

Template Variables Guide

Prepared By:	Karen Barker
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Using Template Variables

Template variables enable you to add a 'tag' into templates that are replaced at time of processing with information relating to the lead.

For example, the tag **{LEAD_FIRST_NAME}** would be replaced with **John** when creating an email relating to a lead in the name of Mr. John Smith.

Template variables can be added using the field chooser or by manually typing the variable name. The end result is the same but the field chooser is quick and easy to use and reduces the likelihood of error. Click the **Insert Template Variable** button to open the field chooser.

1. To use variables, enclose the variable name shown in the table below in { and } tags. The field chooser will add the variable name and required tags automatically.
2. If a variable is recognised but has no value, the variable tag will be removed from the processed template.
3. Some variables are replaced at the time of sending, so will appear untouched in processed templates prior to sending. This behaviour is noted in the information below in bold.
4. If the variable tag appears in the processed template, and is not a variable that is replaced at the time of sending, it may not have been recognised so check its format and spelling for errors.

Available Variables

Lead Data

Description	Variable Name
Email unsubscribe link (sets 'permission to email' to 'no'). This variable is replaced at the time of sending.	LEAD_UNSUBSCRIBE
IP address lead received from	LEAD_IPADDRESS
Lead received date and time (1st Jan 2019 17:00)	LEAD_DATETIME
Lead received date (1st Jan 2019)	LEAD_DATE
Lead received date and time (1st January 2019 17:00)	LEAD_DATETIME_FULL
Lead received date (1st January 2019)	LEAD_DATE_FULL
Lead received date (dd/mm/yyyy)	LEAD_DATE_SHORT
Lead received date (yyyy-mm-dd)	LEAD_DATE_SYSTEM
Lead received time 24-hour format time (17:00)	LEAD_TIME
Lead status	LEAD_STATUS
Lead group ID	LEAD_GROUP_ID

Lead group name	LEAD_GROUP
Lead group type	LEAD_TYPE
Marketing source	LEAD_SOURCE
Marketing medium	LEAD_MEDIUM
Marketing term	LEAD_TERM
Lead cost	LEAD_COST
Lead value	LEAD_VALUE
Lead ID	LEAD_ID
Lead sub reference ID	LEAD_SUB_ID
Lead full name (e.g. Mr. John Smith)	LEAD_FULL_NAME
Lead title (e.g. Mr.)	LEAD_TITLE
Lead title, without stop character (e.g. Mr)	LEAD_TITLE_NOSTOP
Lead title code	LEAD_TITLE_CODE
First name	LEAD_FIRST_NAME
Last name	LEAD_LAST_NAME
Full concatenated address (for use on letters)	LEAD_FULL_ADD
Full concatenated address including company name (for use on letters)	LEAD_FULL_ADD_COMPANY
Short concatenated address (1st line and postcode)	LEAD_SHORT_ADD
Company name	LEAD_COMPANY
Job title	LEAD_JOBTITLE
Date of birth (01/01/2019)	LEAD_DOB
Date of birth - day	LEAD_DOB_DAY
Date of birth - month	LEAD_DOB_MONTH
Date of birth - year	LEAD_DOB_YEAR
Phone number 1	LEAD_PHONE1
Phone number 2	LEAD_PHONE2
Fax number	LEAD_FAX
Email address	LEAD_EMAIL
Address line 1	LEAD_ADDRESS
Address line 2	LEAD_ADDRESS2
Address line 3	LEAD_ADDRESS3
Town or City	LEAD_TOWNCITY
Postcode	LEAD_POSTCODE

Preferred contact time (Anytime, Morning, Afternoon, Evening)	LEAD_CONTACT_TIME
Contact permission - phone	LEAD_CONTACT_PHONE
Contact permission - text message	LEAD_CONTACT_SMS
Contact permission - email	LEAD_CONTACT_EMAIL
Contact permission - letter	LEAD_CONTACT_MAIL
Contact permission - fax	LEAD_CONTACT_FAX
Document upload link (only available on XL and Concierge editions)	LEAD_DOCUMENT_UPLOAD
Data provided on lead, corresponding to data field in lead group - see below	LEAD_DATA1 (1 to 50)
Data field label corresponding to data field in lead group	LEAD_LABEL1 (1 to 50)

If the template is available in a single lead group then the field chooser will show all used LEAD_DATA fields including their names.

If the template is available to all leads then the field chooser will show all LEAD_DATA fields 1-50 without names which may vary by lead group.

User Data

Description	Variable Name
Assigned user ID	USER_ID
Assigned user name (or site name if over-ridden in user's settings)	USER_NAME
Assigned user email address (or site email address if non existent)	USER_EMAIL
Assigned user phone number (or site phone number if non existent)	USER_PHONE
Assigned user DDI number (or empty if non existent)	USER_DDI
Assigned user mobile number (or empty if non existent)	USER_MOBILE
Assigned user fax number (or site fax if non existent)	USER_FAX
Assigned user job title	USER_JOBTITLE
Site name	USER_COMPANY
Site address	USER_ADDRESS
Email disclaimer text (can be edited in 'Settings > Configuration > Email')	USER_SIGNATURE
Assigned user additional data field (or site additional data field if non existent)	USER_DATA1 (1 to 10)

Site Data

Description	Variable Name
Site ID	SITE_ID
Site name	SITE_NAME
Site email address	SITE_EMAIL
Site phone number	SITE_PHONE
Site fax number	SITE_FAX
Site address	SITE_ADDRESS
Site additional data field	SITE_DATA1 (1 to 10)

Buyer Data

Description	Variable Name
Introducer ID	INTRODUCER_ID
Introducer reference	INTRODUCER_REF
Introducer name	INTRODUCER_NAME
Amount paid to the introducer	INTRODUCER_PAID
Referral partner ID	BUYER_ID
Referral partner name	BUYER_NAME
Referral partner email address	BUYER_EMAIL
Referral partner phone number	BUYER_PHONE
Referral partner opening hours	BUYER_HOURS
Appointment date (Tues, 1st Jan 2019 17:00)	BUYER_APP_DATE
Appointment notes	BUYER_APP_NOTES
Reference ID - telephone transfer	BUYER_REF_TRANS
Reference ID - XML delivery	BUYER_REF_XML
Referral date and time	BUYER_TRANS_DATE
Result of a telephone transfer (Successful or Failed)	BUYER_TRANS_RES
Amount paid by the referral partner	BUYER_COST
Referral partner ID 1 (leads sent to multiple partners)	SUB_BUYER_ID1 (1 to 10)
Referral partner name 1 (leads sent to multiple partners)	SUB_BUYER_NAME1 (1 to 10)
Referral partner email address 1 (leads sent to multiple partners)	SUB_BUYER_EMAIL1 (1 to 10)
Referral partner phone number 1 (leads sent to multiple partners)	SUB_BUYER_PHONE1 (1 to 10)

Referral partner opening hours 1 (leads sent to multiple partners)	SUB_BUYER_HOURS1 (1 to 10)
Appointment date 1 (Tues, 1st Jan 2019 17:00) (leads sent to multiple partners)	SUB_BUYER_APP_DATE1 (1 to 10)
Appointment notes 1 (leads sent to multiple partners)	SUB_BUYER_APP_NOTES1 (1 to 10)

Platform Data

Description	Variable Name
Current date and time (1st Jan 2019 17:00)	PLATFORM_DATETIME
Current date (1st Jan 2019)	PLATFORM_DATE
Current date and time (1st January 2019 17:00)	PLATFORM_DATETIME_FULL
Current date (1st January 2019)	PLATFORM_DATE_FULL
Current date (dd/mm/yyyy)	PLATFORM_DATE_SHORT
Current date (yyyy-mm-dd)	PLATFORM_DATE_SYSTEM
Current time 24-hour format time (17:00)	PLATFORM_TIME
Main business name	PLATFORM_NAME
Main business email address	PLATFORM_EMAIL
Main business phone number	PLATFORM_PHONE

Conditional Data

Description	Variable Name
If exists, outputs customer name after line break	COND_NAME
If exists, outputs company name after line break	COND_COMPANY
If exists, outputs date of birth after line break	COND_DOB
If exists, outputs phone number 1 after line break	COND_PHONE1
If exists, outputs phone number 2 after line break	COND_PHONE2
If exists, outputs email address after line break	COND_EMAIL
If exists, outputs address line 1 after line break	COND_ADDRESS
If exists, outputs address line 2 after line break	COND_ADDRESS2
If exists, outputs address line 3 after line break	COND_ADDRESS3
If exists, outputs town/city after line break	COND_TOWNCITY
If exists, outputs postcode after line break	COND_POSTCODE
If exists, outputs preferred contact time after line break	COND_CONTACT_TIME
If exists, outputs appointment date after line break	COND_APP_DATE

If exists, outputs appointment notes after line break	COND_APP_NOTES
If exists, outputs lead data labels/values after line breaks (excludes internal fields)	COND_DATA
If exists, outputs lead data labels/values after line breaks	COND_DATA_ALL

Appointments Data

If multiple appointments exist on the lead, appointment variables are replaced at time of processing with information relating to the next appointment.

Description	Variable Name
Appointment date (1st Jan 2019)	APP_DATE
Appointment date (1st January 2019)	APP_DATE_FULL
Appointment date (dd/mm/yyyy)	APP_DATE_SHORT
Appointment date (yyyy-mm-dd)	APP_DATE_SYSTEM
Appointment time	APP_TIME
Appointment duration	APP_DURATION
Appointment location	APP_LOCATION
Appointment title	APP_TITLE
Appointment user	APP_USER

Journeys Data

Journeys variable names are system generated from the name given by the user and pre-fixed with “J_”. The field chooser will show all those relevant to the lead group the template is available in.

Description	Variable Name
Replace [VARIABLE NAME] with the required journey variable name	J_[VARIABLE NAME]

To retrieve the name of a specific field go to ‘Settings > Journeys’ and edit the field in question from within a journey. The template variable name is noted in the edit menu.

A

Fact find

Edit field

Field name

SecondAppName

This is the short field name displayed in Journeys' field list. It does not change the text displayed on this form.

Template variable

J_SECONDAPP

Translating Values

It's sometimes necessary to alter values before they are inserted into a template. To do this, add the translations (from=to) into the tag after the variable name, separated by commas.

i.e. {VARIABLE,from=to,from=to,from=to,*=to}

If no match is found for the value, the original value will be used. The exception is if a wildcard value (denoted by an asterisk *) is found, in which case the wildcard value will be used.

The from/to value can be blank, for example {VARIABLE,=Nothing} will match a blank value and replace it with 'Nothing'.

For example, if the value in additional field 1 is either 'Yes' or 'No', it can be translated to '1' or '0' before insertion into the template:

{LEAD_DATA1,Yes=1,No=0}

To make any value other than 'Yes' or 'No' translate to '0', use:

{LEAD_DATA1,Yes=1,*=0}