DEEP SPACE™

Out-of-the-box Document Templates

The standard templates every Horizon workspace gets automatically, what each one prints, and how they stay up to date

Deep Space Horizon · Commercial & Procurement · September 2026

Every workspace starts with a standard set of **document templates** (the layout of each PDF) and **email templates** (the message a document is sent with). You don't need to build anything before you can generate a progress claim, a payment schedule or a purchase order: Deep Space creates the standard templates for you, fills them from the record and your Company Settings, and keeps them current until you change them.

This guide lists every standard template, shows page 1 of each one filled with **sample data**, and explains how seeding works so you know what happens to your own edited copies. For how to edit, generate and send, see the *Document Templates* guide.

1. How the standard templates are created

When	What happens
Opening Admin → Document Templates	Once per visit, after the workspace's templates have loaded, Deep Space checks every standard type. A type with **no Published template** gets the standard copy (Published, ready to use), together with its email template if that is missing too. Purchase orders and subcontract agreements are the exception: Deep Space looks for its own standard copy by name, so that copy is added even when you already have other templates of the type.
Using a register	Some registers make sure their own template exists at the moment you need it: Purchase Orders (register and Send), Invoices (to Client), Variations (client side) and the Subcontract Agreement tab and Send screen. Sending a subcontract for signature, resending an executed agreement or sending a PO for e-signature creates the matching email template the first time.
Nothing is duplicated	A standard copy is created only when the workspace has no Published template of that type, so if you already have your own, no standard copy is added (except for purchase orders and subcontract agreements, as above). Duplicate standard copies left over from older versions are tidied away when an administrator opens Document Templates; distinct templates of the same type are always kept.

Version tags keep unedited copies current

Each standard copy carries a tag such as `content_version:v13`. When Deep Space improves a standard layout, the version number goes up. The next time Document Templates is opened, every copy that is **still unedited** and has an older tag is updated in place to the new layout.

The **Progress Claim PDF**, **SC Progress Claim** and the **client Payment Schedules** go one step further: while your copy is unedited, documents are rendered from the current layout even before the stored copy is refreshed.

Your edits are never overwritten. Saving a change to a standard template in the editor removes its `content_version:` tag. From then on the template is yours: updates to the standard layout skip it, and it renders exactly as you saved it. The same applies to a template you cloned, uploaded as Word, or converted to Word. None of these carry the tag.

Which template a document uses

1. The template marked **Assigned** for that document type, if there is one.
2. Otherwise, the most recently published template of that type (the standard copy, unless you have published another), labelled *Default (newest published)*.
3. For a purchase order or subcontract agreement with no template at all, Deep Space's built-in layout.

Every picker also shows templates added with **Add to picker** next to the default, and every other Published template behind *Use a different template (N)*. Drafts are never offered.

Standard copies are **not** marked Assigned. Publishing a second template of the same type with nothing assigned would change the default, so Deep Space warns you when you publish in that situation.

Some workspaces have tailored variants of the standard templates (for example their own letterhead or contract terms) that are seeded and assigned for that workspace only. They follow the same rules: kept current while unedited, never overwritten once edited.

2. The standard set at a glance

Document type	Template title	Version	Orientation	Where it's used
Progress Claim PDF	HC Progress Claim	`v13`	Portrait	Progress Claims to Client → Generate / Generate & Send / Serve
Payment Schedule (AU)	Client Payment Schedule (AU)	`v5`	Portrait	Client Payment Schedules (received) → Generate
Payment Schedule (NZ)	Client Payment Schedule (NZ)	`v4`	Portrait	Client Payment Schedules (received) → Generate
Tax Invoice	Head Contract Tax Invoice	`v4`	Portrait	Invoices (to Client) → Generate / Send
Variation Order	Head Contract Variation Order	`v9`	Portrait	Variations (client side) → Generate / Generate & Send
HC Progress Claim (tax-invoice layout)	Head Contract Progress Claim	`v9`	Portrait	Not offered on a register yet (preview in Document Templates)
Subcontract Agreement	Subcontract Agreement	`v3`	Portrait	Subcontract Register → send for signature / Download
SC Progress Claim	SC Progress Claim	`v3`	Portrait	Progress Claims from Subcontractors → Generate
Payment Schedule (AU)	Subcontractor Payment Schedule (AU)	`v11`	Landscape	Payment Schedules (Issued) → Generate / Send / Attach / on Accept
Payment Schedule (NZ)	Subcontractor Payment Schedule (NZ)	`v13`	Landscape	Payment Schedules (Issued) → Generate / Send / Attach / on Accept

RCTI	Subcontractor RCTI	`v6`	Portrait	Payment Schedules (Issued), when the subcontract's tax mode is RCTI
BCTI	Subcontractor BCTI	`v4`	Portrait	Payment Schedules (Issued), when the subcontract's tax mode is BCTI
Subcontract Variation	Subcontract Variation	`v3`	Portrait	Subcontract Variations → Generate / Generate & Send
Purchase Order	Purchase Order	`v1`	Portrait	Purchase Orders → Download as PDF / Send to Supplier

All standard templates are HTML templates. You can make a Word copy of any of them with **Convert to Word** (see section 6).

3. What fills a template

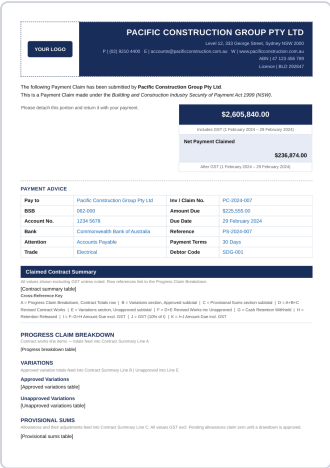
- **The record:** claim, schedule, variation, invoice, subcontract or PO values, including the generated tables (line items, variations, breakdowns).
- **Company Settings:** legal name, ABN or GST number, address, phone, email, website, contractor licence, logo, bank details, Approver Name and the Security of Payment state. Each type's section below lists what it prints. Before producing a document, Deep Space checks that the Company Settings values it prints are filled in; if one is missing, it names it and nothing is produced or sent (the *Document Templates* guide lists what each type requires). Website, bank name, SWIFT, contractor licence and logo never block.
- **The contract's state:** documents that cite the Security of Payment Act use the contract's state where it is set, and your Company Settings state otherwise. The subcontract variation's statutory declaration names that state's declarations act (for example *Oaths Act 1900 (NSW)*; the ACT uses the Commonwealth act, New Zealand the *Oaths and Declarations Act 1957*).

The thumbnails in this guide are filled with the same **sample data** the template editor's preview uses, with a few example table rows. Where a type shows a second, **real output** image, it is the top of page 1 of a document produced by the released product in a Deep Space test workspace. Your documents show your own records.

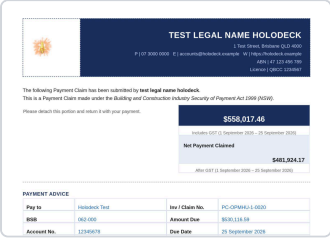
Head contract (your client)

Progress Claim PDF — HC Progress Claim

`head_contract_claim_pdf` · `content_version:v13` · HTML · Portrait



Sample data Page 1



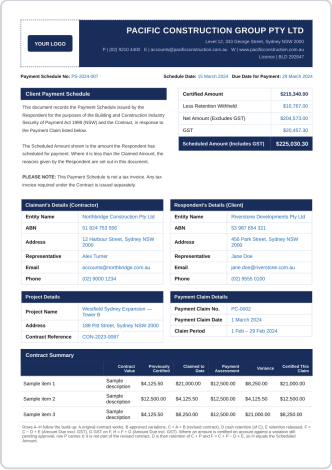
Real output Top of page 1, test workspace

The payment claim you serve on your client. The cover shows the gross amount claimed and the net payment claimed, a Payment Advice block (bank details, amount due, due date), then the contract summary ladder (rows A–K), the progress breakdown, variations, provisional sums, attachments and the contractor's declaration under your Security of Payment Act.

Where it's used	Progress Claims to Client → Generate / Generate & Send / Serve
Prints, in order	Letterhead → Claim Cover → Claimed Contract Summary → Progress Claim Breakdown → Variations → Provisional Sums → Attachments → Contractor Declaration
Key variables	`${gross_claim_inc_gst}`, `${claim_period_from}`, `${claim_period_to}`, `${net_payment_claimed}`, `${claim_number}`, `${amount_due_inc_gst}`, `${claim_date}`, `${payment_reference}`
Company Settings	ABN / GST number, Address, Bank (BSB), Bank (account), Bank account name, Bank name, Contractor licence, Email, Legal name, Logo, Phone, Security of Payment state, Website
Email subject	Progress Claim `${claim_number}` – `${project_name}` | Submitted for Certification
Note	Renders from the current layout automatically while your copy is unedited, so layout fixes reach you without a re-seed.

Payment Schedule (AU) — Client Payment Schedule (AU)

`head_contract_payment_schedule_pdf` · `content_version:v5` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

Client Payment Schedule

Claimant's Details (Contractor)

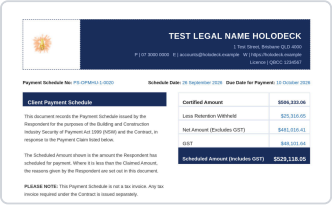
Respondent's Details (Client)

Project Details

Payment Claim Details

Contract Summary

Sample data Page 1


TEST LEGAL NAME HOLODECK

Client Payment Schedule

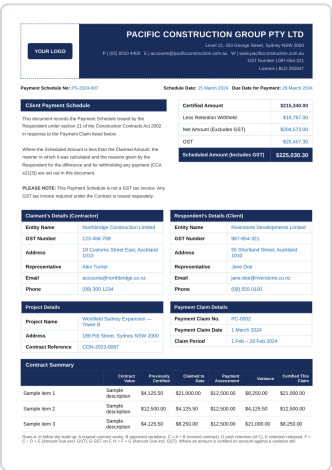
Real output Top of page 1, test workspace

The payment schedule your client issues in response to your claim, recorded in Deep Space: the SOPA statement and scheduled amount, claimant and respondent details, project and claim details, the contract summary, variations, deductions, the schedule breakdown, attachments and reasons for any difference.

Where it's used	Client Payment Schedules (received) → Generate
Prints, in order	Letterhead → Payment Schedule Statement & Amounts → Claimant & Respondent Details → Project & Payment Claim Details → Contract Summary → Variations → Deductions & Withholdings → Payment Schedule Breakdown → Attachments → Reasons for Difference
Key variables	`${payment_schedule_id}`, `${issue_date}`, `${due_date_for_payment}`, `${statutory_basis}`, `${approved_amount}`, `${retention_withheld}`, `${net_amount_ex_gst}`, `${gst_amount}`
Company Settings	Address, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Payment Schedule `${payment_schedule_id}` – `${project_name}`
Note	Used when the head contract's Region is in Australia (or, with no Region, when your company is Australian).

Payment Schedule (NZ) — Client Payment Schedule (NZ)

`head_contract_payment_schedule_pdf_nz` · `content_version:v4` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

Client Payment Schedule

Claimant's Details (Contractor)

Respondent's Details (Client)

Project Details

Payment Claim Details

Contract Summary

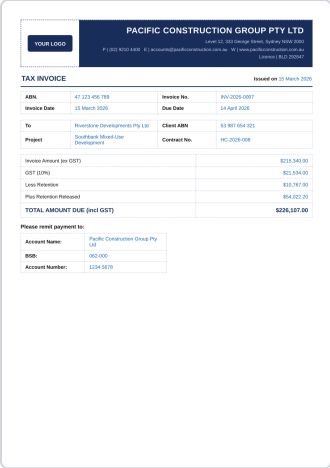
Sample data Page 1

The New Zealand version of the client payment schedule, with Construction Contracts Act (CCA) wording and GST numbers instead of ABNs.

Where it's used	Client Payment Schedules (received) → Generate
Prints, in order	Letterhead → CCA Statement & Amounts → Claimant & Respondent Details → Project & Payment Claim Details → Contract Summary → Variations → Deductions & Withholdings → Payment Schedule Breakdown → Attachments → Reasons for Difference
Key variables	`${payment_schedule_number}`, `${issue_date}`, `${due_date_for_payment}`, `${approved_amount}`, `${retention_withheld}`, `${net_amount_ex_gst}`, `${gst_amount}`, `${scheduled_amount_inc_gst}`
Company Settings	ABN / GST number, Address, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Payment Schedule `${payment_schedule_number}` – `${project_name}`
Note	Used when the head contract's Region is in New Zealand.

Tax Invoice — Head Contract Tax Invoice

`head_contract_tax_invoice` · `content_version:v4` · HTML · Portrait



A tax invoice to your client: invoice number and dates, client details, the invoice amount with GST and retention lines, and your bank details for payment.

Where it's used	Invoices (to Client) → Generate / Send
Prints, in order	Letterhead → Invoice Title → Invoice Details → Client Details → Invoice Amount → Payment Details
Key variables	`${issue_date}`, `${invoice_number}`, `${invoice_date}`, `${due_date}`, `${client_name}`, `${client_abn}`, `${project_name}`, `${contract_number}`
Company Settings	ABN / GST number, Address, Bank (BSB), Bank (account), Bank account name, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Tax Invoice `${invoice_number}` – `${project_name}`

Sample data Page 1



Real output Top of page 1, test workspace

Variation Order — Head Contract Variation Order

`head_contract_variation` · `content_version:v9` · HTML · Portrait



A variation order for your client: project header, to/from, variation details, description and reason, line items and totals, the effect on the contract sum, any provisional-sum adjustment, extension of time, commercial terms, attachments and signature blocks.

Where it's used	Variations (client side) → Generate / Generate & Send
Prints, in order	Letterhead → Project Header → Variation Title → To / From → Variation Details → Description & Reason → Line Items → Totals → Effect on Contract Sum → Provisional Sum Adjustment → Extension of Time → Commercial Terms → Attachments → Signatures
Key variables	`${project_name}`, `${project_address}`, `${variation_number}`, `${status}`, `${client_name}`, `${issue_date}`, `${variation_type}`, `${contract_number}`
Company Settings	Address, Approver Name, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Variation Order `${variation_number}` – `${project_name}`
Note	Attachments and a T&Cs file you add to the variation are bound in at the end.

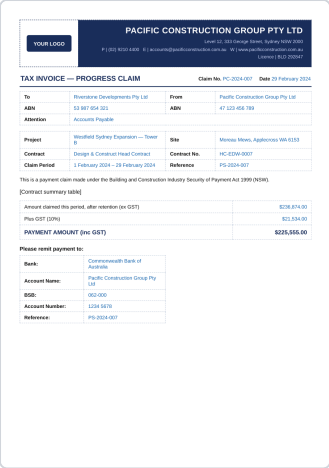
Sample data Page 1



Real output Top of page 1, test workspace

HC Progress Claim (tax-invoice layout) — Head Contract Progress Claim

`head_contract_progress_claim` · `content_version:v9` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

TAX INVOICE — PROGRESS CLAIM

Claim No. PC-2024-007 Date 29 February 2024

To	Riverstone Developments Pty Ltd	From	Pacific Construction Group Pty Ltd
ABN	53 987 654 321	ABN	47 123 456 789
Attention	Accounts Payable		
Project	Woodfield Sydney Expansion — Tower B	Site	Moreau Mews, Applecross WA 6153
Contract	Design & Construct Head Contract	Contract No.	HC-EDW-0007
Claim Period	1 February 2024 – 29 February 2024	Reference	PS-2024-007

This is a payment claim made under the Building and Construction Industry Security of Payment Act 1999 (NSW).

[Contract summary table]

Amount claimed this period, after retention (ex GST)	$228,874.00
Plus GST (10%)	$22,534.00
PAYMENT AMOUNT (inc GST)	$225,555.00

Please remit payment to:

Bank:	Commonwealth Bank of Australia
Account Name:	Pacific Construction Group Pty Ltd
BSB:	062-000
Account Number:	1234 5670
Reference:	PS-2024-007

Sample data Page 1

A one-page client tax invoice for a progress claim (“Tax Invoice — Progress Claim”): claim number and date, To/From with both ABNs, attention, project and contract, the claim period, the amounts claimed with GST, and your payment details.

Where it’s used	Not offered on a register yet (preview in Document Templates)
Prints, in order	Letterhead → Invoice Title → Parties → Contract & Claim Details → Claim Summary → Bank Details
Key variables	`${claim_number}`, `${claim_date}`, `${client_name}`, `${client_abn}`, `${attention}`, `${project_name}`, `${site_address}`, `${contract_name}`
Company Settings	ABN / GST number, Address, Bank (BSB), Bank (account), Bank account name, Bank name, Contractor licence, Email, Legal name, Logo, Phone, Security of Payment state, Website
Email subject	Progress Claim `${claim_number}` – `${project_name}`
Note	No register offers it yet; progress claims are produced with the Progress Claim PDF above.

Subcontract (your subcontractors)

Subcontract Agreement — Subcontract Agreement

`subcontract_agreement` · `content_version:v3` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

STRUCTURAL STEEL SUPPLY & INSTALL SUBCONTRACT

SCOPE OF WORKS

SCHEDULE OF RATES (HOURLY RATE WORK)

ANNEXURE A — CONTRACT PARTICULARS

SCHEDULE OF VALUES

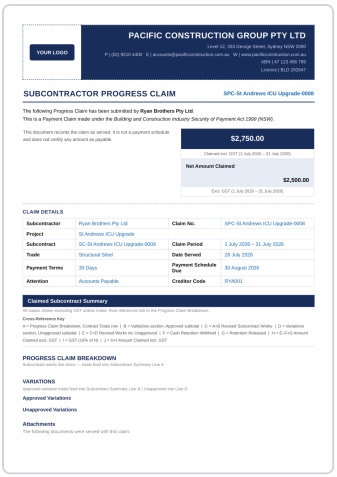
Sample data Page 1

The body of the subcontract pack: letterhead, contract header (parties, dates, status), scope of works, schedule of rates, Annexure A contract particulars and the schedule of values. Deep Space adds the cover and execution page around it.

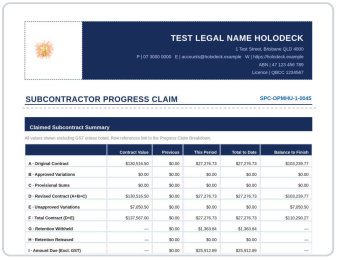
Where it’s used	Subcontract Register → send for signature / Download
Prints, in order	Letterhead → Contract Header → Scope of Works → Schedule of Rates → Annexure A — Contract Particulars → Schedule of Values
Key variables	`${contract_name}`, `${date_created}`, `${site_address}`, `${subcontractor_block}`, `${created_by_block}`, `${contract_status}`, `${executed}`, `${signed_contract_received_date}`
Company Settings	ABN / GST number, Address, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Subcontract Agreement `${subcontract_sc_number}` – `${subcontract_project}` | Action Required: Signature
Note	If no Subcontract Agreement template exists, Deep Space uses its built-in layout.

SC Progress Claim — SC Progress Claim

`subcontract_claim_pdf` · `content_version:v3` · HTML · Portrait



Sample data Page 1



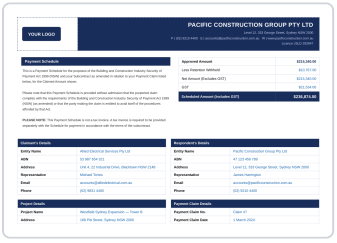
Real output Top of page 1, test workspace

A formatted record of a subcontractor's claim: the claim cover with amounts claimed, claim details (served date, payment schedule due date), the claimed subcontract summary, the breakdown, variations, attachments and your receipt and assessment.

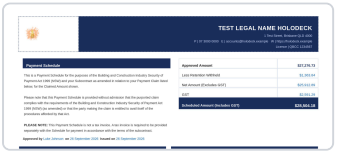
Where it's used	Progress Claims from Subcontractors → Generate
Prints, in order	Letterhead → Claim Cover → Claimed Subcontract Summary → Progress Claim Breakdown → Variations → Attachments → Receipt & Assessment
Key variables	`${claim_number}`, `${subcontractor_name}`, `${gross_claim_inc_gst}`, `${claim_period_from}`, `${claim_period_to}`, `${net_payment_claimed}`, `${project_name}`, `${contract_reference}`
Company Settings	ABN / GST number, Address, Contractor licence, Email, Legal name, Logo, Phone, Security of Payment state, Website
Email subject	Progress Claim `${claim_number}` received – `${project_name}`
Note	Renders from the current layout automatically while your copy is unedited.

Payment Schedule (AU) — Subcontractor Payment Schedule (AU)

`subcontract_payment_schedule_pdf` · `content_version:v11` · HTML · Landscape



Sample data Page 1



Real output Top of page 1, test workspace

The payment schedule you issue to a subcontractor under the Security of Payment Act: statement and scheduled amount, claimant and respondent details, project and claim details, the subcontract summary, variations, deductions and withholdings, the schedule breakdown, attachments and reasons for difference.

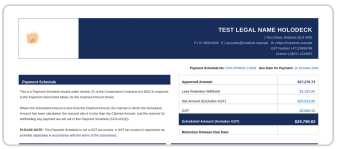
Where it's used	Payment Schedules (Issued) → Generate / Send / Attach / on Accept
Prints, in order	Letterhead → SOPA Statement & Amounts → Claimant & Respondent Details → Project & Payment Claim Details → Subcontract Summary → Variations → Deductions & Withholdings → Payment Schedule Breakdown → Attachments → Reasons for Difference
Key variables	`${approved_amount}`, `${retention_withheld}`, `${net_amount_ex_gst}`, `${gst_amount}`, `${scheduled_amount_inc_gst}`, `${claimant_name}`, `${claimant_abn}`, `${claimant_address}`
Company Settings	Address, Contractor licence, Email, Legal name, Logo, Phone, Security of Payment state, Website
Email subject	Payment Schedule `${payment_schedule_id}` – `${project_name}`
Note	Prints landscape while it carries the wide 16-column backup sheet.

Payment Schedule (NZ) — Subcontractor Payment Schedule (NZ)

`subcontract_payment_schedule_pdf_nz` · `content_version:v13` · HTML · Landscape



Sample data Page 1



Real output Top of page 1, test workspace

The New Zealand version, with Construction Contracts Act wording and GST numbers.

Where it's used	Payment Schedules (Issued) → Generate / Send / Attach / on Accept
Prints, in order	Letterhead → CCA Statement & Amounts → Claimant & Respondent Details → Project & Payment Claim Details → Subcontract Summary → Variations → Deductions & Withholdings → Payment Schedule Breakdown → Attachments → Reasons for Difference
Key variables	`${payment_schedule_number}`, `${due_date_for_payment}`, `${approved_amount}`, `${retention_withheld}`, `${net_amount_ex_gst}`, `${gst_amount}`, `${scheduled_amount_inc_gst}`, `${retention_release_due_date}`
Company Settings	ABN / GST number, Address, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Payment Schedule `${payment_schedule_id}` – `${project_name}`
Note	Used when the subcontract's jurisdiction is New Zealand. Landscape while it carries the wide backup sheet.

RCTI — Subcontractor RCTI

`subcontract_rcti` · `content_version:v6` · HTML · Portrait



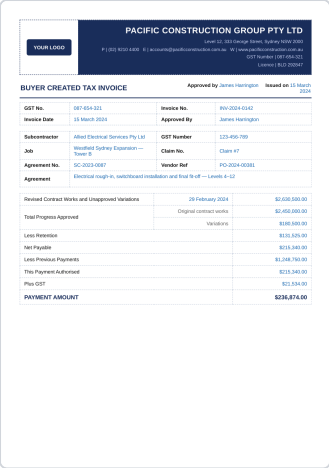
Sample data Page 1

A recipient-created tax invoice issued on the subcontractor's behalf: your details and ABN, invoice number and dates, the subcontractor's details, and the payment ladder from contract works through retention, previous payments and GST to the payment amount.

Where it's used	Payment Schedules (Issued), when the subcontract's tax mode is RCTI
Prints, in order	Letterhead → Invoice Title → ABN & Invoice Info → Subcontractor Details → Financial Summary
Key variables	`${issue_date}`, `${invoice_number}`, `${invoice_date}`, `${subcontractor_name}`, `${subcontractor_abn}`, `${project_name}`, `${claim_number}`, `${agreement_number}`
Company Settings	ABN / GST number, Address, Approver Name, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Payment Schedule `${payment_schedule_id}` – `${project_name}` | RCTI Issued
Note	Needs the Approver Name in Company Settings, and is never produced from a payment schedule that is still Draft.

BCTI — Subcontractor BCTI

`subcontract_bcti` · `content_version:v4` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

BUYER CREATED TAX INVOICE

Approved by James Harrington Issued on 15 March 2024

GST No.	087-654-321	Invoice No.	INV-2024-0142
Invoice Date	15 March 2024	Approved By	James Harrington
Subcontractor	Allied Electrical Services Pty Ltd	GST Number	123-456-789
Job	Westfield Sydney Expansion — Tower B	Claim No.	Claim #7
Agreement No.	SC-2023-0087	Vendor Ref	PO-2024-00381
Agreement	Electrical rough-in, switchboard installation and final fit-off — Levels 4–12		

Revised Contract Works and Unapproved Variations	29 February 2024	$2,630,500.00
Total Progress Approved	Original contract works	$2,450,000.00
	Variations	$180,500.00
Less Retention		$131,525.00
Net Payable		$215,340.00
Less Previous Payments		$1,248,750.00
This Payment Authorised		$215,340.00
Plus GST		$21,534.00
PAYMENT AMOUNT		$236,874.00

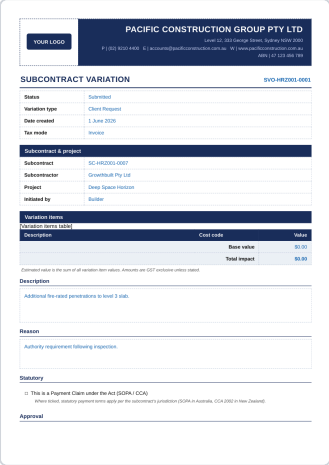
Sample data Page 1

The New Zealand buyer-created tax invoice, with GST numbers instead of ABNs.

Where it's used	Payment Schedules (Issued), when the subcontract's tax mode is BCTI
Prints, in order	Letterhead → Invoice Title → GST Number & Invoice Info → Subcontractor Details → Financial Summary
Key variables	`${issue_date}`, `${invoice_number}`, `${invoice_date}`, `${subcontractor_name}`, `${claimant_gst_number}`, `${project_name}`, `${claim_number}`, `${agreement_number}`
Company Settings	ABN / GST number, Address, Approver Name, Contractor licence, Email, Legal name, Logo, Phone, Website
Email subject	Payment Schedule `${payment_schedule_id}` – `${project_name}` | BCTI Issued
Note	Same rules as the RCTI: Approver Name set, and the schedule issued (not Draft).

Subcontract Variation — Subcontract Variation

`subcontract_variation` · `content_version:v3` · HTML · Portrait


PACIFIC CONSTRUCTION GROUP PTY LTD

SUBCONTRACT VARIATION SVO-HR2001-0001

Status	Submitted
Variation type	Client Request
Date created	1 June 2026
Tax mode	Invoice

Subcontract & project

Subcontract	SC-HR2001-0007
Subcontractor	Growthbuilt Pty Ltd
Project	Deep Space Horizon
Initiated by	Builder

Variation items

Variation items table

Description	Cost code	Value
	Base value	$0.00
	Total impact	$0.00

Estimated value is the sum of all variation item values. Amounts are GST exclusive unless stated.

Description

Additional fire-rated penetrations to level 3 slab.

Reason

Authority requirement following inspection.

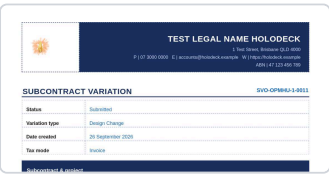
Statutory

☐ This is a Payment Claim under the Act (SOPA / CCA)

Where ticked, statutory payment terms apply per the subcontract's jurisdiction (SOPA in Australia, CCA 2002 in New Zealand).

Approval

Sample data Page 1


TEST LEGAL NAME HOLODECK

SUBCONTRACT VARIATION SVO-OPMHJ-1-0011

Status	Submitted
Variation type	Design Change
Date created	26 September 2026
Tax mode	Invoice

Subcontract & project

Real output Top of page 1, test workspace

A subcontract variation: title and metadata, subcontract and project, variation items and total impact, description, reason, the statutory wording, approval and a statutory declaration.

Where it's used	Subcontract Variations → Generate / Generate & Send
Prints, in order	Letterhead → Title → Variation Metadata → Subcontract & Project → Variation Items → Description → Reason → Statutory → Approval → Statutory Declaration
Key variables	`${variation_number}`, `${status}`, `${variation_type}`, `${date_created}`, `${tax_mode}`, `${subcontract_reference}`, `${subcontractor_name}`, `${project_name}`
Company Settings	ABN / GST number, Address, Email, Legal name, Phone, Security of Payment state, Website
Email subject	Subcontract Variation `${variation_number}` – `${project_name}`

Procurement

Purchase Order — Purchase Order

`purchase_order` · `content_version:v1` · HTML · Portrait


Pacific Construction Group Pty Ltd

PURCHASE ORDER

Site Establishment Materials

Delivery Instructions

Deliver to gate 3, contact site office on arrival.

Scope of Work

Supply of site establishment materials per attached schedule.

Line Items

Description	Cost Code	Qty	Unit	Rate	Amount
22	1 - test dup3	1	EA	$22.00	$22.00

Subtotal (ex GST): $22.00

GST (10%): $2.20

Total (incl GST): $24.20

Attachments

1. An 2030(1).pdf [PDF]

A purchase order: your company header, PO name, bill-to and ship-to, order details, delivery instructions, scope of work, line items, totals and attachments.

Where it's used	Purchase Orders → Download as PDF / Send to Supplier
Prints, in order	Header → PO Name → Bill To / Ship To → Purchase Order Details → Delivery Instructions → Scope of Work → Line Items → Totals → Attachments
Key variables	`${po_number}`, `${po_status}`, `${po_date}`, `${po_name}`, `${bill_to_email}`, `${ship_to_address}`, `${supplier_name}`, `${supplier_address}`
Company Settings	ABN / GST number, Address, Legal name, Phone
Email subject	Purchase Order `${purchase_order_po_number}` - `${purchase_order_status}`
Note	PO attachments are bound in unless the template turns this off. If no Purchase Order template exists, the built-in System default layout is used.

Sample data Page 1

4. Standard email templates

Each document type has a standard email that goes with it. `${…}` values are filled from the record when you send. Standard emails follow the same rule as document templates: a missing one is created automatically, and each carries a hidden version marker (shown under the type below), so an **unedited** standard email is refreshed when its wording improves. Saving your own edit in the Email Template Library removes the marker; from then on the email is yours and is never overwritten.

The payment schedule emails no longer say "Issued" in the subject, so they read correctly for a Draft schedule too. The subcontract signature request signs off with the sender's name and your Company Settings legal name, and points to the signing link, where the full agreement pack can be read and downloaded.

Email type	Subject	Used for
`head_contract_claim_pdf` hcpc-email-v1	Progress Claim `${claim_number}` – `${project_name}` | Submitted for Certification	Generate & Send or Serve of a progress claim
`head_contract_payment_schedule_pdf` hcps-email-v1	Payment Schedule `${payment_schedule_id}` – `${project_name}`	Send of a client payment schedule (AU)
`head_contract_payment_schedule_pdf_nz` hcps-nz-email-v1	Payment Schedule `${payment_schedule_number}` – `${project_name}`	Send of a client payment schedule (NZ)
`head_contract_tax_invoice` hc-invoice-email-v1	Tax Invoice `${invoice_number}` – `${project_name}`	Send of a tax invoice to your client

`head_contract_variation` hcv-email-v1	Variation Order `${variation_number}` – `${project_name}`	Generate & Send of a client variation
`head_contract_progress_claim` hc-claim-email-v2	Progress Claim `${claim_number}` – `${project_name}`	The claim tax-invoice layout (not on a register yet)
`subcontract_agreement` sc-agreement-email-v2	Subcontract Agreement `${subcontract_sc_number}` – `${subcontract_project}` | Action Required: Signature	Send for Execution (signature request). Created the first time you send one
`subcontract_claim_pdf` scpc-email-v1	Progress Claim `${claim_number}` received – `${project_name}`	Acknowledging a subcontractor's claim
`subcontract_payment_schedule_pdf` sps-email-v2	Payment Schedule `${payment_schedule_id}` – `${project_name}`	Issuing an AU payment schedule (Send, or automatically on Accept)
`subcontract_payment_schedule_pdf_nz` sps-nz-email-v2	Payment Schedule `${payment_schedule_id}` – `${project_name}`	Issuing an NZ payment schedule
`subcontract_rcti` rcti-email-v1	Payment Schedule `${payment_schedule_id}` – `${project_name}` | RCTI Issued	Sending an RCTI
`subcontract_bcti` bcti-email-v1	Payment Schedule `${payment_schedule_id}` – `${project_name}` | BCTI Issued	Sending a BCTI
`subcontract_variation` scv-email-v1	Subcontract Variation `${variation_number}` – `${project_name}`	Generate & Send of a subcontract variation
`purchase_order` —	Purchase Order `${purchase_order_po_number}` - `${purchase_order_status}`	Send to Supplier
`subcontract_agreement_executed` sc-agreement-executed-email-v1	Executed Subcontract Agreement `${subcontract_sc_number}` – `${subcontract_project}`	Resend Agreement on an executed subcontract. Created the first time you use it
`purchase_order_esign`	Purchase Order `${purchase_order_po_number}` – `${purchase_order_project}` | Action Required: Signature	Send for E-Signature on a PO. Created the first time you use it

5. The claim tax-invoice layout

The **HC Progress Claim (tax-invoice layout)** type, titled *Head Contract Progress Claim*, is a one-page client tax invoice for a progress claim. It is created in every workspace, but no register offers it yet, so you can only preview it (Sample PDF). Progress claims to your client use the **Progress Claim PDF**. You can leave it or archive it; it has no effect on your documents.

6. Customising safely

To…	Do this	What happens on updates
Change a layout	**Clone & Edit** the standard template, edit the copy, publish it and mark it **Assigned**.	Your copy is never touched. The standard copy keeps updating alongside it.
Work in Word	**Convert to Word** on the template card makes a Draft Word copy with the logo embedded and the same `${variables}`; download it, edit it in Word, upload it and publish.	Word copies are yours and are never updated. Convert again to pick up a newer standard layout.
Edit the standard copy itself	Allowed, but saving makes it yours.	It stops receiving standard updates.
Go back to standard	Unassign or archive your copy. If the standard copy is still Published it is used again; if you archived every template of the type, a fresh standard copy is created the next time Document Templates is opened.	—

Before relying on a customised template, generate one real document from it and check every value. A variable that belongs to another document type prints blank.

Describes Deep Space Horizon as released on 27 September 2026 (web 968ba14). Standard template versions change as layouts improve; the Admin → Document Templates screen always shows the current set for your workspace.