

Appendix B – Merge Fields

Below is the complete list of all merge fields used in Templates and Activity Checklists.

Contact

Contact#AnimotoLink	Contact#LastPersonalVisitDate
Contact#AnniversaryDate	Contact#LifetimeValue
Contact#AnnualIncome	Contact#LinkedInLink
Contact#BirthDate	Contact#Photo
Contact#BlogLink	Contact#PinterestLink
Contact#ClientId	Contact#RevolvEmailAddress
Contact#Company	Contact#ReferredDate
Contact#ContactStatus	Contact#RentOwn
Contact#DropboxLink	Contact#RSSLink
Contact#EmailFolderLink	Contact#SavvycardLink
Contact#EnhancedGoogleMapLink	Contact#Sex
Contact#EvernoteLink	Contact#ShowingReport
Contact#FacebookProfileLink	Contact#ShowingReport-NonSentOnly
Contact#FirstName	Contact#ShowingReport-SentOnly
Contact#GoogleDriveLink	Contact#Source
Contact#GooglePlusLink	Contact#SourceUrl
Contact#HomeAddress	Contact#Stage
Contact#HomeEmail	Contact#Title
Contact#HomeFax	Contact#TwitterHandle
Contact#HomeMap	Contact#WorkAddress
Contact#HomeMobile	Contact#WorkEmail
Contact#HomePhone	Contact#WorkFax
Contact#HomePurchaseAnniversary	Contact#WorkMap
Contact#HomeWebsite	Contact#WorkMobile
Contact#InstagramLink	Contact#WorkPhone
Contact#KnownSince	Contact#WorkWebsite
Contact#LastCallDate	Contact#YearMove
Contact#LastName	Contact#YoutubeLink
Contact#LastPersonalNoteDate	

Referred By

Replace the ?? with any Contact field name listed above following the # sign.

Contact:ReferredBy??

Example: **Contact:ReferredBy#MailingName**

Activity

When sending templates using an activity action, the following merge fields are available

Activity#Date
Activity#Note
Activity#Time
Activity#Title

Activity:Checklist#All
Activity:Checklist#Completed
Activity:Checklist#Incomplete
Activity:Checklist#Removed

Others

CurrentDate
CurrentDay-DOW "Day of Week"
Footer
Greeting
Header

InBusinessSince
MailingName
ServiceArea
Signature
TeamName

Current User

CurrentUser#Address
CurrentUser#CellPhone
CurrentUser#City
CurrentUser#Company
CurrentUser#EmailAddress
CurrentUser#Fax
CurrentUser#FirstName
CurrentUser#HomePhone

CurrentUser#LastName
CurrentUser#Photo
CurrentUser#Pronoun
CurrentUser#State
CurrentUser#StreetAddress
CurrentUser#Website
CurrentUser#WorkPhone
CurrentUser#Zipcode

Primary User

PrimaryUser#Address
PrimaryUser#CellPhone
PrimaryUser#City
PrimaryUser#Company
PrimaryUser#EmailAddress
PrimaryUser#Fax
PrimaryUser#FirstName
PrimaryUser#HomePhone

PrimaryUser#LastName
PrimaryUser#Photo
PrimaryUser#Pronoun
PrimaryUser#State
PrimaryUser#StreetAddress
PrimaryUser#Website
PrimaryUser#WorkPhone
PrimaryUser#Zipcode

Property

General Fields

Property#Acreage	Property#OriginalPrice
Property#Age	Property#OtherCode
Property#AgentMarketingNarrative	Property#OtherInformation
Property#AlarmCode	Property#OurWebMarketingNarrative
Property#AlbumPhotos	Property#PartialBathrooms
Property#AnimotoLink	Property#Photo
Property#AnnualPropertyTax	Property#PhotoEmbed
Property#AreaInSqFeet	Property#PhotoLink
Property#Bedrooms	Property#PinterestLink
Property#BlogLink	Property#PrimaryBoardName
Property#BuySideCommission	Property#PrimaryMLSNumber
Property#City	Property#PropertyStreetAddress
Property#County	Property#PropertyType
Property#Directions	Property#RealtorLink
Property#DropboxLink	Property#RealvolveEmailAddress
Property#Dues	Property#RecordOwnerName
Property#EmailFolderLink	Property#SavvycardLink
Property#FullBathrooms	Property#Schools
Property#Garage	Property#SellerReport
Property#GarageType	Property#SellerReport-NonSentOnly
Property#GateCode	Property#SellerReport-SentOnly
Property#GeoState	Property#ShackleCode
Property#GoogleDriveLink	Property#ShowingInstructions
Property#GoogleMapCustomUrl	Property#SQFT
Property#GoogleMapLink	Property#Status
Property#HOA	Property#StreetAddress
Property#ImportantListingNotes	Property#Subdivision
Property#InternetMarketingNarrative	Property#Summary
Property#ListSideCommission	Property#TotalCommission
Property#ListingPrice	Property#TruliaLink
Property#ListingType	Property#UniqueFeatures
Property#LockboxNumber	Property#VirtualTourLink
Property#Map	Property#WebsiteLink
Property#MarketingTagline	Property#YearBuilt
Property#MasterBedroomOnMailLevel	Property#YoutubeLink
Property#Notes	Property#ZillowLink
Property#Occupancy	Property#Zipcode

Special Note on Address

Property#PropertyStreetAddress	123 S Main Ave, Bolivar MO 65613 US
Property#StreetNumber	123
Property#StreetDirection	S
Property#StreetName	Main Ave
Property#City	Bolivar
Property#GeoState	MO
Property#Zipcode	65613

Date Fields

Property#BrokerOpenDate
Property#DateInMLS
Property#DateInREaltorCom
Property#DateInTrulia
Property#DateInZillow
Property#ExpiringDate
Property#ListingDate
Property#ListingAppointmentDate
Property#MarketingAgreementDate

Property#MLSTargetDate
Property#OpenHouseDate
Property#PhotographyDate
Property#PreListingHomeInspectionDate
Property#PreMarketingDate
Property#SignInstallDate
Property#StagingDate
Property#VirtualTourDate
Property#WithdrawnDate

Time Fields

Property#BrokerOpenTime
Property#ListingAppointmentTime
Property#OpenHouseTime
Property#PhotographyTime

Property#PreListingHomeInspection
Property#StagingTime
Property#VirtualTourTime

Property Party Members

Each property party member type has a series of merge fields. Instead of repeating each merge field for each party member type, I've listed the party member types used in the merge field. Using Asset Manager as an example: replace the ?????? from the party member merge field list with **AssetManager** to get **Property:AssetManager#MailingName** as the merge field name. Notice how we have removed the spaces between the words.

Party Member Types

AssetManager	OpenHouseHost	SellerAgentAssistant
Assistant	Photographer	SellerAttorney
AuctionRepresentative	Plumber	SellerReferredBy
CopyWriter	PreListingHomeInspector	SellersTitle
CoTrustee	PropertyManager	SellerTransactionCoordinator
EscrowOfficer	RelocationSpecialist	SignInstaller
Executor	Seller	Stager
Handyman	Seller2	Tenant
InsideSalesAssociate	Seller3	Tenant2
Landlord	Seller4	TermiteInspector
ListingCoordinator	SellerAgent	Trustee
Locksmith	SellerAgent2	Videographer
MarketingAssistant	SellerAgent3	
OfficeManager	SellerAgent4	

Party Member Merge Fields

Property:??????#AnimotoLink	Property:??????#InstagramLink
Property:??????#AnniversaryDate	Property:??????#KnownSince
Property:??????#AnnualIncome	Property:??????#LastCallDate
Property:??????#BirthDate	Property:??????#LastName
Property:??????#BlogLink	Property:??????#LastPersonalNoteDate
Property:??????#ClientId	Property:??????#LastPersonalVisitDate
Property:??????#Company	Property:??????#LifetimeValue
Property:??????#ContactStatus	Property:??????#LinkedInLink
Property:??????#DropboxLink	Property:??????#MailingName
Property:??????#EmailFolderLink	Property:??????#Photo
Property:??????#EnhancedGoogleMapLink	Property:??????#PinterestLink
Property:??????#EvernoteLink	Property:??????#RealvolveEmailAddress
Property:??????#FacebookProfileLink	Property:??????#ReferredDate
Property:??????#FirstName	Property:??????#RentOwn
Property:??????#GoogleDriveLink	Property:??????#RSSLink
Property:??????#GooglePlusLink	Property:??????#SavvycardLink
Property:??????#Greeting	Property:??????#Sex
Property:??????#HomeAddress	Property:??????#ShowingReport
Property:??????#HomeEmail	Property:??????#ShowingReport-NonSentOnly
Property:??????#HomeFax	Property:??????#ShowingReport-SentOnly
Property:??????#HomeMap	Property:??????#Source
Property:??????#HomeMobile	Property:??????#SourceUrl
Property:??????#HomePhone	Property:??????#Stage
Property:??????#HomePurchaseAnniversary	Property:??????#Title
Property:??????#HomeWebsite	Property:??????#TwitterHandle

Property:??????#WorkAddress
Property:??????#WorkEmail
Property:??????#WorkFax
Property:??????#WorkMap

Property:??????#WorkMobile
Property:??????#WorkPhone
Property:??????#WorkWebsite
Property:??????#YoutubeLink

Transaction

General Fields

Transaction#AnimotoLink
Transaction#BlogLink
Transaction#ClientsAttending
Transaction#ClosingInformation
Transaction#ClosingType
Transaction#DateFunded
Transaction#DropboxLink
Transaction#EarnestDeposit1
Transaction#EarnestDeposit2
Transaction#EmailFolderLink
Transaction#GoogleDriveLink
Transaction#InstagramLink
Transaction#PhotoLink
Transaction#PinterestLink
Transaction#RealtorLink
Transaction#RealvolveEmailAddress
Transaction#SalesPrice
Transaction#SavvycardLink
Transaction#SignAtClose
Transaction#StreetAddress
Transaction#Terms
Transaction#TransactionType
Transaction#TruliaLink
Transaction#VirtualTourLink
Transaction#WebsiteLink
Transaction#YoutubeLink
Transaction#ZillowLink

Property Linked to Transaction

Transaction:Property#Acreage
Transaction:Property#Age
Transaction:Property#AgentMarketingNarrative
Transaction:Property#AlarmCode
Transaction:Property#AlbumPhotos
Transaction:Property#AnimotoLink
Transaction:Property#AnnualPropertyTax
Transaction:Property#AreaInSqFeet
Transaction:Property#Bedrooms
Transaction:Property#BlogLink
Transaction:Property#BuySideCommission
Transaction:Property#City
Transaction:Property#County
Transaction:Property#Directions
Transaction:Property#DropboxLink
Transaction:Property#Dues
Transaction:Property#EmailFolderLink
Transaction:Property#FullBathrooms
Transaction:Property#Garage
Transaction:Property#GarageType
Transaction:Property#GateCode
Transaction:Property#GoogleDriveLink
Transaction:Property#GoogleMapLink
Transaction:Property#ImportantListingNotes
Transaction:Property#InternetMarketingNarrative
Transaction:Property#ListSideCommission
Transaction:Property#ListingPrice
Transaction:Property#LockboxNumber
Transaction:Property#Map
Transaction:Property#MarketingTagline
Transaction:Property#MasterBedroomOnMainLevel
Transaction:Property#Notes
Transaction:Property#Occupancy
Transaction:Property#OriginalPrice
Transaction:Property#OtherCode
Transaction:Property#OtherInformation
Transaction:Property#OurWebMarketingNarrative
Transaction:Property#Photo
Transaction:Property#PhotoEmbed
Transaction:Property#PhotoLink
Transaction:Property#PinterestLink
Transaction:Property#PrimaryBoardName
Transaction:Property#PrimaryMLSNumber
Transaction:Property#PropertyStreetAddress
Transaction:Property#PropertyType
Transaction:Property#RealtorLink
Transaction:Property#RealvolveEmailAddress
Transaction:Property#RecordOwnerName
Transaction:Property#SavvycardLink
Transaction:Property#Schools
Transaction:Property#SellerReport
Transaction:Property#SellerReport-NonSentOnly
Transaction:Property#SellerReport-SentOnly
Transaction:Property#ShackleCode
Transaction:Property#ShowingInstructions
Transaction:Property#SignAtClose
Transaction:Property#SQFT
Transaction:Property#Status
Transaction:Property#StreetAddress
Transaction:Property#Subdivision
Transaction:Property#Summary
Transaction:Property#TotalCommission
Transaction:Property#TruliaLink
Transaction:Property#UniqueFeatures
Transaction:Property#VirtualTourLink
Transaction:Property#WebsiteLink

Transaction:Property#YearBuilt
Transaction:Property#YoutubeLink

Transaction:Property#ZillowLink
Transaction:Property#Zipcode

Special Note on Address

Transaction#StreetAddress	123 S Main Ave, Bolivar MO 65613 US
Transaction#StreetNumber	123
Transaction#StreetDirection	S
Transaction#StreetName	Main Ave
Transaction#City	Bolivar
Transaction#GeoState	MO
Transaction#Zipcode	65613

Date Fields

Transaction#AcceptanceDate
Transaction#AcceptanceDeadlineDate
Transaction#AgentEvaluationDate
Transaction#AlternativeEarnestDeadlineDate
Transaction#ApplicationDeadlineDate
Transaction#AppraisalContingencyDate
Transaction#AppraisalDate
Transaction#AppraisalDeadlineDate
Transaction#AppraisalObjectionDeadlineDate
Transaction#AppraisalOrderedDate
Transaction#AppraisalReceivedDate
Transaction#AttorneyReviewDate
Transaction#BuyerReferralDate
Transaction#BuyerSettlementDate
Transaction#BuyerSignedContractDate
Transaction#CertificateOfOccupancyDate
Transaction#ChecklistReceivedDate
Transaction#ChecklistSentDate
Transaction#ChimneyInspectionContingencyDate
Transaction#ChimneyInspectionDate
Transaction#CleartoCloseDate
Transaction#ClosingDate
Transaction#CommissionApprovedDate
Transaction#CommitmentDeadlineDate
Transaction#ConditionalSaleDeadlineDate
Transaction#ContingencyDate
Transaction#Transaction#Transaction#ContingentSaleCloseDate
Transaction#ContingentSaleContractDate
Transaction#ContractDate
Transaction#CreditInformationDeadlineDate
Transaction#CreditInformationDisapprovalDeadlineDate
Transaction#CreditOrderedDate
Transaction#CreditReceivedDate
Transaction#DateFunded
Transaction#DisclosureReceivedDate
Transaction#DueDiligenceDocumentsDeliveryDeadlineDate
Transaction#DueDiligenceDocumentsObjectionDeadlineDate
Transaction#DueDiligenceDocumentsResolutionDeadlineDate
Transaction#ECADDueDate
Transaction#EffectiveDate
Transaction#ExistingLoanDocumentsDeadlineDate
Transaction#ExistingLoanDocumentsObjectionDeadlineDate
Transaction#FinalWalkthroughDate
Transaction#FinanceDeadlineDate
Transaction#FinancialCommitmentDate
Transaction#FinancingContingencyDate
Transaction#FinancingCreditApprovalDate
Transaction#FireInspectionDate
Transaction#FirstEarnestDueDate
Transaction#HOADocsDeliveredDate
Transaction#HOADocsOrderedDate
Transaction#HOADocumentsDeadlineDate
Transaction#HOADocumentsObjectionDeadlineDate
Transaction#HOADueDate
Transaction#HomeInspectionContingencyDate
Transaction#HomeInspectionDate
Transaction#InitialContactDate
Transaction#InspectionContingencyExpDate
Transaction#InspectionObjectionDeadlineDate
Transaction#InspectionResolutionDeadlineDate
Transaction#LastInspectionDate
Transaction#LeadPaintContingencyDate
Transaction#LeadPaintInspectionDate
Transaction#LeaseEndDate
Transaction#LeaseSignedDate
Transaction#LeaseStartDate
Transaction#LenderApplyByDate
Transaction#LenderAppraisalDate
Transaction#LenderRespondDate
Transaction#LoanApprovalDate
Transaction#LoanObjectionDeadlineDate
Transaction#LoanTransferApprovalDeadlineDate
Transaction#MoldInspectionContingencyDate
Transaction#MoldInspectionDate
Transaction#MortgageApprovalDate
Transaction#MoveInDate
Transaction#MoveOutDate
Transaction#NoticeDate
Transaction#Off-RecordTitleDeadlineDate
Transaction#Off-RecordTitleObjectionDeadlineDate
Transaction#OptionExpirationDate
Transaction#PercolationTestContingencyDate
Transaction#PercolationTestDate
Transaction#PestInspectionDate
Transaction#PoolInspectionDate
Transaction#PossessionDate
Transaction#PreApprovalLetterDueDate
Transaction#PrivateFinancingDeadlineDate
Transaction#ProcessingSentDate
Transaction#ProjectedCloseDate
Transaction#ProjectedMoveOutDate
Transaction#PropertyInsuranceObjectionDeadlineDate
Transaction#PurchaseAgreementDate
Transaction#RadonContingencyDate
Transaction#RadonDropDate
Transaction#RadonPickupDate
Transaction#RatificationDate
Transaction#RecordTitleDeadlineDate
Transaction#RecordTitleObjectionDeadlineDate
Transaction#ReinspectionDueDate
Transaction#RenewalDate
Transaction#RepairAgreementDate
Transaction#RepairsCompletedDate
Transaction#RepairsDueDate
Transaction#ResaleCertDueDate
Transaction#RightofFirstRefusalDeadlineDate

Transaction#SecondEarnestDueDate
Transaction#SellerDisclosureDueDate
Transaction#SellerReferralDate
Transaction#SellerSettlementDate
Transaction#SepticInspectionContingencyDate
Transaction#SepticInspectionDate
Transaction#StructuralInspectionDate
Transaction#SurveyContingencyDate
Transaction#SurveyDate
Transaction#SurveyDeadlineDate
Transaction#SurveyObjectionDeadlineDate
Transaction#SurveyResolutionDeadlineDate

Transaction#TermiteInspectionContingencyDate
Transaction#TermiteInspectionDate
Transaction#TitleCommitmentDueDate
Transaction#TitleOrderedDate
Transaction#TitleReceivedDate
Transaction#TitleResolutionDeadlineDate
Transaction#TitleSigningDate
Transaction#UnderwritingConditionDate
Transaction#VerificationofFundsDueDate
Transaction#WaterInspectionDate
Transaction#WellInspectionContingencyDate
Transaction#WellInspectionDate

Time Fields

Transaction#AcceptanceDeadlineTime
Transaction#AppraisalTime
Transaction#AttorneyReviewTime
Transaction#BuyerSettlementTime
Transaction#ChimneyInspectionTime
Transaction#ClosingTime
Transaction#ContractTime
Transaction#FinalWalkthroughTime
Transaction#HomeInspectionTime
Transaction#LastInspectionTime
Transaction#LeadPaintInspectionTime
Transaction#MoveInTime

Transaction#MoveOutTime
Transaction#PoolInspectionTime
Transaction#PossessionTime
Transaction#RadonDropTime
Transaction#RadonPickupTime
Transaction#RepairsCompletedTime
Transaction#SellerSettlementTime
Transaction#SepticInspectionTime
Transaction#StructuralInspectionTime
Transaction#TermiteInspectionTime
Transaction#WaterInspectionTime

Transaction Party Members

Each transaction party member type has a series of merge fields. Instead of repeating each merge field for each party member type, I've listed the party member types used in the merge field. Using Asset Manager as an example: replace the ?????? from the party member merge field list with **AssetManager** to get **Transaction:AssetManager#MailingName** as the merge field name. Notice how we have removed the spaces between the words.

Party Member Types

Accountant	EscrowOfficerAssistant	RADONInspectionCompany
AdditionalInspector1	Executor	RelocationSpecialist
AdditionalInspector2	FireInspector	RoofInspector
Appraiser	GasCompany	Seller
AsbestosInspector	Handyman	Seller2
AssetManager	HomeInspector	Seller3
Assistant	HomeownersAssociation	Seller4
AuctionRepresentative	HomeWarrantyCompany	SellerAgent
Bank1stTrust	HVACInspector	SellerAgent2
Bank2ndTrust	InsideSalesAssociate	SellerAgent3
Bookkeeping	InsuranceCompany	SellerAgent4
Builder	Landlord	SellerAgentAssistant
Buyer	LeadPaintInspector	SellerAttorney
Buyer2	ListingCoordinator	SellerAttorneyParalegal
Buyer3	LoanOfficerAssistant	SellerReferredBy
Buyer4	LoanOfficerLender	SellersTitle
BuyerAgent	LoanProcessor	SellerTransactionCoordinator
BuyerAgent2	Locksmith	SepticInspector
BuyerAgent3	MarketingAssistant	ShortSaleNegotiator
BuyerAgent4	MoldInspector	SignInstaller
BuyerAgentAssistant	MortgageBroker	Stager
BuyerAttorney	MortgageCloser	StructuralInspector
BuyerAttorneyParalegal	MortgageOriginator	Surveyor
BuyerReferredBy	MortgageProcessor	Tenant
BuyersTitle	MovingCompany	Tenant2
BuyerTransactionCoordinator	OfficeManager	TermiteInspector
ChimneyInspector	OpenHouseHost	TransactionCoordinator
ClientServices	PercolationInspector	Trustee
ClosingLocation	PestInspector	Videographer
Contractor	Photographer	WaterCompany
CopyWriter	Plumber	WaterInspector
Co-Trustee	PoolInspector	WellInspector
ElectricCompany	PreListingHomeInspector	
EscrowOfficer	PropertyManager	

Party Member Merge Fields

Transaction:???????#AnimotoLink
Transaction:???????#AnniversaryDate
Transaction:???????#AnnualIncome
Transaction:???????#BirthDate
Transaction:???????#BlogLink
Transaction:???????#ClientId
Transaction:???????#Company
Transaction:???????#ContactStatus
Transaction:???????#DropboxLink
Transaction:???????#EmailFolderLink
Transaction:???????#EnhancedGoogleMapLink
Transaction:???????#EvernoteLink
Transaction:???????#FacebookProfileLink
Transaction:???????#FirstName
Transaction:???????#GoogleDriveLink
Transaction:???????#GooglePlusLink
Transaction:???????#Greeting
Transaction:???????#HomeAddress
Transaction:???????#HomeEmail
Transaction:???????#HomeFax
Transaction:???????#HomeMap
Transaction:???????#HomeMobile
Transaction:???????#HomePhone
Transaction:???????#HomePurchaseAnniversary
Transaction:???????#HomeWebsite
Transaction:???????#InstagramLink
Transaction:???????#KnownSince
Transaction:???????#LastCallDate
Transaction:???????#LastName
Transaction:???????#LastPersonalNoteDate
Transaction:???????#LastPersonalVisitDate
Transaction:???????#LinkedInLink
Transaction:???????#MailingName
Transaction:???????#Photo
Transaction:???????#PinterestLink
Transaction:???????#RealvolveEmailAddress
Transaction:???????#ReferredDate
Transaction:???????#RentOwn
Transaction:???????#RSSLink
Transaction:???????#SavvycardLink
Transaction:???????#Sex
Transaction:???????#ShowingReport
Transaction:???????#ShowingReport-NonSentOnly
Transaction:???????#ShowingReport-SentOnly
Transaction:???????#Source
Transaction:???????#SourceUrl
Transaction:???????#Stage
Transaction:???????#Title
Transaction:???????#TwitterHandle
Transaction:???????#WorkAddress
Transaction:???????#WorkEmail
Transaction:???????#WorkFax
Transaction:???????#WorkMap
Transaction:???????#WorkMobile
Transaction:???????#WorkPhone
Transaction:???????#WorkWebsite
Transaction:???????#YearMoved
Transaction:???????#YoutubeLink