



ORANGECRM

Merge Tags for Email, OrangeTask & Web Site Post Fulfillments

Purpose: Dynamically personalize the content of fulfillments with details stored in the customer record such as name, order date, product description, etc.

Field Name in Customer Record	Field Location	Merge Tag (strategically place in fulfillment where the value is to be populated)	Value/Output (this is the data that will appear in place of the merge tag when the fulfillment is generated)
GUID - Full	Top right of customer record	%CUSTGUID%	Full 32-Character Customer GUID
GUID - Last 10	Top right of customer record	%CUSTID-10%	Last 10 Characters of Customer GUID
GUID - Last 20	Top right of customer record	%CUSTID-20%	Last 20 Characters of Customer GUID
GUID - Last 30	Top right of customer record	%CUSTID-30%	Last 30 Characters of Customer GUID
STATUS	Top left of customer record	%STATUS%	Customer Status
FIRST NAME + MIDDLE NAME + LAST NAME	Left side of customer record	%FULLNAME%	First Name <space> Middle Name <space> Last Name
FIRST NAME	Left side of customer record	%FIRSTNAME%	First Name
MIDDLE NAME	Left side of customer record	%MIDDLENAME%	Middle Name
FIRST & MIDDLE INITIALS + LAST NAME	Left side of customer record	%FMLASTNAME%	First Initial <space> Middle Initial <space> Last Name
LAST NAME	Left side of customer record	%LASTNAME%	Last Name
PHONE	Left side of customer record	%PHONEONE%	Phone Number
EMAIL	Left side of customer record	%EMAIL%	Email
IM ADDRESS	Left side of customer record	%IMADDRESS%	Instant Message Address
SHIP ADDRESS – Line 1	Address tab of customer record	%ADDRESSONE%	Shipping Address Line 1
SHIP ADDRESS – Line 2	Address tab of customer record	%ADDRESSTWO%	Shipping Address Line 2
SHIP ADDRESS – Line 3	Address tab of customer record	%ADDRESSTHREE%	Shipping Address Line 3
SHIP CITY	Address tab of customer record	%CITY%	Shipping City
SHIP STATE	Address tab of customer record	%STATE%	Shipping State
SHIP ZIP	Address tab of customer record	%ZIP%	Shipping Zip Code
SHIP COUNTRY	Address tab of customer record	%COUNTRY%	Shipping Country
BILL ADDRESS – Line 1	Address tab of customer record	%BILLADDRESSONE%	Billing Address Line 1
BILL ADDRESS – Line 2	Address tab of customer record	%BILLADDRESSTWO%	Billing Address Line 2
BILL ADDRESS – Line 3	Address tab of customer record	%BILLADDRESSTHREE%	Billing Address Line 3
BILL CITY	Address tab of customer record	%BILLCITY%	Billing City
BILL STATE	Address tab of customer record	%BILLSTATE%	Billing State
BILL ZIP	Address tab of customer record	%BILLZIP%	Billing Zip Code
BILL COUNTRY	Address tab of customer record	%BILLCOUNTRY%	Billing Country
DATE ORDERED – MM/DD/YYYY	Right side of customer record	%DATEORDERED%	Date Ordered: MM/DD/YYYY
DATE ORDERED - YYYYMMDD	Right side of customer record	%DATEORDERYYMMDD%	Date Ordered: YYYYMMDD

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DATE ORDERED - MMDDYY	Right side of customer record	%DATEORDERMMDDYY%	Date Ordered: MMDDYY
DATE ORDERED - YYYY-MM-DD	Right side of customer record	%DATEORDERYYYY-MM-DD%	Date Ordered: YYYY-MM-DD
ESTIMATED BILL - DD-MMM-YYYY	Right side of customer record	%DATEESTBILL%	Estimated Next Bill Date: DD-MMM-YYYY
ESTIMATED BILL - YYMMDD	Right side of customer record	%DATEESTBILLYYMMDD%	Estimated Next Bill Date: YYMMDD
ESTIMATED BILL - MMDDYY	Right side of customer record	%DATEESTBILLMMDDYY%	Estimated Next Bill Date: MMDDYY
LAST PROCESS - DD-MMM-YYYY	Right side of customer record	%DATELASTPROC%	Last Process Date/Last Bill Date: DD-MMM-YYYY
LAST PROCESS - YYMMDD	Right side of customer record	%DATEPROCYMMDD%	Last Process Date/Last Bill Date: YYMMDD
LAST PROCESS - MMDDYY	Right side of customer record	%DATEPROCMMDDYY%	Last Process Date/Last Bill Date: MMDDYY
ESTIMATED BILL - AMOUNT	Right side of customer record	%ESTAMOUNT%	Estimated Next Bill Amount: 0.00
LEAD GUID	Right side of customer record	%LEADID%	Full 32-Character Lead GUID
RECORD / IP	Right side of customer record	%RECORDEDCALL%	Any value in the Record / IP Field
PAYMENT TYPE - Abbreviated	Account tab of customer record	%CARDTYPE%	Payment Type: V/M/AX/NO/ACH/CASH
PAYMENT TYPE - Full	Account tab of customer record	%CARDTYPEFULL%	Payment Type: Visa/MasterCard/American Express/Discover/USD Bank Account/CAD Bank
PAYMENT TYPE - Initials	Account tab of customer record	%CARDTYPEVMAD%	Payment Type: V/M/A/D
NAME ON CARD	Account tab of customer record	%CCNAME%	Full Name On Card
CREDIT CARD – Last 4	Account tab of customer record	%CCACCTABBR%	Last 4 digits of Card Number
CREDIT CARD – Full	Account tab of customer record	%CCACCOUNT%	Full Card Number
CC EXPIRE - Month	Account tab of customer record	%CCEXPIREMM%	Card Expiration Month: MM
CC EXPIRE - Year	Account tab of customer record	%CCEXPIREYY%	Card Expiration Year: YY
CC EXPIRE – Month + 2 Digit Year	Account tab of customer record	%CCEXPIREMMYY%	Full Card Expiration Date: MMY
CC EXPIRE – Month + 4 Digit Year	Account tab of customer record	%CCEXPIREMMYYYY%	Full Card Expiration Date: MMYYY
BIN	Account tab of customer record	%CCBIN%	Card BIN (First 6 digits of card number)
ACH ACCOUNT NAME	Account tab of customer record	%ACHNAME%	Name On ACH Account
ACH ACCOUNT NUMBER	Account tab of customer record	%ACHACCOUNT%	ACH Account Number
ACH ROUTING NUMBER	Account tab of customer record	%ACHABA%	ACH Routing Number
ACH NAME OF BANK	Account tab of customer record	%ACHBANKNAME%	ACH Bank Name
ACH BANK CITY	Account tab of customer record	%ACHBANKCITY%	ACH Bank City
ACH BANK STATE	Account tab of customer record	%ACHBANKSTATE%	ACH Bank State
ACH BANK ACCT TYPE	Account tab of customer record	%BANKACCTTYPE%	ACH Account Type: Checking/Savings/Business Checking
CAD ACCOUNT NAME	Account tab of customer record	%CADNAME%	Name on CAD Account

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CAD ACCOUNT NUMBER	Account tab of customer record	%CADACCOUNT%	CAD Account Number
CAD NAME OF BANK	Account tab of customer record	%CADBANKNAME%	CAD Bank Name
CAD INSTITUTION NO	Account tab of customer record	%CADFIN%	CAD Financial Institution Number
CAD BRANCH TRANSIT NO	Account tab of customer record	%CADFIBN%	CAD Financial Branch Transit Number
BANK ROUTE	Account tab of customer record	%BANKROUTE%	Bank Route assigned to customer
WEB USERNAME	Left side of customer record	%WEBUSERNAME%	Username
WEB PASSWORD	Left side of customer record	%WEBPASSWORD%	Password
WEB STATUS	Left side of customer record	%WEBSTATUS%	Web Status
SOAP ID	Right side of customer record	%EXTID%	SOAP ID
AFFILIATE TRACK – Field 1	Right side of customer record	%AFFILIATECODE%	Affiliate Code
AFFILIATE TRACK – Field 2	Right side of customer record	%AFFILIATESUBCODE%	Affiliate SubCode
LAST PROCESS - Billing Cycle	Right side of customer record	%CYCLE%	Billing Cycle
LAST PROCESS - Paid Cycle	Right side of customer record	%CYCLEPAID%	Paid Cycle
SALE PAGE	Right side of customer record	%SALESPAGE%	URL of web page where sale was acquired
ORDERED	Right side of customer record	%PLANSOLD%	Description of Product Ordered
CATEGORY	Left side of customer record	%CATEGORY%	Category assigned to customer
LANGUAGE	Details tab of customer record	%LANGUAGE%	Language
BIRTH CITY	Details tab of customer record	%BIRTHCITY%	Birth City
DATE OF BIRTH	Details tab of customer record	%DATEOFBIRTH%	Birth Date
CUSTOM VALUE 1	Details tab of customer record	%CUSTOMVALUE1%	Custom Field 1
CUSTOM VALUE 2	Details tab of customer record	%CUSTOMVALUE2%	Custom Field 2
CUSTOM VALUE 3	Details tab of customer record	%CUSTOMVALUE3%	Custom Field 3
CUSTOM VALUE 4	Details tab of customer record	%CUSTOMVALUE4%	Custom Field 4
CUSTOM VALUE 5	Details tab of customer record	%CUSTOMVALUE5%	Custom Field 5
CUSTOM VALUE 6	Details tab of customer record	%CUSTOMVALUE6%	Custom Field 6