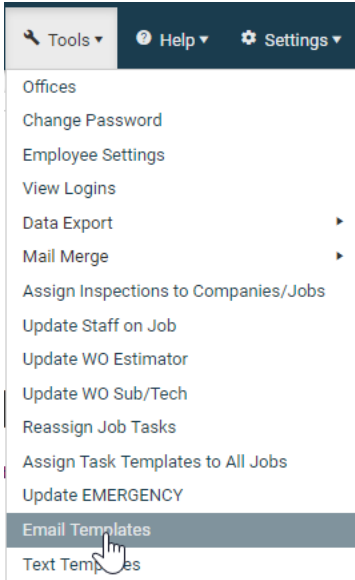


Email Template – Setup

Email Templates can be used in the following pages Notifications, Task Templates, Reminders, and Mail Merge. They can also be selected when sending an email from Job, Company, and Sub/Tech Correspondence, also when emailing a Work Order.

To add and/or edit an Email Template in Restoration Manager, go to Tools → Email Templates



After selecting Email Templates; Template, Subject, Sequence, Use HTML, Status, Fields, and Available in all Offices will be displayed.

Template:

Subject:

Sequence: Use HTML: Status:

Verdana, ... Size Aa aA

Fields:

Available in all Sites

Email Template – Setup

To create a new email template.

Apply the **Subject** this is description of template and will appear in the drop down to select from.

Subject:

Add the **Sequence** (if applicable) this is the order number the template will display within the drop down.

Sequence:

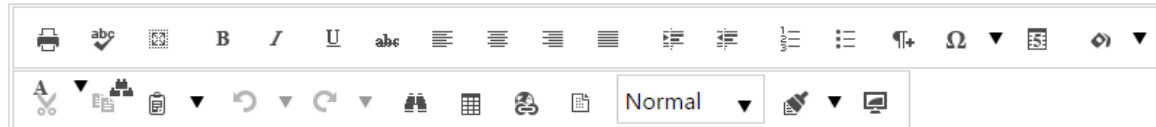
Add your message within the body of the email begin typing by placing your cursor in the text box. You can also add an existing letter by copying and pasting it directly into the box. To apply merge fields while you're creating your template select the Field and then the merge fields will display to choose from.

Note: There are seven (7) Fields to select from each field will load the merge fields that can be applied.

Template:

Subject:

Sequence: Use HTML: Status:



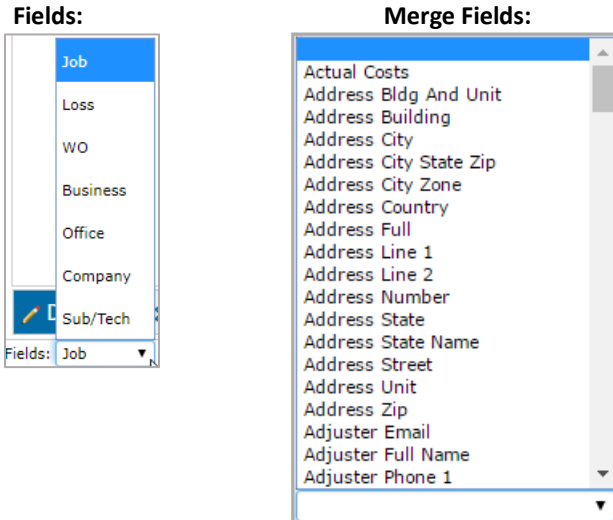
Verdana, ...

Fields:

Available in all Sites

Email Template – Setup

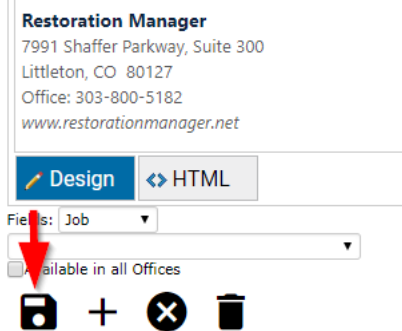
The Fields are as follows; Job, Loss, WO, Business, Office, Company and Sub/Tech.



Important: The Fields, Merge Fields and Definitions are available on pages 6-15

Available in all Offices: Check this box if your application has more than one Office and this template will be used within all Offices.

Next click save to save the template



Other options; **Save As New** select this option if you're using an existing template as a base to create another template so you don't override the existing template. **Cancel** to cancel the template changes. Click **Delete** to remove an existing template.



Email Template – Setup

To edit an existing template, select the template from the drop down. Make the necessary changes then click save which saves the changes without creating a new template.

The easiest way to create a new template is to choose an existing template from the drop down. Change the Subject to reflect the new template name, make the necessary changes within the body of the template then click Save as New the + icon. The existing template will not be changed, and the new template will be created.

Template: [Vendor Name] Work Order ***SCHEDULED REMINDER***
Subject: [Vendor Name] Work Order ***SCHEDULED REMINDER***
Sequence: 0 Use HTML: Status: Active

Design HTML

Fields: Job

Available All Offices

Save + Cancel Delete

Design Mode Content:

Hello:

This is a reminder that the following work has been scheduled for **[Date Vendor Scheduled]** at **[Date Vendor Scheduled Time]**

Work needs to be performed: [Category]/[Sub Category]
[Service Request]

The job contacts are [Primary Contact Full Name], [Secondary Contact Full Name]
The Job is located at: **[Address Line 1]** **[Address City]**, **[Address State]** **[Address Zip]**

If there is an issue with the schedule or you have any questions please contact [Staff Full Name] at [Staff Phone 1]. Thank you!



Email Template – Setup

Merge Fields and Definitions

Below is a description of what each merge field represents. Please note some of the merge fields are terminology driven and you may be using a different terminology than noted in the merge field and definitions below.

Job Merge Fields

Merge Field

Actual Costs
 Address Bldg And Unit
 Address Building
 Address City
 Address City State Zip
 Address City Zone
 Address Country
 Address Full
 Address Line 1
 Address Line 2
 Address Number
 Address State
 Address State Name
 Address Street
 Address Unit
 Address Zip
 Adjustor Email
 Adjustor Full Name
 Adjustor Phone 1
 Adjustor Phone 1 Type
 Adjustor Phone 2
 Adjustor Phone 2 Type
 Adjustor Project
 Adjustor Type
 Agent Email
 Agent Full Address
 Agent Full Name
 Agent Phone 1
 Agent Phone 1 Type
 Agent Phone 2
 Agent Phone 2 Type
 Agent Project
 Agent Type
 Billing Contact Address 1
 Billing Contact Address 2
 Billing Contact City, State, Zip
 Billing Contact Email
 Billing Contact Full Name
 Billing Contact Phone 1
 Billing Contact Phone 1 Type
 Billing Contact Phone 2
 Billing Contact Phone 2 Type
 Current Date
 Customer Contact Type
 Customer Email
 Customer Full Address
 Customer Full Name
 Customer Phone 1
 Customer Phone 1 Type

Definition

Total Actual Costs for the Job
 Job/Customer Bldg and Unit in one field
 Job/Customer Building details
 Job/Customer City
 Job/Customer City, State & Zip
 Job/Customer City Zone
 Job/Customer Country
 Job/Customer Full address in one field
 Job/Customer Address 1
 Job/Customer Address 2
 Job/Customer Address 1 Number
 Job/Customer State
 Job/Customer State Name
 Job/Customer Address 1 Street Name
 Job/Customer Unit
 Job/Customer Zip
 Adjuster Email Address
 Adjuster Full Name
 Adjuster Phone Number in Phone field 1
 Adjuster Type of Number associated with Phone field 1
 Adjuster Phone Number in Phone field 2
 Adjuster Type of Number associated with Phone field 2
 Company the Adjuster works for
 Adjuster Title
 Agent Email Address
 Agent Full Address
 Agent Full Name
 Agent Phone Number in Phone field 1
 Agent Type of Number associated with Phone field 1
 Agent Phone Number in Phone field 1
 Agent Type of Number associated with Phone field 1
 Company the Agent works for
 Agent Title
 Job/Customer Billing Contact Address 1
 Job/Customer Billing Contact Address 2
 Job/Customer Billing Contact City, State & Zip
 Job/Customer Billing Contact Email Address
 Job/Customer Billing Contact Full Name
 Job/Customer Billing Contact Phone Number in Phone field 1
 Job/Customer Billing Contact Type of Number associated with Phone field 1
 Job/Customer Billing Contact Phone Number in Phone field 2
 Job/Customer Billing Contact Type of Number assoc. with Phone field 2
 Current Date
 Defined as Customer - Description
 Defined as Customer – Email
 Defined as Customer – Full Address
 Defined as Customer - Full Name
 Defined as Customer – Phone 1
 Defined as Customer – Phone Type 1



Email Template – Setup

Job Merge Fields - continued

Merge Field

Definition

Customer Phone 2	Defined as Customer – Phone 2
Customer Phone 2 Type	Defined as Customer – Phone Type 2
Customer Project Desc	Defined as Customer - Company
Estimate Costs	Total Estimated costs for the Job
Floor Plan Name	Floor Plan Name
Full Address	Job Full Address
Job Closed	Job Closed (Yes or No)
Job Custom 1	Job Custom field order 1 (Typically Deductible)
Job Custom 10	Job Custom field order 10 (User Definable)
Job Custom 11	Job Custom field order 11 (User Definable)
Job Custom 12	Job Custom field order 12 (User Definable)
Job Custom 13	Job Custom field order 13 (User Definable)
Job Custom 14	Job Custom field order 14 (User Definable)
Job Custom 15	Job Custom field order 15 (User Definable)
Job Custom 16	Job Custom field order 16 (User Definable)
Job Custom 17	Job Custom field order 17 (User Definable)
Job Custom 18	Job Custom field order 18 (User Definable)
Job Custom 19	Job Custom field order 19 (User Definable)
Job Custom 2	Job Custom field order 2 (Typically Policy Info)
Job Custom 20	Job Custom field order 20 (User Definable)
Job Custom 3	Job Custom field order 3 (Typically Loan #)
Job Custom 4	Job Custom field order 4 (Typically Lockbox Code)
Job Custom 5	Job Custom field order 5 (Typically Gate/Gar. Code)
Job Custom 6	Job Custom field order 6 (Typically Other Info)
Job Custom 7	Job Custom field order 7 (User Definable)
Job Custom 8	Job Custom field order 8 (User Definable)
Job Custom 9	Job Custom field order 9 (User Definable)
Job ID	Job ID
Job Lost	Job Lost (Yes or No)
Job Name	Job Name
Job Notes	Job Notes
Job Progress	Job Progress Description
Job Staff Full Name	Job Staff – Typically defined as Estimator
Job Status	Job Status – Active, Inactive, Deleted
Job Super Full Name	Job Super – Typically defined as Project Manager
Job Year Built	Job Year Built
List Determination	Reason Job was not Sold
Lot Block	Claim #
Primary Contact Address 1	Job Primary Contact - Address 1
Primary Contact Address 2	Job Primary Contact - Address 2
Primary Contact City	Job Primary Contact - City
Primary Contact City, State, Zip	Job Primary Contact - City, State, Zip
Primary Contact Country	Job Primary Contact - Country
Primary Contact Email	Job Primary Contact - Email Address
Primary Contact First Name	Job Primary Contact - First Name
Primary Contact Full Address	Job Primary Contact – Full Address
Primary Contact Full Name	Job Primary Contact – Full Name
Primary Contact Last Name	Job Primary Contact – Last Name
Primary Contact Logon Name	Job Primary Contact – Job Portal Logon Details
Primary Contact MI	Job Primary Contact – Middle Initial
Primary Contact Phone 1	Job Primary Contact – Phone Number in Phone field 1
Primary Contact Phone 1 Type	Job Primary Contact – Type of Number associated with Phone field 1
Primary Contact Phone 2	Job Primary Contact – Phone Number in Phone field 2
Primary Contact Phone 2 Type	Job Primary Contact – Type of Number associated with Phone field 2



Email Template – Setup

Job Merge Fields - continued

Merge Field

Primary Contact Phone 3
 Primary Contact Phone 3 Type
 Primary Contact Phone 4
 Primary Contact Phone 4 Type
 Primary Contact Phone 5
 Primary Contact Phone 5 Type
 Primary Contact State Code
 Primary Contact State Name
 Primary Contact Title
 Primary Contact Zip
 Project Contact Address 1
 Project Contact Address 2
 Project Contact City, State, Zip
 Project Contact Email
 Project Contact Full Name
 Project Contact Phone 1
 Project Contact Phone 1 Type
 Project Contact Phone 2
 Project Contact Phone 2 Type
 Project Contact Title
 Red Flag
 Referral Email
 Referral Full Name
 Referral Phone 1
 Referral Phone 1 Type
 Referral Phone 2
 Referral Phone 2 Type
 Referral Contact Project
 Referral Type
 Sales Manager Address 1
 Sales Manager Address 2
 Sales Manager City, State, Zip
 Sales Manager Email
 Sales Manager Full Name
 Sales Manager Phone 1
 Sales Manager Phone 1 Type
 Sales Manager Phone 2
 Sales Manager Phone 2 Type
 Secondary Contact First Name
 Secondary Contact Full Name
 Secondary Contact Initials
 Secondary Contact Last Name
 Secondary Contact Logon Name
 Secondary Contact Middle Initial
 Secondary Contact Phone 1
 Secondary Contact Phone 1 Type
 Secondary Contact Phone 2
 Secondary Contact Phone 2 Type1
 Secondary Contact Title
 Staff 10 Email
 Staff 10 Full Name
 Staff 10 Type
 Staff 11 Email
 Staff 11 Full Name

Definition

Job Primary Contact – Phone Number in Phone field 3
 Job Primary Contact – Type of Number associated with Phone field 3
 Job Primary Contact – Phone Number in Phone field 4
 Job Primary Contact – Type of Number associated with Phone field 4
 Job Primary Contact – Phone Number in Phone field 5
 Job Primary Contact – Type of Number associated with Phone field 5
 Job Primary Contact – 2 Digit State Code
 Job Primary Contact – 2 Digit State Code
 Job Primary Contact Title
 Job Primary Contact Zip Code
 Company Contact Address 1
 Company Contact Address 2
 Company Contact City, State & Zip
 Company Contact Email Address
 Company Contact Full Name
 Company Contact Phone Number in Phone field 1
 Company Contact Type of Number associated with Phone field 1
 Company Contact Phone Number in Phone field 2
 Job Primary Contact – Type of Number associated with Phone field 2
 Company Contact Title
 Job Red Flag Notes
 Job Referral Email Address
 Job Referral Full Name
 Job Referral Phone Number in Phone field 1
 Job Referral Type of Number associated with Phone field 1
 Job Referral Phone Number in Phone field 2
 Job Referral Type of Number associated with Phone field 2
 Company the Job Referral is associated with
 Job Referral Title
 Typically the Marketing Rep - Address 1
 Typically the Marketing Rep - Address 2
 Typically the Marketing Rep - City, State & Zip
 Typically the Marketing Rep - Email Address
 Typically the Marketing Rep - Full Name
 Typically the Marketing Rep - Phone Number in Phone field 1
 Typically the Marketing Rep - Type of Number associated with Phone field 1
 Typically the Marketing Rep - Phone Number in Phone field 2
 Typically the Marketing Rep - Type of Number associated with Phone field 2
 Secondary Job Contact – First Name
 Secondary Job Contact – Full Name
 Secondary Job Contact – Initials
 Secondary Job Contact – Last Name
 Secondary Job Contact – Job Portal Logon Details
 Secondary Job Contact – Middle Initial
 Secondary Job Contact - Phone Number in Phone field 1
 Secondary Job Contact - Type of Number associated with Phone field 1
 Secondary Job Contact - Phone Number in Phone field 2
 Secondary Job Contact - Type of Number associated with Phone field 2
 Secondary Job Contact - Title
 Staff 10 - Email
 Staff 10 – Full Name
 Staff 10 - Description
 Staff 11 - Email
 Staff 11 – Full Name



Email Template – Setup

Job Merge Fields - continued

Merge Field

Definition

Staff 11 Type	Staff 11 - Description
Staff 12 Email	Staff 12 - Email
Staff 12 Full Name	Staff 12 – Full Name
Staff 12 Type	Staff 12 - Description
Staff 13 Email	Staff 13 - Email
Staff 13 Full Name	Staff 13 – Full Name
Staff 13 Type	Staff 13 - Description
Staff 14 Email	Staff 14 - Email
Staff 14 Full Name	Staff 14 – Full Name
Staff 14 Type	Staff 14 - Description
Staff 2 Address 1	Typically the Lead Tech - Address 1
Staff 2 Address 2	Typically the Lead Tech - Address 2
Staff 2 City, State, Zip	Typically the Lead Tech - City, State & Zip
Staff 2 Email	Typically the Lead Tech - Email Address
Staff 2 Full Name	Typically the Lead Tech – Full Name
Staff 2 Phone 1	Typically the Lead Tech - Phone Number in Phone field 1
Staff 2 Phone 1 Type	Typically the Lead Tech - Type of Number associated with Phone field 1
Staff 2 Phone 2	Typically the Lead Tech - Phone Number in Phone field 2
Staff 2 Phone 2 Type	Typically the Lead Tech - Type of Number associated with Phone field 2
Staff 4 Email	Typically the Call Taker - Email Address
Staff 4 Full Name	Typically the Call Taker – Full Name
Staff 5 Email	Typically Accounting - Email Address
Staff 5 Full Name	Typically Accounting – Full Name
Staff 6 Email	Staff 6 - Email
Staff 6 Full Name	Staff 6 – Full Name
Staff 7 Email	Staff 7 - Email
Staff 7 Full Name	Staff 7 – Full Name
Staff 8 Email	Staff 8 - Email
Staff 8 Full Name	Staff 8 – Full Name
Staff 9 Email	Staff 9 - Email Address
Staff 9 Full Name	Staff 9 – Full Name
Staff Email	Typically the Estimator - Email Address
Staff First Name	Typically the Estimator – First Name
Staff Full Name	Typically the Estimator – Full Name
Staff Initials	Typically the Estimator - Initials
Staff Last Name	Typically the Estimator – Last Name
Staff MI	Typically the Estimator – Middle Initial
Staff Phone 1	Typically the Estimator - Phone Number in Phone field 1
Staff Phone 1 Type	Typically the Estimator - Type of Number associated with Phone field 1
Staff Phone 2	Typically the Estimator - Phone Number in Phone field 2
Staff Phone 2 Type	Typically the Estimator - Type of Number associated with Phone field 2
Staff Phone 3	Typically the Estimator - Phone Number in Phone field 3
Staff Phone 3 Type	Typically the Estimator - Type of Number associated with Phone field 3
Staff Phone 4	Typically the Estimator - Phone Number in Phone field 4
Staff Phone 4 Type	Typically the Estimator - Type of Number associated with Phone field 4
Staff Phone 5	Typically the Estimator - Phone Number in Phone field 5
Staff Phone 5 Type	Typically the Estimator - Type of Number associated with Phone field 5
Super Email	Typically the Project Manager – Email Address
Super First Name	Typically the Project Manager – First Name
Super Full Name	Typically the Project Manager – Full Name
Super Last Name	Typically the Project Manager – Last Name
Super MI	Typically the Project Manager – Middle Initial
Super Phone 1	Typically the Project Manager – Phone Number in Phone field 1
Super Phone 1 Type	Typically the Project Mgr – Type of Number associated with Phone field 1



Email Template – Setup

Job Merge Fields - continued

Merge Field

Super Phone 2
 Super Phone 2 Type
 Super Phone 3
 Super Phone 3 Type
 Super Phone 4
 Super Phone 4 Type
 Super Phone 5
 Super Phone 5 Type

Definition

Typically the Project Manager – Phone Number in Phone field 2
 Typically the Project Mgr – Type of Number associated with Phone field 2
 Typically the Project Manager – Phone Number in Phone field 3
 Typically the Project Mgr – Type of Number associated with Phone field 3
 Typically the Project Manager – Phone Number in Phone field 4
 Typically the Project Mgr – Type of Number associated with Phone field 4
 Typically the Project Manager – Phone Number in Phone field 5
 Typically the Project Mgr – Type of Number associated with Phone field 5

Loss Merge Fields

Merge Field

Date Custom KPI 1
 Date Custom KPI 2
 Date Custom KPI 3
 Date Custom KPI 4
 Date Drying Completed
 Date Drying Started
 Date Estimate Approved
 Date Job Not Sold
 Date Site Inspected
 Date Target Start Date
 Job Completed
 Current Date
 Date Contacted
 Date Estimate Accepted
 Date Estimate Delivered
 Date List Closed
 Date List Opened
 Date List Repaired
 Date List Repaired End
 Date List Reviewed
 Date List Reviewed End
 Date List SignOff by Owner
 Date List SignOff by Staff
 Date List Submitted
 Date Projected Close
 List Action Taken
 List Category
 List Date Required
 List Determination
 List Notes
 List Number
 List Service Requested
 List SubCategory
 List Type

Definition

Custom KPI Date – user definable
 Custom KPI Date – user definable
 Custom KPI Date – user definable
 Custom KPI Date – user definable
 Date Drying Completed
 Drying Started Date
 Estimate Approved Date
 Job Not Sold Date
 Site Inspected Date
 Target Start Date
 Job Completed Date
 Current Date
 Customer Contacted Date
 WA/Contract Signed Date
 Estimate Uploaded Date
 Date Closed
 Date Received
 Date the job is scheduled to start
 Date the job is scheduled to end
 Site Inspection is scheduled to start
 Site Inspection is scheduled to end
 List Customer Name
 List Project Manager Name
 Date of Loss
 Target Completion Date
 WO Action Taken
 WO Category
 WO DOL
 Job Determination why a job was completed, closed or lost
 Loss Notes
 Loss Number
 WO Service Requested field typically the work to be performed
 WO Sub Category
 Loss Type (Water, Mold, Fire, etc.)



Email Template – Setup

WO (Work Order) Merge Fields

Merge Field

ActionTaken
 Area
 Category
 Closed
 Current Date
 Customer Request
 Date Due
 Date Review Scheduled
 Date Review Scheduled Duration
 Date Review Scheduled Time
 Date Vendor Scheduled
 Date Vendor Scheduled Duration
 Date Vendor Scheduled Time
 Deleted
 Determination
 Fax Number
 Item Date Completed
 Item Number
 Item Service
 Item Staff Full Name
 Item Super Full Name
 Phone Number
 Progress
 Service Request
 Sign Off Owner Date
 Sign Off Owner Name
 Sign Off Staff Date
 Sign Off Staff Name
 Sign Off Vendor Date
 Sign Off Vendor Name
 Sub Category
 Vendor Address Line 1
 Vendor Address Line 2
 Vendor City
 Vendor City State Zip
 Vendor Full Address
 Vendor Name
 Vendor State
 Vendor State Name
 Vendor Zip

Definition

WO Action Taken Notes
 WO Area
 WO Category
 WO Closed (True or False)
 Current Date
 WO Customer Request
 Date WO is Due
 Date the Site Visit/Inspection is scheduled
 How long the Site Visit/Inspection is going to take
 Time the Site Visit/Inspection is scheduled to start
 Date the Sub/Tech is scheduled to begin the work
 How long the Sub/Tech is going to take
 Time the Sub/Tech is scheduled to start
 WO Deleted (True or False)
 Job Determination why a job was completed, closed or lost
 Sub/Tech Fax Number
 Date WO was completed
 WO Number
Field Not Available
 Typically defined as Estimator – Full Name
 Typically defined as Project Manager – Full Name
 Sub/Tech Phone Number
 WO Progress
 WO Service Requested field typically the work to be performed
 Date the Customer signed off the WO is complete
 Customer Name
 Date the Estimator signed off the WO is complete
 Estimator Name
 Date the Sub/Tech signed off the WO is complete
 Sub/Tech Name
 WO Sub Category
 Sub/Tech Address
 Sub/Tech Address 2
 Sub/Tech City
 Sub/Tech City, State & Zip
 Sub/Tech Full Address
 Sub/Tech Name
 Sub/Tech State Code
 Sub/Tech State Name
 Sub/Tech Zip



Email Template – Setup

Business Merge Fields (Settings→ System Setup→ System Information)

<u>Merge Field</u>	<u>Definition</u>
Builder Address Line 1	Address
Builder Address Line 2	Address 2
Builder Full Address	Full Address
City	City
City State Zip	City, State & Zip
Current Date	Current Date
Name	Business Name
Owner Web Site	Job Contact Website
Phone 1	Phone Number
Phone 1 Type	Field Not Available
Phone 2	Fax Number
Phone 2 Type	<i>Field Not Available</i>
Phone 3	<i>Field Not Available</i>
Phone 3 Type	<i>Field Not Available</i>
Phone 4	<i>Field Not Available</i>
Phone 4 Type	<i>Field Not Available</i>
Phone 5	<i>Field Not Available</i>
Phone 5 Type	<i>Field Not Available</i>
State	State Code
State Name	State Name
Vendor Web Site	Sub/Tech Website
Web Site	Business Website
Zip	Zip

Office Merge Fields (Settings→ Office Setup→ Office Detail)

<u>Merge Field</u>	<u>Definition</u>
Site Description	Typically Company Name
Site Address Line 1	Office Address
Site Address Line 2	Office Address 2
Site City	Office City
Site State	Office State Code
Site State Name	Office State Name
Site ZIP	Office Zip
Site City State Zip	Office City, State & Zip
Site Full Address	Office Full Address
Site Contact	Office Contact Full Name
Site Phone	Office Phone Number
Site Fax	Office Fax Number
Site Email	Office Email Address

Company Merge Fields

<u>Merge Field</u>	<u>Definition</u>
Project	Company Name
Project Code	Company Code
Project City	Company City
Project State	Company State Code
Project State Name	Company State Name
Project ZIP	Company Zip
Project City State ZIP	Company City, State & Zip
Project County	Company County
Project Country	Company Country



Email Template – Setup

Company Merge Fields - continued

Merge Field

Project Location
 Project Primary Contact First Name
 Project Primary Contact MI
 Project Primary Contact Last Name
 Project Primary Contact Full Name
 Project Primary Contact Address Line 1
 Project Primary Contact Address Line 2
 Project Primary Contact City
 Project Primary Contact State
 Project Primary Contact State Name
 Project Primary Contact ZIP
 Project Primary Contact City State Zip
 Project Primary Contact Full Address
 Project Primary Contact Email
 Project Primary Contact Title
 Project Primary Contact Phone 1
 Project Primary Contact Phone 2
 Project Primary Contact Phone 3
 Project Primary Contact Phone 4
 Project Primary Contact Phone 5
 Project Primary Contact Phone 1 Type
 Project Primary Contact Phone 2 Type
 Project Primary Contact Phone 3 Type
 Project Primary Contact Phone 4 Type
 Project Primary Contact Phone 5 Type
 Project Secondary Contact First Name
 Project Secondary Contact MI
 Project Secondary Contact Last Name
 Project Secondary Contact Full Name
 Project Secondary Contact Address Line 1
 Project Secondary Contact Address Line 2
 Project Secondary Contact City
 Project Secondary Contact State
 Project Secondary Contact State Name
 Project Secondary Contact ZIP
 Project Secondary Contact City State Zip
 Project Secondary Contact Full Address
 Project Secondary Contact Email
 Project Secondary Contact Title
 Project Secondary Contact Phone 1
 Project Secondary Contact Phone 2
 Project Secondary Contact Phone 3
 Project Secondary Contact Phone 4
 Project Secondary Contact Phone 5
 Project Secondary Contact Phone 1 Type
 Project Secondary Contact Phone 2 Type
 Project Secondary Contact Phone 3 Type
 Project Secondary Contact Phone 4 Type
 Project Secondary Contact Phone 5 Type
 Project Plat
 Project Subdivision
 Project Zone

Definition

Field Not Available
 Company Primary Contact First Name
 Company Primary Contact Middle Initial
 Company Primary Contact Last Name
 Company Primary Contact Last Name
 Company Primary Contact Address
 Company Primary Contact Address 2
 Company Primary Contact City
 Company Primary Contact State Code
 Company Primary Contact State Name
 Company Primary Contact Zip
 Company Primary Contact City, State & Zip
 Company Primary Contact Full Address
 Company Primary Contact Email Address
 Company Primary Contact Title
 Company Primary Contact Phone Field 1
 Company Primary Contact Phone Field 2
 Company Primary Contact Phone Field 3
 Company Primary Contact Phone Field 4
 Company Primary Contact Phone Field 5
 Company Primary Contact Type of Number associated with Phone field 1
 Company Primary Contact Type of Number associated with Phone field 2
 Company Primary Contact Type of Number associated with Phone field 3
 Company Primary Contact Type of Number associated with Phone field 4
 Company Primary Contact Type of Number associated with Phone field 5
 Company Secondary Contact First Name
 Company Secondary Contact Middle Initial
 Company Secondary Contact Last Name
 Company Secondary Contact Full Name
 Company Secondary Contact Address
 Company Secondary Contact Address 2
 Company Secondary Contact City
 Company Secondary Contact State Code
 Company Secondary Contact State Name
 Company Secondary Contact Zip
 Company Secondary Contact City, State & Zip
 Company Secondary Contact Full Address
 Company Secondary Contact Email Address
 Company Secondary Contact Title
 Company Secondary Contact Phone Field 1
 Company Secondary Contact Phone Field 2
 Company Secondary Contact Phone Field 3
 Company Secondary Contact Phone Field 4
 Company Secondary Contact Phone Field 5
 Company Secondary Contact Type of Number associated with Phone field 1
 Company Secondary Contact Type of Number associated with Phone field 2
 Company Secondary Contact Type of Number associated with Phone field 3
 Company Secondary Contact Type of Number associated with Phone field 4
 Company Secondary Contact Type of Number associated with Phone field 5
Field Not Available
Field Not Available
Field Not Available



Email Template – Setup

Sub/Tech Merge Fields

Merge Field

Current Date
Vendor Primary Contact Logon
VENDOR Name
VENDOR Vendor ID
VENDOR DBA
VENDOR Name Short
VENDOR Address 1
VENDOR Address 2
VENDOR City
VENDOR State Code
VENDOR State Name
VENDOR Zip
VENDOR City, State, Zip
VENDOR Country
VENDOR Full Address
VENDOR_Phone
VENDOR_Fax
VENDOR Website
VENDOR_Open Status
VENDOR_Closed Status
VENDOR On Call
VENDOR INS Auto Cert
VENDOR INS Auto Date
VENDOR INS Liability Cert
VENDOR INS Liability Date
VENDOR INS Workmans Comp Cert
VENDOR INS Workmans Comp Date
VENDOR Taxable
VENDOR Billing Company
VENDOR Billing Attention
VENDOR Billing Address 1
VENDOR Billing Address 2
VENDOR Billing City
VENDOR Billing State Code
VENDOR Billing State Name
VENDOR Billing Zip
VENDOR Billing City, State, Zip
VENDOR Billing Full Address
VENDOR Billing Phone
VENDOR Billing Fax
VENDOR Billing Contact Name
VENDOR Billing Contact Email
VENDOR Billing FEIN
VENDOR PC Contact ID
VENDOR PC First Name
VENDOR PC MI
VENDOR PC Last Name
VENDOR PC Country
VENDOR PC Full Name
VENDOR PC Initials
VENDOR PC Address 1
VENDOR PC Address 2
VENDOR PC City
VENDOR PC Phone 1 Type

Definition

Current Date
Sub/Tech Primary Contact Portal Logon
Sub/Tech Name
Sub/Tech ID
Sub/Tech DBA (Doing Business As)
Sub/Tech Short Name
Sub/Tech Address
Sub/Tech Address 2
Sub/Tech City
Sub/Tech State Code
Sub/Tech State Name
Sub/Tech Zip
Sub/Tech City, State & Zip
Sub/Tech Country
Sub/Tech Full Address
Sub/Tech Phone Number
Sub/Tech Fax Number
Sub/Tech Website
Sub/Tech Open WO Status
Sub/Tech Closed WO Status
Sub/Tech On Call (True or False)
Sub/Tech Auto Ins. Certificate Number
Sub/Tech Auto Ins. Expiration Date
Sub/Tech Liability Ins. Certificate Number
Sub/Tech Liability Ins. Expiration Date
Sub/Tech Workers Comp Certificate Number
Sub/Tech Workers Comp Expiration Date
Sub/Tech Taxable (True or False)
Sub/Tech Billing Company
Sub/Tech Billing Attention Full Name
Sub/Tech Billing Address
Sub/Tech Billing Address 2
Sub/Tech Billing City
Sub/Tech Billing State Code
Sub/Tech Billing State Name
Sub/Tech Billing Zip
Sub/Tech Billing City, State & Zip
Sub/Tech Billing Full Address
Sub/Tech Billing Phone Number
Sub/Tech Billing Fax Number
Sub/Tech Billing Contact Full Name
Sub/Tech Billing Contact Email Address
Sub/Tech Billing Contact FEIN Number
Sub/Tech Primary Contact ID
Sub/Tech Primary Contact First Name
Sub/Tech Primary Contact Middle Initial
Sub/Tech Primary Contact Last Name
Sub/Tech Primary Country
Sub/Tech Primary Contact Full Name
Sub/Tech Primary Contact Initials
Sub/Tech Primary Contact Address
Sub/Tech Primary Contact Address 2
Sub/Tech Primary Contact City
Sub/Tech Primary Contact Type of Number associated with Phone field 1



Email Template – Setup

Sub/Tech Merge Fields - continued

Merge Field

VENDOR PC Phone 2
VENDOR PC State Code
VENDOR PC Phone 2 Type
VENDOR PC State Name
VENDOR PC Phone 3
VENDOR PC Zip
VENDOR PC City, State, Zip
VENDOR PC Phone 3 Type
VENDOR Full Address
VENDOR PC Phone 4
VENDOR PC On Call
VENDOR PC Phone 4 Type
VENDOR PC Email
VENDOR PC Phone 5
VENDOR PC Phone 1
VENDOR PC Phone 5 Type
VENDOR PC Status

Definition

Sub/Tech Primary Contact Phone Field 2
Sub/Tech Primary Contact State Code
Sub/Tech Primary Contact Type of Number associated with Phone field 2
Sub/Tech Primary Contact State Name
Sub/Tech Primary Contact Phone Field 3
Sub/Tech Primary Contact Zip
Sub/Tech Primary Contact City, State & Zip
Sub/Tech Primary Contact Type of Number associated with Phone field 3
Sub/Tech Primary Contact Full Address
Sub/Tech Primary Contact Phone Field 4
Sub/Tech Primary Contact On Call (True or False)
Sub/Tech Primary Contact Type of Number associated with Phone field 4
Sub/Tech Primary Contact Email Address
Sub/Tech Primary Contact Phone Field 5
Sub/Tech Primary Contact Phone Field 1
Sub/Tech Primary Contact Type of Number associated with Phone field 5
Sub/Tech Primary Contact Status (Active, Inactive or Deleted)