



SMS Message Templates

Table of Contents

Introduction	2
Formatting in This Document.....	2
Templates	2
Opt-In Request	3
Opt-In Successful	3
User-to-Contact Message (Via a Journey or Bulk Send)	3
Contact-to-User Message.....	3
Conversational Message Via Web or Mobile App	4
Variables & Conditions.....	4
Variable: {ContactFullName}	4
Variable: {ContactPhoneCell}	4
Variable: {DefaultOptInKeyword}	4
Variable: {HelpText}	4
Variable: {Message}	5
Variable: {PrivacyPolicyUrl}	5
Variable: {UserDetailFullName}	5
Variable: {UserDisplayName}	5
Variable: {OrgName}	6
Variable: {LicenseTitle}	6
Condition: {AppendOrgName}	6
Condition: {AppendNmIsId}	6
Condition: [ShouldAppendHelpText]	6
Condition: [ShowDisplayName]	7
Examples	7
Opt-In Request	7
With Conditions = True.....	7
With Conditions = False.....	8
Opt-In Successful	8
User-to-Contact Message (Via a Journey or Bulk Send)	9



Contact-to-User Message.....	9
Organization Settings Referenced	10

Introduction

The Total Expert platform uses several templates for SMS messages sent and received. These templates allow boilerplate text and personalized information to be added to certain types of messages to improve the experience and ensure compliance. Some text is configured to be included only under certain conditions, further customizing your experience.

Formatting in This Document

Throughout this document, formatting is used to indicate the different behaviors of templates.

- Variables are placeholders in a message that are replaced by the appropriate value when the message is sent.
 - These are denoted by bold text in curly brackets: **{VariableName}**.
- Specific fields pull values from the database.
 - These are enclosed in curly brackets, but not bold: {field.name}.
- Conditional tests are evaluated to either true or false.
 - If the condition is true, then the text specified in the conditional statement is inserted when the message is sent.
 - If the condition is false, then the text is always simply skipped when the message is sent. (There is no alternate text used instead.)
 - The condition name is shown in bold text in square brackets: **[ConditionName]**.
 - The statement to evaluate as true or false is enclosed in parentheses: (if **[ConditionName]** is true).
 - The text to insert is enclosed in quotation marks. These marks are *not* inserted with the text they enclose: "Insert this text". This could include a variable, which would be treated the same as other variables if the condition is true.
 - The full conditional statement (including both the statement to evaluate and the text to include if it is true) is enclosed in angle brackets: <(if **[ConditionName]** is true), "Insert this text">.
- In the Examples section, color-coding is used to illustrate how the dynamic parts of the message are handled to construct the final message.

Templates

This section describes the templates used when a Total Expert user sends an SMS message from the platform. Unless otherwise noted, the same template is used for both 1-way and Engage SMS customers.

See Variables & Conditions below for details on the dynamic items used in these templates.

See Examples below for some examples of how a final message is constructed from these templates.



Opt-In Request

This is the full message that is delivered by TE on behalf of a user to their contact in the event they want to text that contact; the contact must reply in the affirmative before any other messages can be sent (other than another opt-in request after an appropriate interval).

Text **{DefaultOptInKeyword}** to confirm that you would like to receive SMS messages from **{UserDisplayName}**. For more info, visit **{PrivacyPolicyUrl}**. Msg & data rates may apply.

Opt-In Successful

This is the full message that the contact receives in the same thread after they reply in the affirmative to the opt-in request described above. This would simply be a confirmation to the contact that their affirmative response was received.

You're all set to receive text messages from **{UserDetailFullName}**.

{HelpText}

User-to-Contact Message (Via a Journey or Bulk Send)

This is the actual message received by the TE user's contact when using 1-way messaging or when using Engage SMS to send a message from a journey or to a bulk list of recipients.

When Engage SMS is used for a manual, one-off message to a single contact, the Conversational Message template below is used.

```
<(if [ShowDisplayName] is true), "{UserDisplayName} ">{Message}
<(if [ShouldAppendHelpText] is true), "{HelpText}">
```

Contact-to-User Message

This is what is recorded by Total Expert when a contact replies to a message sent using 1-way messaging. Since these are not threaded with the outgoing messages, the person's name and number are appended to ensure the message has proper context.

Note

This is *not* used by Engage SMS.

{ContactFullName}: {Message}

{ContactPhoneCell}



Conversational Message Via Web or Mobile App

This is what is recorded by Total Expert when a message is sent in either direction using Engage SMS. It consists of only the message itself with nothing appended.

Note

This is *not* used by 1-way messaging.

{Message}

Variables & Conditions

The following section describes, in detail, each of the dynamic elements from the templates above.

Variable: {ContactFullName}

This variable inserts the first and last names (with a space in between) stored in the contact record of the person receiving the message.

{leads.f_name} {leads.l_name}

This variable is used by:

- Contact-to-User Message

Variable: {ContactPhoneCell}

This variable inserts the cell phone number stored in the contact record of the person receiving the message.

{leads.phone_cell}

This variable is used by:

- Contact-to-User Message

Variable: {DefaultOptInKeyword}

This variable is hard-coded and takes no other values.

YES

This variable is used by:

- Opt-In Request

Variable: {HelpText}

This variable inserts the string stored as the value of the organization setting `sms.help_text` as set by the the organization of the user sending the message. The default value of this setting is:



Reply "HELP" for help. To unsubscribe, reply "STOP". Msg frequency will vary by need.

Note

In this case, the quotation marks are part of the text string, and would be included in the message.

This variable is used by:

- Opt-In Successful
- User-to-Contact Message (Via a Journey or Bulk Send)

Variable: {Message}

This variable consists entirely of the message being sent by either party. It is used by:

- User-to-Contact Message (Via a Journey or Bulk Send)
- Contact-to-User Message

Variable: {PrivacyPolicyUrl}

This variable inserts the string stored as the value of the organization setting `organization_settings_marketing.privacy_policy_url` as set by the the organization of the user sending the message. The default value of this setting is:

`https://www.totalexpert.com/privacy-policy`

This variable is used by:

- Opt-In Request

Variable: {UserDetailFullName}

This variable inserts the first and last names (with a space in between) stored in the user settings of the user sending the message.

`{user_info.f_name} {user_info.l_name}`

This variable is used by:

- Opt-In Request
- Opt-In Successful
- {UserDisplayName} (variable, see below)

Variable: {UserDisplayName}

This variable consists of a template in its own right. It contains 3 variables, but the last 2 are only shown if the conditional checks are true.



```
{UserDetailFullName}<(if [AppendOrgName] is true)," | {OrgName}"><(if [AppendNmIsId] is true)," | NMLSID#{LicenseTitle}">
```

This variable is used by:

- Opt-In Request
- User-to-Contact Message (Via a Journey or Bulk Send)

In addition to the **{UserDetailFullName}** variable described above, this variable uses 2 other variables and 2 conditions that are not referenced elsewhere:

Variable: {OrgName}

This variable inserts the name stored in the database for the organization of the user sending the message.

```
{organizations.name}
```

Variable: {LicenseTitle}

This variable inserts the NMLS ID number stored in the marketing settings of the user sending the message.

```
{user_settings_marketing.license_title}
```

Condition: {AppendOrgName}

This condition is considered true if the organization setting **sms.append.org_name** is true for the user's organization.

If this setting is false, the **{OrgName}** variable and associated spacing text are omitted from the result rendered for the **{UserDisplayName}** variable.

Condition: {AppendNmIsId}

This condition is considered true only if both of the following are true:

- The organization setting **sms.append.nmIsId** is true for the user's organization.
- The User Type for the user is set to **Lender**.

If either (or both) of these is false, the **{LicenseTitle}** variable and associated spacing text are omitted from the result rendered for the **{UserDisplayName}** variable.

Condition: [ShouldAppendHelpText]

This condition is considered true if either (or both) of the following is true:

- The message is being sent from a journey.
- The secondary condition **[AppendHelpTextBulk]** is true.
 - **[AppendHelpTextBulk]** is considered true if the organization setting **sms.append.help_text_bulk** is true for the user's organization.



If both of these are false, then the `{Help Text}` variable is omitted from the User-to-Contact Message (Via a Journey or Bulk Send) template.

Condition: `[ShowDisplayName]`

This condition is considered true if the organization setting `sms.prepend.user_first_and_last_name` is set to `default` for the user's organization.

- If this organization setting is set to `none`, then the following things happen:
 - The `{UserDisplayName}` variable is omitted.
 - Each time a user is about to send an SMS, they are prompted in the UI with the following message:

To help ensure compliance with TCPA please identify yourself and your organization in the body of the text message. This is especially important if this is the first message in a new conversation.

- If this organization setting is set to any value other than `default` or `none`, then it likely will not function in a coherent way, and the `{UserDisplayName}` variable would be omitted from the User-to-Contact Message (Via a Journey or Bulk Send) template.

Examples

The following examples use color-coding to help visualize how variables are used to populate information into the message templates. (This is illustrative only; messages are not sent with colored text.) In each case, the base template is re-stated, followed by the values used for each of the variables and conditions in the template.

Opt-In Request

With Conditions = True

Text `{DefaultOptInKeyword}` to confirm that you would like to receive SMS messages from `{UserDisplayName}`. For more info, visit `{PrivacyPolicyUrl}`. Msg & data rates may apply.

Variable values:

- `{DefaultOptInKeyword}` = hardcoded to `YES`
- `{UserDisplayName}` =

```
{UserDetailFullName}<(if [AppendOrgName] is true)," | {OrgName}"><(if [AppendNmIsId] is true)," | NMLSID#{LicenseTitle}">
```

- `{UserDetailFullName}` = `{user_info.f_name} {user_info.l_name}`
 - `{user_info.f_name}` = `Pat`
 - `{user_info.l_name}` = `Smith`
- `{OrgName}` = `{organizations.name}`
 - `{organizations.name}` = `ABCCorp`
- `{LicenseTitle}` = `{user_settings_marketing.license_title}`



- `{user_settings_marketing.license_title} = 1234567`
- **[AppendOrgName]:**
 - `sms.append.org_name = true`
 - Therefore **[AppendOrgName]** evaluates as true.
- **[AppendNmIsId]:**
 - `sms.append.nmIsId = true`
 - User Type = Lender
 - Therefore **[AppendNmIsId]** evaluates as true.
- **{PrivacyPolicyUrl}** = `https://www.totalexpert.com/privacy-policy`

Using the values listed above, the sub-template variable **{UserDisplayName}** would look like this:

```
Pat Smith | ABCorp | NMLS ID #1234567
```

And the final message would look like this:

```
Text YES to confirm that you would like to receive SMS messages from Pat Smith
| ABCorp | NMLS ID #1234567. For more info, visit
https://www.totalexpert.com/privacy-policy. Msg & data rates may apply.
```

With Conditions = False

In the above example, suppose both `sms.append.org_name` and `sms.append.nmIsId` are set to false. That means both **[AppendOrgName]** and **[AppendNmIsId]** evaluate as false. With these changes, **{UserDisplayName}** would look like this:

```
Pat Smith
```

And the final message would look like this:

```
Text YES to confirm that you would like to receive SMS messages from Pat Smith.
For more info, visit https://www.totalexpert.com/privacy-policy. Msg & data
rates may apply.
```

Opt-In Successful

You're all set to receive text messages from **{UserDetailFullName}**.

{HelpText}

- **{UserDetailFullName}** = same as previous example (with true conditions)
- **{HelpText}** = Reply "HELP" for help. To unsubscribe, reply "STOP". Msg frequency will vary by need.



The final message would look like this:

You're all set to receive text messages from Pat Smith | ABCorp | NMLS ID #1234567.

Reply "HELP" for help. To unsubscribe, reply "STOP". Msg frequency will vary by need.

User-to-Contact Message (Via a Journey or Bulk Send)

```
<(if [ShowDisplayName] is true), "{UserDisplayName} ">{Message}
```

```
<(if [ShouldAppendHelpText] is true), "{HelpText}">
```

- **{UserDetailFullName}** = same as previous example (with true conditions)
 - **[ShowDisplayName]**:
 - sms.prepend.user_first_and_last_name = default
 - Therefore **[ShowDisplayName]** evaluates as true.
- **{Message}** = Hello, world!
- **{HelpText}** = Reply "HELP" for help. To unsubscribe, reply "STOP". Msg frequency will vary by need.
 - **[ShouldAppendHelpText]**:
 - The message is *not* being sent from a journey, *but*:
 - **[AppendHelpTextBulk]** = sms.append.help_text_bulk = true
 - Therefore **[ShouldAppendHelpText]** evaluates as true.

The final message would look like this:

Pat Smith | ABCorp | NMLS ID #1234567 Hello, world!

Reply "HELP" for help. To unsubscribe, reply "STOP". Msg frequency will vary by need.

Contact-to-User Message

```
{ContactFullName}: {Message}
```

```
{ContactPhoneCell}
```

- **{ContactFullName}** = {leads.f_name} {leads.l_name}
 - {leads.f_name} = Chris
 - {leads.l_name} = Johnson
- **{Message}** = Hello, world!
- **{ContactPhoneCell}** = {leads.phone_cell}
 - {leads.phone_cell} = (123) 456-7890



The final message would look like this:

```
Chris Johnson: Hello, world!  
  
(123) 456-7890
```

Organization Settings Referenced

Name	Type	Used By
sms.append.nmls_id	Boolean	Condition: {AppendNmlsId}
sms.append.org_name	Boolean	Condition: {AppendOrgName}
sms.append.help_text_bulk	Boolean	[AppendHelpTextBulk] – part of Condition: [ShouldAppendHelpText]
sms.help_text	string	Variable: {HelpText}
organization_settings_marketing. privacy_policy_url	string	Variable: {PrivacyPolicyUrl}
sms.prepend.user_first_and_last_name	string	Condition: [ShowDisplayName]