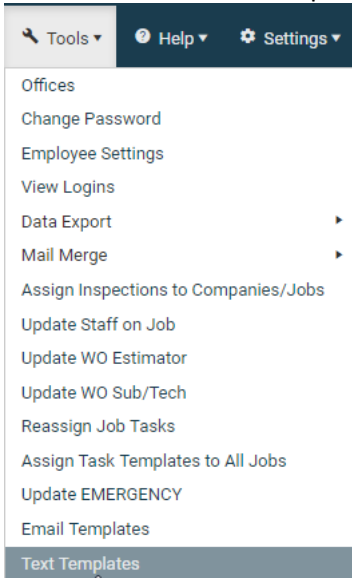


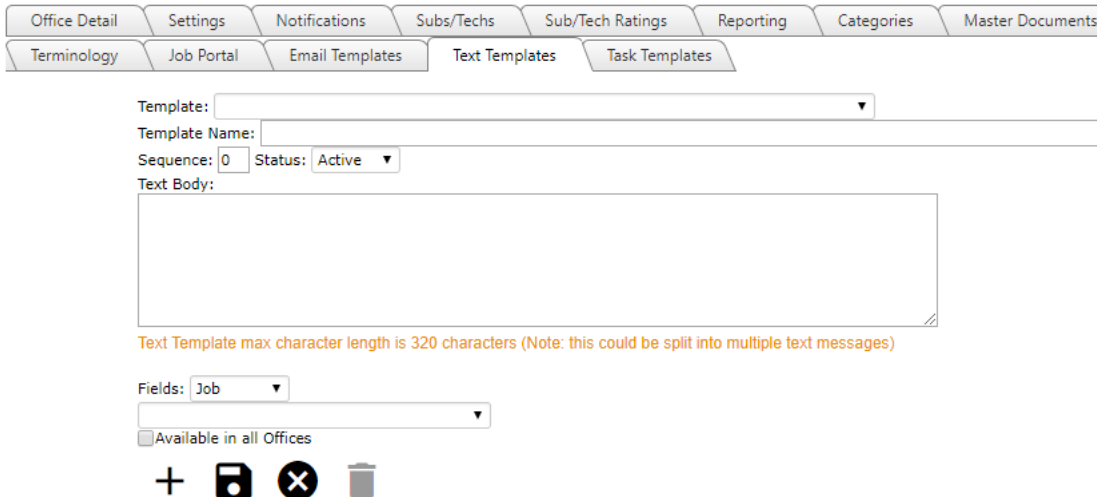
Text Template – Setup

Text Templates can be used in the following pages Notifications, Reminders, Job Correspondence, Company Correspondence, and Sub/Tech Records.

To add or edit a Text Template in Restoration Manager go to Tools → Text Templates



After selecting Text Templates; Template, Template Name, Sequence, Status, Text Body, Fields, and Available in all Offices will be displayed.

A screenshot of the Text Template setup form. The form is displayed within a navigation bar that includes tabs for Office Detail, Settings, Notifications, Subs/Techs, Sub/Tech Ratings, Reporting, Categories, Master Documents, Terminology, Job Portal, Email Templates, Text Templates, and Task Templates. The 'Text Templates' tab is active. The form fields are: 'Template:' (a dropdown menu), 'Template Name:' (a text input field), 'Sequence:' (a numeric input field with '0' entered), 'Status:' (a dropdown menu with 'Active' selected), 'Text Body:' (a large text area), a note below the text area stating 'Text Template max character length is 320 characters (Note: this could be split into multiple text messages)', 'Fields:' (a dropdown menu with 'Job' selected), and 'Available in all Offices' (a checkbox). At the bottom of the form are four icons: a plus sign, a floppy disk, a trash can with an 'X', and a trash can.

Text Template – Setup

To add a new text template.

Add the **Template Name** this is description of template and will appear in the drop down to select from.

Template Name:

Note: The Template Name is not part of the text when it is sent.

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

Sequence:

Add your text message within the **Text Body** 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.

Text Body:

Text Template max character length is 320 characters (Note: this could be split into multiple text messages)

Fields: Job

Available in all Offices

+
📁
✖
🗑

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

Fields:

- Job
- Loss
- WO
- Business
- Office
- Company
- Sub/Tech

Fields: Job

Merge Fields:

- 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
- Adjuster Email
- Adjuster Full Name
- Adjuster Phone 1

Important: The Fields, Merge Fields and Definitions are available on pages 4-13

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

Text Template – Setup

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.

The following is an example of a completed Text Template.

| |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Template: <input type="text" value="Arriving Soon"/> |
| Template Name: <input type="text" value="Arriving Soon"/> |
| Sequence: <input type="text" value="0"/> Status: <input type="text" value="Active"/> |
| Text Body: <input type="text" value="Hi [Primary Contact First Name], [Secondary Contact First Name] our crew is on the way and should be arriving within 30 minutes. **THIS IS A RECEIVE ONLY TEXT - DO NOT REPLY** QUESTIONS PLEASE CALL 303-800-5182 OR EMAIL RESTORATION@VERISK.COM. THANK YOU!"/> |
| <small>Text Template max character length is 320 characters (Note: this could be split into multiple text messages)</small> |

Text Templates can be used within the following Pages.

- Job Correspondence → Text Contact
Company Correspondence → Text Contact
- Sub/Tech Correspondence → Text Contact
- Settings → Office Setup → Notifications
- Settings → Reminders



Text 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



Text Template – Setup

Job Merge Fields - continued

| <u>Merge Field</u> | <u>Definition</u> |
|----------------------------------|--------------------------------------------------------------------|
| 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 |



Text Template – Setup

Job Merge Fields - continued

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



Text 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 |



Text 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.)



Text Template – Setup

WO (Work Order) Merge Fields

Merge Field

Definition

| | |
|--------------------------------|---------------------------------------------------------------|
| ActionTaken | WO Action Taken Notes |
| Area | WO Area |
| Category | WO Category |
| Closed | WO Closed (True or False) |
| Current Date | Current Date |
| Customer Request | WO Customer Request |
| Date Due | Date WO is Due |
| Date Review Scheduled | Date the Site Visit/Inspection is scheduled |
| Date Review Scheduled Duration | How long the Site Visit/Inspection is going to take |
| Date Review Scheduled Time | Time the Site Visit/Inspection is scheduled to start |
| Date Vendor Scheduled | Date the Sub/Tech is scheduled to begin the work |
| Date Vendor Scheduled Duration | How long the Sub/Tech is going to take |
| Date Vendor Scheduled Time | Time the Sub/Tech is scheduled to start |
| Deleted | WO Deleted (True or False) |
| Determination | Job Determination why a job was completed, closed or lost |
| Fax Number | Sub/Tech Fax Number |
| Item Date Completed | Date WO was completed |
| Item Number | WO Number |
| Item Service | <i>Field Not Available</i> |
| Item Staff Full Name | Typically defined as Estimator – Full Name |
| Item Super Full Name | Typically defined as Project Manager – Full Name |
| Phone Number | Sub/Tech Phone Number |
| Progress | WO Progress |
| Service Request | WO Service Requested field typically the work to be performed |
| Sign Off Owner Date | Date the Customer signed off the WO is complete |
| Sign Off Owner Name | Customer Name |
| Sign Off Staff Date | Date the Estimator signed off the WO is complete |
| Sign Off Staff Name | Estimator Name |
| Sign Off Vendor Date | Date the Sub/Tech signed off the WO is complete |
| Sign Off Vendor Name | Sub/Tech Name |
| Sub Category | WO Sub Category |
| Vendor Address Line 1 | Sub/Tech Address |
| Vendor Address Line 2 | Sub/Tech Address 2 |
| Vendor City | Sub/Tech City |
| Vendor City State Zip | Sub/Tech City, State & Zip |
| Vendor Full Address | Sub/Tech Full Address |
| Vendor Name | Sub/Tech Name |
| Vendor State | Sub/Tech State Code |
| Vendor State Name | Sub/Tech State Name |
| Vendor Zip | Sub/Tech Zip |



Text 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 | Field Not Available |
| Phone 3 | Field Not Available |
| Phone 3 Type | Field Not Available |
| Phone 4 | Field Not Available |
| Phone 4 Type | Field Not Available |
| Phone 5 | Field Not Available |
| Phone 5 Type | Field Not Available |
| 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 |



Text 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



Text Template – Setup

Sub/Tech Merge Fields

Merge Field

Definition

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



Text Template – Setup

Sub/Tech Merge Fields - continued

Merge Field

Definition

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