding.

Invoice template	Explanation
`\Round(JOBS_TOTAL)\`	If Jobs Total is 504.49, then 504 is displayed in a produced invoice, If Jobs Total is 504.50, then 505 is displayed in a produced invoice.

INT - The INT function returns the integer part of a real number.

Invoice template	Explanation
`\Int(JOBS_TOTAL)\`	If Jobs Total is 504.49, then 504 is displayed in a produced invoice, If Jobs Total is 504.51, then 504 is displayed in a produced invoice.

SUM function

Function SUM can be used after *\scan(dtLink Jobs)*, *\scan(dtLink Invoices)* or *\scan (dtLink Payments)* to give to some new custom variable the value of sum of the values in the defined field. The syntax is:

```
\scan(table1)\

\endscan, sum(field of the table1, variable1)\

Total: \variable1\
```

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, sum`
`(DTLINKJOBS:`
`CJOB_TOTAL, V1)\`
 	
`Total: \V1\`
	Variable V1 is set to return the sum of client job totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00, then
	
	Total: 1023.00 will be displayed in a produced invoice.

CTN function

Function CTN can be used after *\scan(dtLinkJobs)*, *\scan(dtLinkInvoices)* or *\scan (dtLinkPayments)* to give to some new custom variable the value of number of data field entries with values <> 0. The syntax is:

`\scan(table1)\`

`\endscan, ctn(field of the table1, variable1)\`

`Total: \variable1\`

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, ctn`
`(DTLINKJOBS:`
`CJOB_TOTAL, V1)\`
 	
`Number of Client`
`Jobs: \V1\`
	Variable V1 is set to return the number of client jobs with totals that are <> 0 anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are three client jobs in this invoice with totals of 345.00, 678.00 and 901.00, then
	
	Number of Client Jobs: 3.00 will be displayed in a produced invoice.

NORESET option with SUM and CTN functions

NORESET option can be used with SUM and CTN functions to add the new values of the source field to the previous result of the function. The syntax is:

`\scan(table1)\`

`........`

`\endscan, sum(field of the table1, variable1)\`

`\scan(table2)\`

`........`

`\endscan, sum(field of the table2, variable1,noreset)\`

`All totals: \variable1\`

Invoice template	Explanation

`\scan(dtLinkJobs)\`
 	
`\endscan, sum(DTLINKJOBS:`
`CJOB_TOTAL, V1)\`
 	
`\scan(DTLINKPAYMENTS)\`
 	
`\endscan, sum(DTLINKPAYMENTS:`
`CPAYM_TOTAL, V1,noreset)\`
 	
`Total: \V1\`
	Variable V1 is set to return the sum of client job totals plus payment totals anywhere in this invoice, just by entering \V1\ anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00 and one payment with total of 77.00 , then
	
	Total: 1100.00 will be displayed in a produced invoice.

6 Locale Settings And Date Format

Locale format determines the format of dates, decimal numbers, currency volumes in the resulting document. If your clients or freelancers work in different countries their locale format is very likely to be different. To make templates display correct date and time format, correct digit grouping or decimal separator symbols, and so on, configure locale settings and set the desired format.

There are two ways of configuring locale format:

1. In Projetex Workstation (for each client and freelancer individually):

- open **Client** window and click **Main** tab;

- click **Locale Format** button in client profile;

- select **Custom locale** in the drop-down list next to **Generation of RTF files:** string;

- configure the code in **Short Date Format** or **Long Date Format** to include 4-5 capital M letters (like dd.MMMM.YYYY).

Note: Long Date Format is being used for "long" date variables: *DATE_DUE_LONG*\, *INVOICE_DATE_LONG*\, and so on. Settings in **Short Date Format** will affect regular variables, like *DATE_DUE*\, *INVOICE_DATE*\, and so on.

2. In Windows Control Panel (these settings are used as default in Projetex):

- open Windows Control Panel

- double-click **Regional and Language Options**

- click **Customize** button on **Regional Options** tab

- click **Date** tab

- configure long (or short) date format options to include 4-5 capital M letters (like dd.MMMM. YYYY). To remove day of the week from view, delete extra "d" letters, so that no more than 2 "d-s" are present in the code string.

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7   Templates Storage and Management

In Projetex all templates are stored in subfolders of *Templates* folder in centralized *BusinessServer* folder on server. In order to work with a template, you will need to download a local copy, or create new local template which later can be uploaded to server.

To manage templates:

1. On the **Settings** menu click **Corporate**.

2. On the **Corporate Settings** click **Templates**.

Templates are stored in different folders, each determining a type of document, this template is meant for. Any RTF file located in that folder will be recognized by Projetex as a template for the document that folder represents.

> **Example:**
>
> An RTF file *anyname.rtf*, located at *D:\BusinessServer\Templates/CLIENTS/Invoices/* will be recognized by as an invoice template. It will appear in the **RTF Templates** drop-down list of **Edit Invoice** window.

Only local template files, located in local *Business* folder (by default *D:\BusinessServer*) can be used to save documents. Templates stored in centralized *BusinessServer* folder are meant for sharing and updating templates on Projetex Workstation. Thus when you open a template file for editing, you open your local copy of that template. Any changes you make will be valid for your Projetex Workstation only, unless you choose to upload or update template on server.

Templates synchronization

After templates have been uploaded to server, they will update on all local *Business* folders automatically. Such new template will be uploaded to local *Business* folders after a user will choose this template from **RTF Templates** drop-down list and click **Save**, **Save&Open** or **Print** button.

8 Available Templates Variables

8.1 Common Template Variables

The following variables can be used in all of the Projetex templates.

User Information Variables

Code to paste to template	Information to be displayed in the saved document
\COMPANY_NAME\	Name of registered company (i.e. your company name) taken from your License Key. This name cannot be modified, however you can delete this variable from template and type your preferred name directly.
\COMPANY_PAYMENT_TERMS\	Payment terms set for freelance experts. Can be changed on **Corporate Settings** tab of Projetex Server Administrator.
\COMPANY_PAYMENT_TERMS_NOTES\	Notes, entered for payment terms to freelance experts. Can be changed on **Corporate Settings** tab of Projetex Server Administrator.
\COMPANY_CURRENCY\	Base currency of your company. Can be changed on **Corporate Settings** tab of Projetex Server Administrator.
\CURRENT_USER_NAME\	Name of the Projetex Workstation user, who saved (printed) document. Can be changed on **Corporate Settings** tab of Projetex Server Administrator.
\CURRENT_USER_POSITION\	Position of the Projetex Workstation user, who saved (printed) document. Can be changed on **Corporate Settings** tab of Projetex Server Administrator.

Date Variables

Code to paste to template	Information to be displayed in the saved document
\DATE\	Date in short format. **Example:** 10/4/2006

| \DATE_LONG\ | Date in long format.

Example:

Monday, October 04, 2006 |

8.2 Client Template Variables

Client variables refer to clients, connected with the document. For example, in the invoice template \CLIENT_NAME\ variable will return the name of client, to whom the invoice was issued. This data can be changed on the **Main** tab of **Client** window.

Client Data Template Variables

Code to paste to template	Information to be displayed in the saved document
\CLIENT_NAME\	Name of client.
\CLIENT_CODE\	Client Code of client.
\CLIENT_CURRENCY\	Client's currency.
\CLIENT_PAYMENT_TERMS\	Payment terms of a client. **Example:** Within 30 days
\CLIENT_MINFEE\	Minimum fee set in payment terms of a client.
\CLIENT_PAYMENT_TERMS_NOTES\	Text, entered in the **Additional Notes** field of client's payment terms.
\CLIENT_ADDRESS\	Complete address of client. Order of different elements can be changed on **Corporate Settings** tab of Projetex Server Administrator.
\CLIENT_STREET1\	Street address of a client (entered into the upper **Street Address** field).
\CLIENT_STREET1_C\	Street address of a client, followed by a comma (not displayed if **Street Address** field is empty).
\CLIENT_STREET2\	Alternate/second street address of a client (entered into the lower **Street Address** field).
\CLIENT_STREET2_C\	Alternate/second street address of a client, followed by a comma (not displayed if **Street Address** field is empty).
\CLIENT_CITY\	Client's city of residence.
\CLIENT_CITY_C\	Client's city name, followed by a comma (not displayed if **City** field is empty).
\CLIENT_STATE\	Client's state/province of residence.

\CLIENT_STATE_C\	Client's state/province, followed by a comma (not displayed if **State** field is empty).
\CLIENT_COUNTRY\	Client's country of residence.
\CLIENT_COUNTRY_C\	Client's country of residence, followed by a comma (not displayed if **Country** field is empty).
\CLIENT_ZIP\	Client's ZIP code.
\CLIENT_ZIP_C\	Client's ZIP code, followed by a comma (not displayed if **ZIP Code** field is empty).
\CLIENT_EMAIL1\	E-mail address of a client.
\CLIENT_EMAIL2\	Additional e-mail address of a client.
\CLIENT_PHONE1\	Phone number of a client.
\CLIENT_PHONE2\	Additional phone number of client.
\CLIENT_PHONE3\	Additional phone number of client.
\CLIENT_PHONE4\	Additional phone number of client.
\CLIENT_FAX\	Fax number of client.
\CLIENT_WEB\	Web site address of client.
\CLIENT_MINFO\	Text, entered in **Marketing Notes** section on the **Marketing** tab of **Client** window.
\CLIENT_MWEB\	Text, entered in **Marketing Link** section on the **Marketing** tab of **Client** window.
\CLIENT_INFO\	Text, entered in **Additional Information** section on the **Main** tab of **Client** window.
\CLIENT_VATNUM\	VAT code of a client.

8.3   Project Template Variables

Code to paste to template	Information to be displayed in the saved document
\PROJECT_NAME\	Name of project.
\PROJECT_CODE\	Project code.
\PROJECT_CLIENT_NAME\	Client project created for.
\PROJECT_CLIENT_CODE\	Client reference number.
\PROJECT_INFO\	Information about the project.
\CORPORATE_PM_NAME\	Corporate project manager
\CLIENT_PM_NAME\	Client project manager
\PROJECT_DATE_STARTED\	Date when project was started in following format: 10/4/2006.
\PROJECT_DATE_DEADLINE\	Project deadline in following format: 10/4/2006.
\PROJECT_DATE_COMPLETED\	Date of project completion in following format: 10/4/2006.
\PROJECT_DATE_STARTED_LONG\	Date when project was started in following format: Monday, October 04, 2006.
\PROJECT_DATE_DEADLINE_LONG\	Project deadline in following format: Monday, October 04, 2006.
\PROJECT_DATE_COMPLETED_LONG\	Date of project completion in following format: Monday, October 04, 2006.

8.4 Contact Template Variables

Code to paste to template	Information to be displayed in the saved document
\SALUTATION\	Salutation of contact. **Example:** Mr., Ms., Mrs.
\TITLE\	Contact title.
\CONTACT_NAME\ \PM_NAME\ \ATTENTION\	Contact name.
\CONTACT_EMAIL1\	Contact email address.
\CONTACT_EMAIL2\	Contact email address 2 (if available).
\CONTACT_PHONE1\	Contact phone number.
\CONTACT_PHONE2\	Contact phone number 2 (if available).
\CONTACT_FAX\	Contact fax number.
\CONTACT_NOTES\	Contact notes.

8.5 Quote Template Variables

Common Quote Variables

Code to paste to template	Information to be displayed in the saved document
\QUOTE_NAME\	Possible quote name.
\QUOTE_CODE\ \CODE\	Quote code.
\SERVICE\	Service name.
\REQUEST\	Request for quote.
\ANSWER\	Answer to request for quote.
\VOLUME\	Quote volume.
\PRICING\ \TYPE\	Quote pricing type (per unit, flat fee, and so on).
\PRICE\	Quote price.
\UNITS\	Quote units.
\TOTAL\	Quote total.
\DATE_SENT\ \SENT\	Date sent in following format: 10/4/2006
\DATE_SENT_LONG\ \LONGSENT\	Date sent in following format: Monday, October 04, 2006
\START\ \ESTSTART\	Date assigned in following format: 10/4/2006
\START_LONG\\LONGESTSTART\	Date assigned in following format: Monday, October 04, 2006
\COMPLETION\ \ESTCOMPLETION\	Deadline date in following format: 10/4/2006
\LONG_COMPLETION\ \LONGESTCOMPLETION\	Deadline date in following format: Monday, October 04, 2006
\COUNT_NOTES\	CATCount notes.
\STATUS\	Status of quote (unknown, accepted,

	rejected)

The following variables refer to draft client jobs, added to quote to client. These variables do not apply to freelancer quotes.

Draft Client Job variables for Quotes to Clients

Code to paste to template	Information to be displayed in the saved document
\DTMULTIQUOTEITEMS:QI_NAME\	Name of draft client job.
\DTMULTIQUOTEITEMS:GROUP_NAME\	Group of services of draft client job.
\DTMULTIQUOTEITEMS:SERV_NAME\	Service name of draft client job.
\DTMULTIQUOTEITEMS:UNIT_NAME\	Units in which draft client job volume is specified.
\DTMULTIQUOTEITEMS:QI_PRICE\	Price of draft client job.
\DTMULTIQUOTEITEMS:QI_VOLUME\	Volume of draft client job.
\DTMULTIQUOTEITEMS:QI_FEE_KIND\	Type of price set for client job (can be per unit, flat fee, or free).
\DTMULTIQUOTEITEMS:QI_TOTAL\	Draft client job total.
\DTMULTIQUOTEITEMS: QI_COUNTNOTES\	CATCount notes of draft client job (if job volume had been entered with the help of CATCount).

8.6 Client Job Template Variables

Code to paste to template	Information to be displayed in the saved document
\JOB_NAME\	Job name.
\JOB_CODE\ \CODE\	Job code.
\PO_CODE\ \PO\	Purchase order client issued for this job.
\CLIENT_REF\	Client reference number in accounting system of client.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)
\PRICE\	Job price.
\UNITS\	Job units.
\TOTAL\	Job total.
\ASSIGNED\	Date when job was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\ \LONGASSIGNED\	Date when job was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	Job deadline in following format: 10/4/2006.
\DEADLINE_LONG\ \LONGDEADLINE\	Job deadline in following format: Monday, October 04, 2006.
\COMPLETED\ \DONE\	Completion date in following format: 10/4/2006.
\COMPLETED_LONG\	Completion date in following format:

\LONGCOMPLETED\	Monday, October 04, 2006.
\COUNT_NOTES\	CATCount or AnyCount notes.
\INVOICE_CODE\ \INVOICE\	Invoice code.
\INVOICE_GLOBAL_CODE\ \INV_GLOBAL\	Invoice global code.

8.7 Corporate Job Template Variables

Code to paste to template	Information to be displayed in the saved document
\CEXPERT_NAME\	Name of employee.
\CEXPERT_CODE\	Code of employee.
\CEXPERT_EMAIL1\	Employee email 1.
\CEXPERT_EMAIL2\	Employee email 2.
\CEXPERT_PHONE1\	Employee phone number 1.
\CEXPERT_PHONE2\	Employee phone number 2.
\CEXPERT_FAX\	Employee fax number.
\CEXPERT_AHC\	Employee average hourly cost.
\CEXPERT_INFO\	Employee information.
\JOB_NAME\	Job name.
\JOB_CODE\	Job code.
\CLIENT_PO\	Purchase order client issued for this job.
\CLIENT_REF\	Client reference number in accounting system of client.
\JA_CODE\	Job Assignment code.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)
\AHC\	Average hourly cost of the expert job is assigned to.
\PRICE\	Job price.
\UNITS\	Job units.
\TOTAL\	Job total.
\ASSIGNED\	Date job was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\	Date job was assigned in following format:

	Monday, October 04, 2006.
\DEADLINE\	Job deadline in following format: 10/4/2006.
\DEADLINE_LONG\	Job deadline in following format: Monday, October 04, 2006.
\COMPLETED\	Completion date in following format: 10/4/2006.
\COMPLETED_LONG\	Completion date in following format: Monday, October 04, 2006.
\TIME_SPENT\	Time spent on job completion.
\HOURS_SPENT\	Hours spent on job completion.
\MINUTES_SPENT\	Minutes spent on job completion.
\COUNT_NOTES\	CATCount or AnyCount notes.
\INVOICE_CODE\	Invoice code.
\JOB_QUALITY\	Quality of completed jobs (set by project manager).
\NET_JOBS_TOTAL\ \NETJOBSTOTAL\	Net jobs total number.

8.8 Freelance Job Template Variables

Code to paste to template	Information to be displayed in the saved document
\FEXPERT_NAME\	Name of freelance expert.
\FEXPERT_CODE\	Freelance expert code.
\FEXPERT_CURRENCY\	Freelance expert currency.
\FEXPERT_MINFEE\	Freelance expert minimum fee.
\FEXPERT_PAYMENT_TERMS\	Freelance expert payment terms.
\FEXPERT_PAYMENT_TERMS_NOTES\	Freelance expert payment terms additional notes.
\FEXPERT_ADDRESS\	Freelance expert address.
\FEXPERT_STREET1\	Freelance expert street 1.
\FEXPERT_STREET2\	Freelance expert street 2.
\FEXPERT_CITY\	Freelance expert city.
\FEXPERT_STATE\	Freelance expert state.
\FEXPERT_COUNTRY\	Freelance expert country.
\FEXPERT_ZIP\	Freelance expert zip code.
\FEXPERT_EMAIL1\	Freelance expert email address.
\FEXPERT_EMAIL2\	Freelance expert email address 2.
\FEXPERT_PHONE1\	Freelance expert phone number 1.
\FEXPERT_PHONE2\	Freelance expert phone number 2.
\FEXPERT_PHONE3\	Freelance expert phone number 3.
\FEXPERT_PHONE4\	Freelance expert phone number 4.
\FEXPERT_FAX\	Freelance expert fax number 2.
\FEXPERT_WEB\	Freelance expert Web site address.
\FEXPERT_AINFO\	Freelance expert application information.
\FEXPERT_INFO\	Freelance expert general information.
\FEXPERT_VATNUM\	Freelance expert VAT number.
\JOB_NAME\	Job name.
\JOB_CODE\	Job code.

\PO_CODE\	Purchase order client issued for this job.
\PO_GLOBAL_CODE\	Purchase order client issued for this job global code.
\CLIENT_REF\	Client reference number in accounting system of client.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)
\PRICE\	Job price.
\PRICING\	Fee type.
\UNITS\	Job units.
\TOTAL\	Job total.
\ASSIGNED\	Date job was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\ \LONGASSIGNED\	Date job was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	Job deadline in following format: 10/4/2006.
\DEADLINE_LONG\	Job deadline in following format: Monday, October 04, 2006.
\COMPLETED\	Completion date in following format: 10/4/2006.
\COMPLETED_LONG\	Completion date in following format: Monday, October 04, 2006.
\COUNT_NOTES\	CATCount or AnyCount notes.
\JA_CODE\	Job assignment code.
\JOB_QUALITY\	Quality of completed job (set by project manager).
\NET_JOBS_TOTAL\	Net jobs total number.

\NETJOBSTOTAL\	

8.9   Invoice Template Variables

Date and code

Code to paste to template	Information to be displayed in the saved document
\STATUS\	Invoice status **Example:** Expected within 30 days, Settled 5 days earlier
\DATE_DUE\ \SETTLEMENT_DATE\	Date when invoice is due in following format: 10/4/2006
\DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\	Date when invoice is due in following format: Monday, October 04, 2006
\INVOICE_DATE\ \INV_DATE\	Date invoice sent in following format: 10/4/2006
\INVOICE_DATE_LONG\ \INV_LONGDATE\	Date invoice sent in following format: Monday, October 04, 2006
\INVOICE_CODE\ \INV_CODE\	Invoice code
\INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\	Invoice global code
\NOTES\ \INVOICE_NOTES\	Invoice notes from **Notes** tab of **Edit Invoice** window

Invoice totals

Code to paste to template	Information to be displayed in the saved document
\INVOICE_TOTAL\	Invoice total in client's currency

`\INVOICE_TOTAL_BASE\`	Invoice total in base currency
`\JOBS_TOTAL\`	Jobs total in client's currency
`\JOBS_TOTAL_B\`	Jobs total in base currency
`\NET_JOBS_TOTAL\`	Jobs total with discounts in client's currency
`\NET_JOBS_TOTAL_B\`	Jobs total with discounts in base currency

Taxes

Code to paste to template	Information to be displayed in the saved document
`\TAX1\`	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
`\TAX1_NAME\`	Tax 1 name
`\TAX1_VALUE\`	Tax 1 value in client's currency
`\TAX1_VALUE_B\`	Tax 1 value in base currency
`\TAX2\`	Used in algorithms (If tax 2 exists = True, if it doesn't = False)
`\TAX2_NAME\`	Tax 2 name
`\TAX2_VALUE\`	Tax 2 value in client's currency
`\TAX2_VALUE_B\`	Tax 2 value in base currency
`\TAXES\`	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
`\AFTER_TAX1\`	Total in client's currency after Tax 1 applied
`\AFTER_TAX1_B\`	Total in base currency after Tax 1 applied

Discounts

Code to paste to template	Information to be displayed in the saved document
`\DISCOUNT1\`	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)

\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_VALUE\	Discount 1 value in client's currency
\DISCOUNT1_VALUE_B\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the **Discount/Markup** field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_VALUE\	Discount 2 value in client's currency
\DISCOUNT2_VALUE_B\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the **Discount/Markup** fields are set; used in algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total in client's currency after Discount 1 applied
\AFTER_DISCOUNT1_B\	Total in base currency after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts in client's currency
\NET_JOBS_TOTAL_B\	Jobs total with discounts in base currency

Payment status variables

Code to paste to template	Information to be displayed in the saved document
\INVOICE_DUE\	Balance due in client's currency
\INVOICE_DUE_BASE\	Balance due in base currency
\INVOICE_PAID\	Total payments linked to this invoice in client's currency
\INVOICE_PAID_BASE\	Total payments linked to this invoice in base currency
\INV_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)
\BEFORE_ADJUSTMENTS\	Invoice total in client's currency, excluding adjustments
\BEFORE_ADJUSTMENTS_B\	Invoice total in base currency, excluding

	adjustments
\ADJUSTMENTS_VALUE\	Value of the adjustments in client's currency
\ADJUSTMENTS_VALUE_B\	Value of the adjustments in base currency
\ADJUSTMENTS_DESCR\	Description of the adjustments
\INVOICE_PAYMETHOD\	Invoice payment method.
\INVOICE_PAYMETHOD_DESCR\	Payment method description.

Client Job Variables in Invoice

Code to paste to template	Information to be displayed in the saved document
\DTLINKJOBS:CJOB_PONUMB\	Client PO of the job
\DTLINKJOBS:CJOB_NAME\	Client job name
\DTLINKJOBS:CJOB_ASSIGNED\	Date the client job was assigned
\DTLINKJOBS:CJOB_DEADLINE\	Deadline of client job
\DTLINKJOBS:CJOB_ISCOMPLETED\	Completed (Boolean: True/False)
\DTLINKJOBS:CJOB_COMPLETED\	Date the client job was completed
\DTLINKJOBS:CJOB_PRICE\	Price of client job
\DTLINKJOBS:CJOB_VOLUME\	Client job volume
\DTLINKJOBS:CJOB_FEE_KIND\	Pricing (per unit, flat fee)
\DTLINKJOBS:CJOB_RATE\	Exchange rate
\DTLINKJOBS:CJOB_TOTAL\	Job total in client's currency
\DTLINKJOBS:CJOB_TOTAL_B\	Job total in base currency
\DTLINKJOBS:CJOB_INSTRUCTION\	Instructions of client job
\DTLINKJOBS:CJOB_WORKNOTES\	Work notes of client job
\DTLINKJOBS:CJOB_COUNTNOTES\	CATCount notes of client job
\DTLINKJOBS:SERV_NAME\	Service name of client job
\DTLINKJOBS:UNIT_NAME\	Volume units of client job
\DTLINKJOBS:PROJ_CODE\	Project code of client job
\DTLINKJOBS:CJOB_CODE\	Client job code
\DTLINKJOBS:CJOB_CLCODE\	Client Ref. of the job

\DTLINKJOBS:CCON_NAME\	Client PM of the client job

8.10   Payment Template Variables

Basic payments template variables

Code to paste to template	Information to be displayed in the saved document
\PAYMENT_CODE\ \CODE\	Payment code.
\PAYMENT_DATE\ \PDATE\	Date payment received in following format: 10/4/2006
\PAYMENT_DATE_LONG\ \PLONGDATE\	Date payment received in following format: Monday, October 04, 2006
\PAYMENT_NOTES\	Notes about payment.
\TOTAL_PAID\ \TOTAL\	Total paid (in client's currency).
\TOTAL_PAID_BASE\	Total paid (in base currency).
\PAYMENT_RATE\	Exchange rate.
\NOT_LINKED\	Amount not linked with invoices.
\LINKED\	Amount linked with invoices.
\IS_LINKED\	Used in algorithms (If payment is linked with invoice = True, if it's not = False).
\PAYMENT_NOTES\ \NOTES\	Payment notes.

Linked invoice variables

Code to paste to template	Information to be displayed in the saved document
\DTLINKINVOICES:IDATE\	Linked invoice date.
\DTLINKINVOICES:ICODE\	Linked invoice code.
\DTLINKINVOICES:GNUMB\	Linked invoice global code.
\DTLINKINVOICES:TOTAL\	Linked invoice total.
\DTLINKINVOICES:OTHER\	The part of the linked invoice total covered

	by other payments.
\DTLINKINVOICES:ADJUST\	The sum of the phantom payment of the linked invoice.
\DTLINKINVOICES:LINKED\	The part of the current payment total linked to the invoice.
\DTLINKINVOICES:BALANCE\	Balance Due of the linked invoice.
\DTLINKINVOICES:DATEDUE\	Linked invoice due date.

8.11 PO Template Variables

Date and code

Code to paste to template	Information to be displayed in the saved document
\STATUS\	PO status (overdue, settled (with date), outstanding and so on.).
\DATE_DUE\ \DATE_DUE_LONG\	Due date (according to the payment terms)
\PO_DATE\	The date when the PO was issued in the following format: 10/4/2006
\PO_DATE_LONG\	The date when the PO was issued in long format: Monday, October 04, 2006
\PO_CODE\	PO code
\PO_GLOBAL_CODE\	PO global code

PO totals

Code to paste to template	Information to be displayed in the saved document
\JOBS_TOTAL\	Jobs total for the jobs included to the PO in freelancer's currency
\NET_JOBS_TOTAL\	Net Jobs Total (Jobs Total after the discounts/markups are applied) in freelancer's currency
\NET_JOBS_TOTAL_B\	Net Jobs Total (Jobs Total after the discounts/markups are applied) in base currency
\PO_TOTAL\	PO Total value in freelancer's currency
\PO_TOTAL_BASE\	PO Total value in base currency

PO taxes

Code to paste to template	Information to be displayed in the saved document

\TAX1\	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\	Tax 1 name
\TAX1_VALUE\	Tax 1 value in freelancer's currency
\TAX1_VALUE_B\	Tax 1 value in base currency
\TAX2\	Indicates if the tax 2 has been added; used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\	Tax 2 name
\TAX2_VALUE\	Tax 2 value in freelancer's currency
\TAX2_VALUE_B\	Tax 2 value in base currency
\TAXES\	Indicates if the taxes in the Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in freelancer's currency after Tax 1 applied
\AFTER_TAX1_B\	Total in base currency after Tax 1 applied

PO discounts

Code to paste to template	Information to be displayed in the saved document
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_VALUE\	Discount 1 value in freelancer's currency
\DISCOUNT1_VALUE_B\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_VALUE\	Discount 2 value in freelancer's currency

\DISCOUNT2_VALUE_B\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the Discount/Markup fields are set; used in algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total in freelancer's currency after Discount 1 applied
\AFTER_DISCOUNT1_B\	Total in base currency after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts in freelancer's currency
\NET_JOBS_TOTAL_B\	Jobs total with discounts in base currency

PO payment status

Code to paste to template	Information to be displayed in the saved document
\PO_DUE\	Balance due in freelancer's currency
\PO_DUE_BASE\	Balance due in base currency
\PO_PAID\	Total payments linked to this PO in freelancer's currency
\PO_PAID_BASE\ \TOTAL_PAID_BASE\	Total payments linked to this PO in base currency
\PAYMENT_RATE\	Exchange rate of a payment
\PO_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)
\PO_TOTAL\	PO Total value
\PO_TOTAL_BASE\	PO Total in Base currency
\BEFORE_ADJUSTMENTS\	Invoice total in freelancer's currency, excluding adjustments
\BEFORE_ADJUSTMENTS_B\	Invoice total in base currency, excluding adjustments
\ADJUSTMENTS_VALUE\	Value of the adjustments in freelancer's currency
\ADJUSTMENTS_VALUE_B\	Value of the adjustments in base currency

\INVOICE_IS_RECEIVED\	Indicates if the invoice from the expert was received; Boolean type: True if the Expert Invoice received option is selected.
\INVOICE_CODE\	The code of the expert's invoice
\INVOICE_DATE\	The date the expert's invoice was received
\INVOICE_DATE_LONG\	The date the expert's invoice was received in long format `Monday, October 04, 2006`
\PO_NOTES\	The text entered on the Notes tab of the New/Edit PO window

PO jobs variables

Code to paste to template	Information to be displayed in the saved document
\dtLinkJobs:RJOB_NAME\	Name of the job
\dtLinkJobs:RJOB_ASSIGNED\	Date of the job assignment
\dtLinkJobs:RJOB_DEADLINE\	Deadline date of the job
\dtLinkJobs:RJOB_ISCOMPLETED\	Indicates if the job was is completed; Boolean type: True if the job is completed
\dtLinkJobs:RJOB_COMPLETED\	Date of the job completion
\dtLinkJobs:RJOB_PRICE\	Price of the job
\dtLinkJobs:RJOB_VOLUME\	The job volume
\dtLinkJobs:RJOB_FEE_KIND\	Fee type for the job
\dtLinkJobs:RJOB_RATE\	Exchange rate between expert's and base currency
\dtLinkJobs:RJOB_TOTAL\	Job total in freelancer's currency
\dtLinkJobs:RJOB_TOTAL_B\	Job total, in base currency
\dtLinkJobs:RJOB_QUALITY\	Job quality, as specified in the **New/Edit** Job window
\dtLinkJobs:RJOB_INSTRUCTION\	Text entered on the **Instructions** tab of the **New/Edit** Job window
\dtLinkJobs:RJOB_WORKNOTES\	Text entered on the **Work Notes** tab of the **New/Edit** Job window

\dtLinkJobs:RJOB_COUNTNOTES\	Text from the **Count Notes** tab of the **New/ Edit** Job window
\dtLinkJobs:GROUP_NAME\	The job's group of service name
\dtLinkJobs:SERV_NAME\	The job's service name
\dtLinkJobs:UNIT_NAME\	The units the job is measured in.
\dtLinkJobs:PROJ_CODE\	The code of the project the job belongs to.
\dtLinkJobs:RJOB_CODE\	Job code

These variables can add information from linked payments to purchase order template

Payment PO variables

Code to paste to template	Information to be displayed in the saved document
\dtLinkPayments:LINK_SUM\	The amount linked with the PO
\dtLinkPayments:PAYM_DATE\	Payment date
\dtLinkPayments:RPAYM_TOTAL\	Payment total value
\dtLinkPayments:RPAYM_CODE\	Payment code