Email Placeholder Tags

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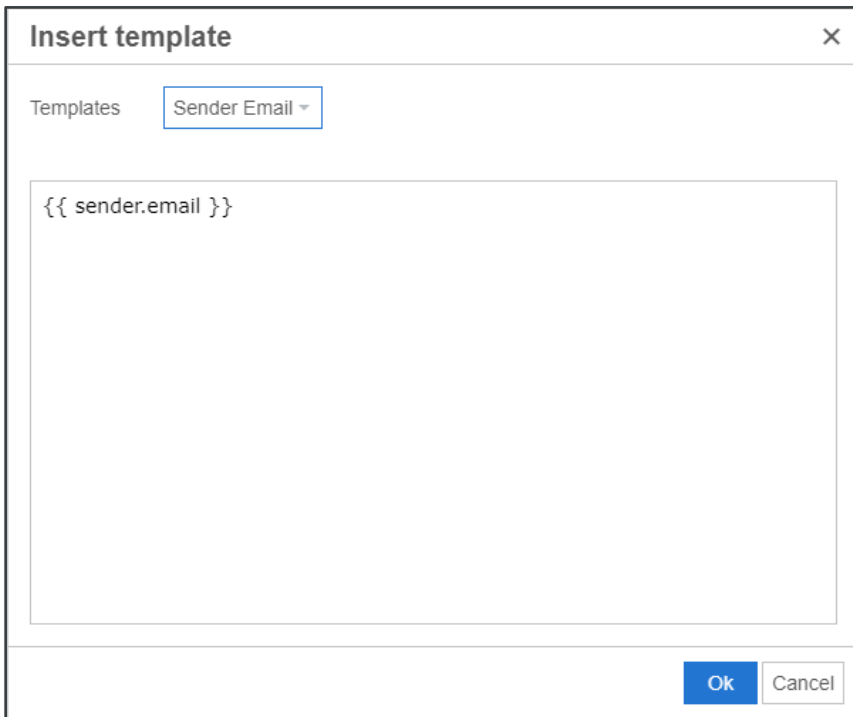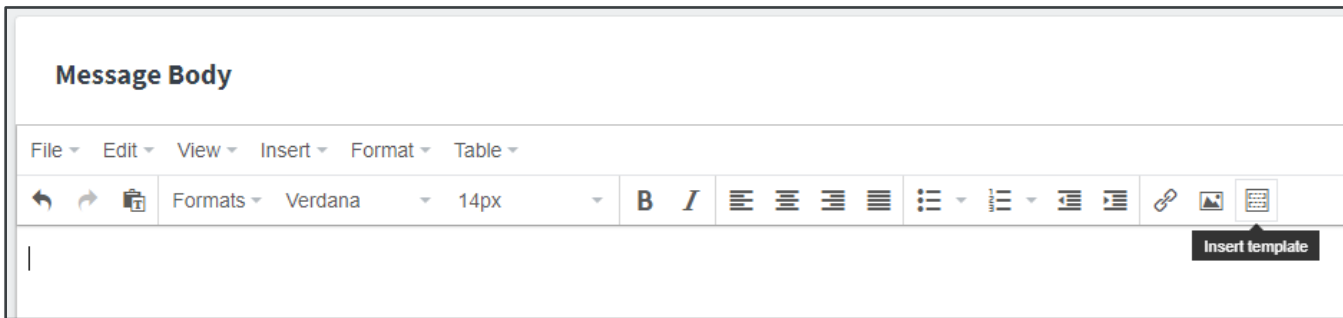
Introduction

You can use placeholder tags in email templates to allow you to make use of data associated with your account, such as loan or contact information for your contacts, to customize messages. Placeholders in the body of an email will populate the appropriate data when the email is sent.

If a placeholder refers to a field that has been left blank, nothing (not even whitespace) will be populated at the placeholder's location when the email is sent. It would appear to the recipient as if nothing had been typed at that location. (They will never see the placeholder code.)

You can type the placeholders listed in the tables below directly into an email template or select them from the drop-down menu in the **Insert template** dialog box.

Message Body

File ▾ Edit ▾ View ▾ Insert ▾ Format ▾ Table ▾

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Insert template

Insert template   ✕

Templates   Sender Email ▾

{{ sender.email }}

Ok   Cancel

If you are using the email builder feature, you can insert a placeholder by selecting it from the **Variables** drop-down in the text editing toolbar. You can locate a placeholder by typing in the box to filter the list.

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Sender Email
Sender First Name
Sender Last Name
Sender Company
Sender Title
Sender Website
Sender Website (Full URL)
Sender Phone Cell
Sender Phone Office
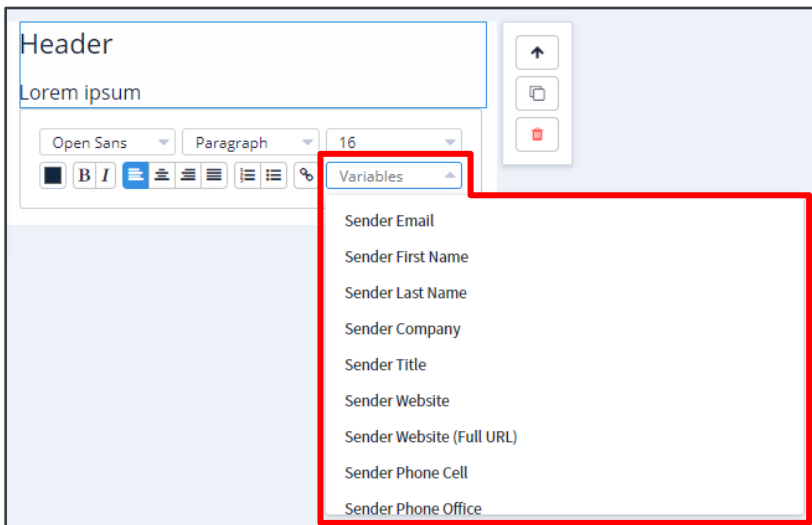
Sender, Co-Marketer, and Recipient Placeholders

The placeholders in the following sections populate data from user, organization, or contact records. They can be used in emails sent directly or by actions in an auto-campaign.

Sender Placeholders

These placeholders populate from data provided for the user account of the person sending an email. Contact information is drawn from the fields on the Account Settings page. Licensing information, links, and profile image are drawn from the fields on the Marketing Profile Settings page. The email signature is defined on the Email Settings page.

Name	Placeholder	Location to Set Value
Sender Email	{{ sender.email }}	Account Settings
Sender First Name	{{ sender.f_name }}	
Sender Last Name	{{ sender.l_name }}	
Sender Company	{{ sender.company }}	
Sender Title	{{ sender.job_title }}	
Sender Website	{{ sender.website }}	
Sender Website (Full URL)	{{ sender.website_full }}	
Sender Phone Cell	{{ sender.phone_cell }}	
Sender Phone Office	{{ sender.phone_office }}	
Sender Address Line 1	{{ sender.address }}	
Sender Address Line 2	{{ sender.address_two }}	
Sender City	{{ sender.city }}	
Sender State	{{ sender.state }}	
Sender Zip Code	{{ sender.zipcode }}	
Sender State Licenses	{{ sender.disclaimer }}	Marketing Profile Settings
Sender NMLS#	{{ sender.license_title }}	
Sender Biography	{{ sender.agent_bio }}	
Sender Facebook URL	{{ sender.social_facebook }}	
Sender Twitter URL	{{ sender.social_twitter }}	
Sender Google URL	{{ sender.social_google }}	
Sender Youtube URL	{{ sender.social_youtube }}	
Sender Linked In URL	{{ sender.social_linkedin }}	
Sender Application URL	{{ sender.application_url }}	
Sender Post Close Survey URL	{{ sender.post_close_survey_url }}	
Sender Profile Image	{{ sender.profile_image }}	
Sender Logo Image	{{ sender.logo_image }}	
Sender Email Signature	{{ sender.signature }}	Email Settings

Sender Organization Placeholders

These placeholders populate from data provided for the organization that is associated with the account sending the email. This information is all drawn from the fields on the organization's Marketing Settings page.

Name	Placeholder	Location to Set Value
Sender Organization Name	{{ sender.organization.settings.name }}	Organization Admin → Marketing Settings
Sender Organization Logo	{{ sender.organization.settings.logo_img }}	
Sender Organization Equal Housing Logo	{{ sender.organization.settings.eh_logo }}	
Sender Organization Web Disclaimer	{{ sender.organization.settings.disclaimer }}	
Sender Organization Biography	{{ sender.organization.settings.organization_bio }}	
Sender Organization Facebook URL	{{ sender.organization.settings.social_facebook }}	
Sender Organization Twitter URL	{{ sender.organization.settings.social_twitter }}	
Sender Organization Youtube URL	{{ sender.organization.settings.social_youtube }}	
Sender Organization LinkedIn URL	{{ sender.organization.settings.social_linkedin }}	
Sender Organization Web Disclosure Text	{{ sender.organization.settings.web_disclosure_text }}	
Sender Organization Email Disclosure Text	{{ sender.organization.settings.email_disclosure_text }}	

Co-Marketer Placeholders

When a co-marketer is specified, these placeholders populate from that user's account. The information is drawn from the same fields for the specified user as are used for the sender placeholders above.

The option to select a co-marketer is available when adding an email campaign to a contact or under Message Settings when sending an email directly. If the message contains no co-marketer (or co-marketer organization) placeholders, the option is not shown.

Name	Placeholder	Location to Set Value
Co-Marketer Email	{{ comarketer.email }}	co-marketer's Account Settings
Co-Marketer First Name	{{ comarketer.f_name }}	
Co-Marketer Last Name	{{ comarketer.l_name }}	
Co-Marketer Company	{{ comarketer.company }}	
Co-Marketer Title	{{ comarketer.job_title }}	
Co-Marketer Website	{{ comarketer.website }}	

Name	Placeholder	Location to Set Value
Co-Marketer Website (Full URL)	{{ comarketer.website_full }}	
Co-Marketer Phone Cell	{{ comarketer.phone_cell }}	
Co-Marketer Phone Office	{{ comarketer.phone_office }}	
Co-Marketer Address Line 1	{{ comarketer.address }}	
Co-Marketer Address Line 2	{{ comarketer.address_two }}	
Co-Marketer City	{{ comarketer.city }}	
Co-Marketer State	{{ comarketer.state }}	
Co-Marketer Zip Code	{{ comarketer.zipcode }}	
Co-Marketer State Licenses	{{ comarketer.disclaimer }}	co-marketer's Marketing Profile Settings
Co-Marketer NMLS#	{{ comarketer.license_title }}	
Co-Marketer Biography	{{ comarketer.agent_bio }}	
Co-Marketer Facebook URL	{{ comarketer.social_facebook }}	
Co-Marketer Twitter URL	{{ comarketer.social_twitter }}	
Co-Marketer Google URL	{{ comarketer.social_google }}	
Co-Marketer Youtube URL	{{ comarketer.social_youtube }}	
Co-Marketer Linked In URL	{{ comarketer.social_linkedin }}	
Co-Marketer Application URL	{{ comarketer.application_url }}	
Co-Marketer Profile Image	{{ comarketer.profile_image }}	
Co-Marketer Logo Image	{{ comarketer.logo_image }}	
Co-Marketer Email Signature	{{ comarketer.signature }}	co-marketer's Email Settings

Co-Marketer Organization Placeholders

When a co-marketer is specified, these placeholders populate from data provided for the organization that is associated with the co-marketer's account. The information is drawn from the same fields for the specified user's organization as are used for the sender organization placeholders above. If both the sender and the co-marketer belong to the same organization, then both sets of placeholders will populate the same information.

The option to select a co-marketer is available when adding an email campaign to a contact or under Message Settings when sending an email directly. If the message contains no co-marketer (or co-marketer organization) placeholders, the option is not shown.

Name	Placeholder	Location to Set Value
Co-Marketer Organization Name	{{ comarketer.organization.settings.name }}	co-marketer's Organization Admin → Marketing Settings
Co-Marketer Organization Logo	{{ comarketer.organization.settings.logo_img }}	
Co-Marketer Organization Equal Housing Logo	{{ comarketer.organization.settings.eh_logo }}	

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Name	Placeholder	Location to Set Value
Co-Marketer Organization Web Disclaimer	{{ comarketer.organization.settings.disclaimer }}	
Co-Marketer Organization Biography	{{ comarketer.organization.settings.organization_bio }}	
Co-Marketer Organization Facebook URL	{{ comarketer.organization.settings.social_facebook }}	
Co-Marketer Organization Twitter URL	{{ comarketer.organization.settings.social_twitter }}	
Co-Marketer Organization Youtube URL	{{ comarketer.organization.settings.social_youtube }}	
Co-Marketer Organization LinkedIn URL	{{ comarketer.organization.settings.social_linkedin }}	
Co-Marketer Organization Web Disclosure Text	{{ comarketer.organization.settings.web_disclosure_text }}	

Contact Placeholders

These placeholders populate from data provided for a contact who is on a journey. This information is drawn from the contact record and can be modified on the Edit Contact page.

Note
These placeholders are meant to be used in emails sent or tasks assigned in journeys. They refer to the contact moving through the workflow of the journey. They draw information from the same fields as the recipient fields below, but these will not work if used in an email or task outside of a journey.

Name	Placeholder	Location to Set Value
Contact Email	{{ contact.email }}	Edit Contact (contact details page)
Contact First Name	{{ contact.f_name }} If the contact has a Nickname defined, this placeholder populates from that field instead of the First Name field.	
Contact Last Name	{{ contact.l_name }}	
Contact Address Line 1	{{ contact.address }}	
Contact City	{{ contact.city }}	
Contact State	{{ contact.state }}	
Contact Zip Code	{{ contact.zipcode }}	

Recipient Placeholders

These placeholders populate from data provided for the contact receiving the email. This information is drawn from the contact record and can be modified on the Edit Contact page.

Name	Placeholder	Location to Set Value
Recipient Email	{{ recipient.email }}	Edit Contact (contact details page)
Recipient First Name	{{ recipient.f_name }} If the contact has a Nickname defined, this placeholder populates from that field instead of the First Name field.	
Recipient Last Name	{{ recipient.l_name }}	
Recipient Address Line 1	{{ recipient.address }}	
Recipient City	{{ recipient.city }}	
Recipient State	{{ recipient.state }}	
Recipient Zip Code	{{ recipient.zipcode }}	

Recipient Recruit Placeholders

The following additional recipient placeholders refer to recruiting fields in the contact's record.

Name	Placeholder	Location to Set Value
Recipient Recruit Regional Manager First Name	{{ recipient.recruit.stats.regional_manager_first_name }}	Edit Contact (contact details page)
Recipient Recruit Regional Manager Last Name	{{ recipient.recruit.stats.regional_manager_last_name }}	
Recipient Recruit Branch Manager First Name	{{ recipient.recruit.stats.branch_manager_first_name }}	
Recipient Recruit Branch Manager Last Name	{{ recipient.recruit.stats.branch_manager_last_name }}	
Recipient Recruit Division Manager First Name	{{ recipient.recruit.stats.division_manager_first_name }}	
Recipient Recruit Division Manager Last Name	{{ recipient.recruit.stats.division_manager_last_name }}	
Recipient Recruit Status Name	{{ recipient.recruit.stats.recruit_status_name }}	
Recipient Recruit Nmls Id	{{ recipient.recruit.stats.nmls_id }}	
Recipient Recruit Commission Split	{{ recipient.recruit.stats.commission_split }}	
Recipient Recruit Background	{{ recipient.recruit.stats.background }}	
Recipient Recruit Years Experience	{{ recipient.recruit.stats.years_experience }}	
Recipient Recruit Resume Url	{{ recipient.recruit.stats.resume_url }}	
Recipient Recruit Commission Cap	{{ recipient.recruit.stats.commission_cap }}	

Name	Placeholder	Location to Set Value
Recipient Recruit Corporate Objective	{{ recipient.recruit.stats.corporate_objective }}	
Recipient Recruit Sourced Percentage	{{ recipient.recruit.stats.sourced_percentage }}	

Loan Data Placeholders

The placeholders in the following sections populate data from a loan record. They must be used with in emails sent by event-driven actions in an auto-campaign. Specifically, you must set the Driving Event to **Loan Status Saved/Updated**. In that case, the loan whose status changes will be used to provide the data referenced by the placeholder.

You can optionally set one or more conditions so that the event is triggered only when a loan is given a specified status. If you do not set any conditions, the action will be triggered by any change to a loan status.

Borrower Placeholders

These placeholders populate from contact data provided for the primary borrower associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Borrower Email	{{ loan.borrower.email }}	borrower contact record
Borrower First Name	{{ loan.borrower.f_name }}	
Borrower Last Name	{{ loan.borrower.l_name }}	
Borrower Address Line 1	{{ loan.borrower.address }}	
Borrower Address Line 2	{{ loan.borrower.address_two }}	
Borrower City	{{ loan.borrower.city }}	
Borrower State	{{ loan.borrower.state }}	
Borrower Zip Code	{{ loan.borrower.zipcode }}	

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Co-Borrower Placeholders

These placeholders populate from contact data provided for the co-borrower associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Co-Borrower Email	{{ loan.coborrower.email }}	co-borrower contact record
Co-Borrower First Name	{{ loan.coborrower.f_name }}	
Co-Borrower Last Name	{{ loan.coborrower.l_name }}	
Co-Borrower Address Line 1	{{ loan.coborrower.address }}	
Co-Borrower Address Line 2	{{ loan.coborrower.address_two }}	
Co-Borrower City	{{ loan.coborrower.city }}	
Co-Borrower State	{{ loan.coborrower.state }}	
Co-Borrower Zip Code	{{ loan.coborrower.zipcode }}	

Attorney Placeholders

These placeholders populate from contact data provided for the attorney associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Attorney Email	{{ loan.attorney.email }}	attorney contact record
Attorney First Name	{{ loan.attorney.f_name }}	
Attorney Last Name	{{ loan.attorney.l_name }}	
Attorney Address Line 1	{{ loan.attorney.address }}	
Attorney Address Line 2	{{ loan.attorney.address_two }}	
Attorney City	{{ loan.attorney.city }}	
Attorney State	{{ loan.attorney.state }}	
Attorney Zip Code	{{ loan.attorney.zipcode }}	

Buyer's Agent Placeholders

These placeholders populate from contact data provided for the buyer's agent associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Buyer's Agent Email	{{ loan.buyers_agent.email }}	buyer's agent contact record
Buyer's Agent First Name	{{ loan.buyers_agent.f_name }}	
Buyer's Agent Last Name	{{ loan.buyers_agent.l_name }}	
Buyer's Agent Address Line 1	{{ loan.buyers_agent.address }}	
Buyer's Agent Address Line 2	{{ loan.buyers_agent.address_two }}	
Buyer's Agent City	{{ loan.buyers_agent.city }}	
Buyer's Agent State	{{ loan.buyers_agent.state }}	

Name	Placeholder	Location to Set Value
Buyer's Agent Zip Code	{{ loan.buyers_agent.zipcode }}	

Seller's Agent Placeholders

These placeholders populate from contact data provided for the seller's agent associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Seller's Agent Email	{{ loan.sellers_agent.email }}	seller's agent contact record
Seller's Agent First Name	{{ loan.sellers_agent.f_name }}	
Seller's Agent Last Name	{{ loan.sellers_agent.l_name }}	
Seller's Agent Address Line 1	{{ loan.sellers_agent.address }}	
Seller's Agent Address Line 2	{{ loan.sellers_agent.address_two }}	
Seller's Agent City	{{ loan.sellers_agent.city }}	
Seller's Agent State	{{ loan.sellers_agent.state }}	
Seller's Agent Zip Code	{{ loan.sellers_agent.zipcode }}	

Settlement Agent Placeholders

These placeholders populate from contact data provided for the settlement agent associated with the loan record that has triggered the auto-campaign action.

Name	Placeholder	Location to Set Value
Settlement Agent Email	{{ loan.settlement_agent.email }}	settlement agent contact record
Settlement Agent First Name	{{ loan.settlement_agent.f_name }}	
Settlement Agent Last Name	{{ loan.settlement_agent.l_name }}	
Settlement Agent Address Line 1	{{ loan.settlement_agent.address }}	
Settlement Agent Address Line 2	{{ loan.settlement_agent.address_two }}	
Settlement Agent City	{{ loan.settlement_agent.city }}	
Settlement Agent State	{{ loan.settlement_agent.state }}	
Settlement Agent Zip Code	{{ loan.settlement_agent.zipcode }}	

Additional Loan Placeholders

These placeholders populate directly from the loan record that has triggered the auto-campaign action.

Some of these can only be written to the loan record via an import or the API, not through the Total Expert UI.

Name	Placeholder	Location to Set Value
Loan Term	{{ loan.term }}	loan record, import, or API
Loan Amount	{{ loan.amount }}	
Loan Type	{{ loan.loan_type }}	

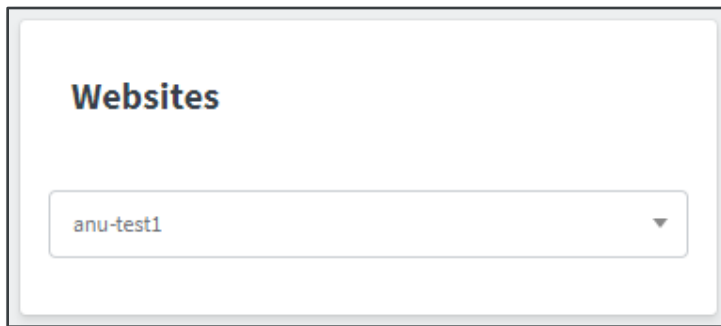| Name	Placeholder	Location to Set Value
Loan Status	{{ loan.loan_status }}	
Loan Purpose	{{ loan.loan_purpose }}	
Loan Program	{{ loan.loan_program }}	
Loan Rate	{{ loan.rate }}	
Loan Appraised Value	{{ loan.appraised_value }}	
Loan Purchase Price	{{ loan.purchase_price }}	
Loan Combined Loan-to-Value	{{ loan.loan_to_value_combined }}	
Loan-to-Value	{{ loan.loan_to_value }}	
Loan Application Number	{{ loan.application_number }}	
Loan Application Date	{{ loan.application_date }}	
Loan Credit Report Date	{{ loan.credit_report_date }}	
Loan Appraisal Received Date	{{ loan.appraisal_received_date }}	
Loan Appraisal Ordered Date	{{ loan.appraisal_ordered_date }}	
Loan Appraisal Expected Date	{{ loan.appraisal_expected_date }}	
Loan Annual Review Date	{{ loan.annual_review_date }}	
Loan ARM Expiration Date	{{ loan.loan_arm_expiration_date }}	
Loan Creation Date	{{ loan.created_date }}	
Loan Date	{{ loan.date }}	
Loan – Is Pre-Approval Issued	{{ loan.pre_approval_issued }}	
Loan Pre-Approval Issues	{{ loan.pre_approval_issues }}	
Loan Pre-Approval Issued Date	{{ loan.pre_approval_issued_date }}	
Loan Pre-Approval Expiration Date	{{ loan.pre_approval_expiration_date }}	
Loan Application Sent Date	{{ loan.application_sent_date }}	
Loan Application Received Date	{{ loan.application_received_date }}	
Loan Lock Date	{{ loan.lock_date }}	
Loan Lock Expire Date	{{ loan.lock_expire_date }}	
Loan Underwriting Approval Date	{{ loan.underwriting_approval_date }}	
Loan Underwriting Approval Date Estimated	{{ loan.underwriting_approval_date_estimated }}	
Loan Underwriting Submission Date	{{ loan.underwriting_submission_date }}	
Loan Underwriting Submission Date Estimated	{{ loan.underwriting_submission_date_estimated }}	
Loan Created At Date	{{ loan.created_at }}	
Loan Updated At Date	{{ loan.updated_at }}	
Loan Status Updated Date	{{ loan.status_updated_date }}	
Loan Deleted At Date	{{ loan.deleted_at }}	

Name	Placeholder	Location to Set Value
Loan Resubmittal Date	{{ loan.resubmittal_date }}	
Loan Audits Date	{{ loan.audits_date }}	
Loan Docs Out Date	{{ loan.docs_out_date }}	
Loan Funds Requested Date	{{ loan.funds_requested_date }}	
Loan Funding Date	{{ loan.funding_date }}	
Loan Post Closed Date	{{ loan.post_closed_date }}	
Loan Purchased Date	{{ loan.purchased_date }}	
Loan Completion Date	{{ loan.completion_date }}	
Loan Lien Position	{{ loan.lien_position }}	
Loan Approval Date	{{ loan.approval_date }}	
Loan Approval Date Estimated	{{ loan.approval_date_estimated }}	
Loan Closing Date	{{ loan.closing_date }}–	
Loan Closing Date Estimated	{{ loan.closing_date_estimated }}	
Loan Clear To Close Date	{{ loan.ctc_date }}	
Loan Documents Signed Date	{{ loan.documents_signed_date }}	
Loan First Payment Date	{{ loan.first_payment_date }}	
Loan EPO Date	{{ loan.epo_date }}	
Loan Funded Date	{{ loan.funded_date }}	
Loan External Last Modified Date	{{ loan.external_last_modified_date }}	
Loan Processing Start Date	{{ loan.processing_start_date }}	
Loan Processing Start Date Estimated	{{ loan.processing_start_date_estimated }}	
Loan Number	{{ loan.loan_number }}	
Loan Name	{{ loan.loan_name }}	
Loan – Is First Time Buyer	{{ loan.is_first_time_buyer }}	
Loan Property Type	{{ loan.property_type }}	
Loan Property Address 1	{{ loan.address_1 }}	
Loan Property Address 2	{{ loan.address_2 }}	
Loan Property City	{{ loan.city }}	
Loan Property State	{{ loan.state }}	
Loan Property Zip Code	{{ loan.zip }}	
Loan Occupancy	{{ loan.occupancy }}	
Loan Property County	{{ loan.county }}	
Loan Buy Down Points	{{ loan.buydown_points }}	
Loan Monthly Principal and Interest Payment	{{ loan.monthly_pi_payment }}	
Loan Monthly Principal and Interest With Minimum Payment	{{ loan.monthly_pi_with_mi_payment }}	

Name	Placeholder	Location to Set Value
Loan Investor	{{ loan.investor }}	
Loan Debt To Income Ratio	{{ loan.debt_to_income }}	
Closing Disclosure Out Date	{{ loan.closing_disclosure_out_date }}	
Closing Disclosure Signed Date	{{ loan.closing_disclosure_signed_date }}	
Loan Source	{{ loan.source }}	
Loan Estimated Value	{{ loan.estimated_value }}	
Loan Lock Status	{{ loan.lock_status }}	
Loan Escrow Waived	{{ loan.escrow_waived }}	
Loan Referral Source	{{ loan.referral_source }}	
Loan Referral Loan Officer	{{ loan.referral_loan_officer }}	
Loan Amort Type	{{ loan.amort_type }}	
Loan Amort Type Arm Desc	{{ loan.amort_type_arm_desc }}	

Dynamic Website Placeholders

These placeholders populate from a website specified in the drop-down menu in the Websites section as part of creating the template.

Dynamic website placeholders only appear in the Insert template dialog box for users with the **Dynamic Websites** permission enabled.

Name	Placeholder	Location to Set Value
Dynamic Websites: Site URL	{{ websites.url }}	attributes of the website selected by the user
Dynamic Websites: Clickable Link	{{ websites.url }} (with link automatically applied to the supplied text)	

Video Placeholders

These placeholders populate from a marketing video (such as BombBomb) specified by the user before sending the email. When creating an email template with video placeholders, you must check the **Video** checkbox in the Sections portion of the template creation page. If this is not checked, the user sending the email will not have an opportunity to select a video, and the placeholders will not have anything to populate.
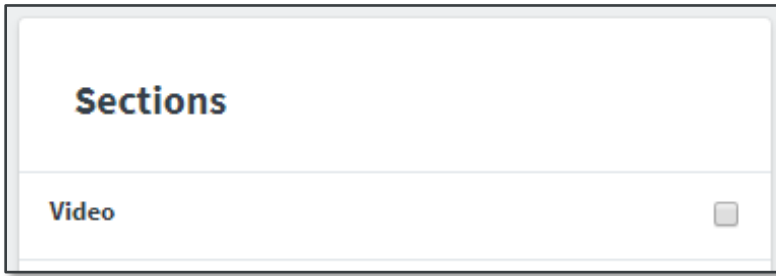
Video placeholders only appear in the Insert template dialog box for users with the **Create Video Email Template** permission enabled.

Name	Placeholder	Location to Set Value
Video URL	{{ video.video_url }}	attributes of the video selected by the user
Video Thumbnail URL	{{ video.thumb_url }}	
Video Embedded URL	{{ video.embedded_url }}	

Custom Placeholders

You can specify your own placeholders to use anywhere a standard placeholder can be used. Navigate to **Manage Marketing → Template Snippets** and click the **+Create** button. Specify a human-readable Name, a System Name, and the Content that you want to appear when the placeholder is used. In the example below, the Name is `My Snippet` and the system name is `my_snippet_1`.
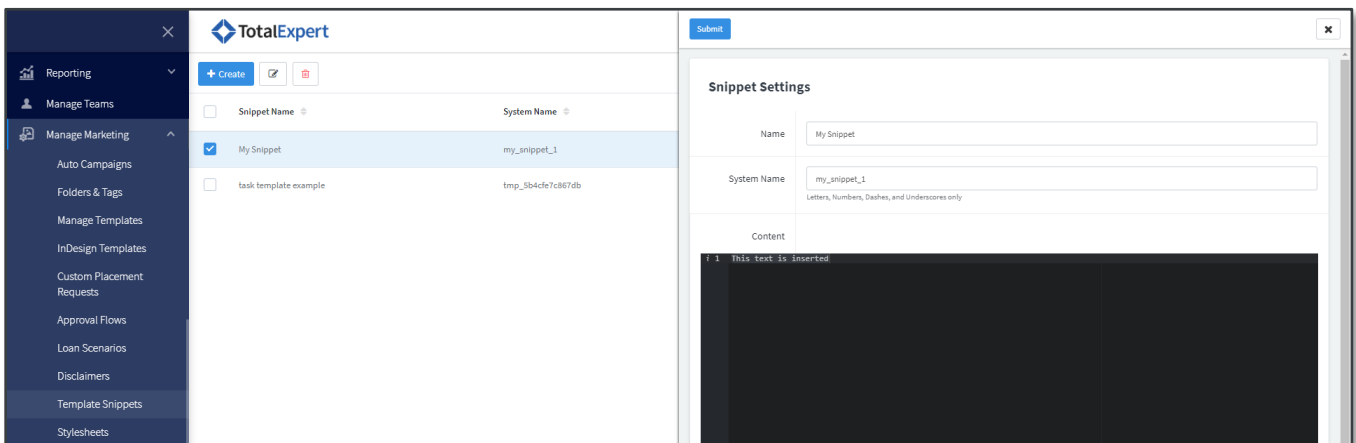
Name	Placeholder	Location to Set Value
User Snippet – [name]	{{ sender.snippets.[system name].content }}	Manage Marketing → Template Snippets

For example, if you create the custom template snippet above, it will show in the Insert template drop-down menu as *User Snippet – My Snippet* and the actual placeholder will be *{{ sender.snippets.my_snippet_1.content }}*.