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## About Merge Fields

Merge fields are used to dynamically include content from your practice into your documents and automations.

For example, using the merge field of «Client Name » on a Word Template will allow users to easily create a document with the Client’s Name inserted when the document is created, rather than having to manually enter the information each time.

Merge fields use different brackets depending on where the merge field is used, for example, Word, Excel, or FYI. Refer to the “Types of Brackets” section below for more information. The type of brackets to use have been included with each merge field in this document.

### Using Merge Fields

Merge Fields can be used in FYI in several places. Click the links below to view detailed step-by-step instructions:

* [Templates and Stationery](https://support.fyidocs.com/hc/en-us/sections/360002418831-Templates-and-Stationery)
* [***Templates and Signatures for Email***](https://support.fyidocs.com/hc/en-us/sections/360006814451-Templates-and-Signatures-for-Email)
* [Digital Signatures using Annature](https://support.fyidocs.com/hc/en-us/articles/360048419391-Digital-Signatures-using-Annature)
* [Digital Signatures using FuseSign](https://support.fyidocs.com/hc/en-us/articles/360054510951-Digital-Signatures-using-FuseSign)
* [***Inserting your Signature into a Document***](https://support.fyidocs.com/hc/en-us/articles/360029241692-Inserting-your-Signature-into-a-Document)
* [***Including Advanced Tax-Related Merge Fields in Word and Excel Templates***](https://support.fyidocs.com/hc/en-us/articles/360039345412-Including-Advanced-Tax-Related-Merge-Fields-in-Word-Templates)
* [***Including Merge Names in Excel Templates***](https://support.fyidocs.com/hc/en-us/articles/11205709691161)
* [***Process Automation***](https://support.fyidocs.com/hc/en-us/categories/360001507951)
* [***Process Step Details - Updating Clients, Creating and Updating Jobs***](https://support.fyidocs.com/hc/en-us/articles/8454267343129)
* [***Including Merge Fields in Email Templates and Signatures***](https://support.fyidocs.com/hc/en-us/articles/360052395852)

### Types of Brackets

Depending on where the merge fields are being used, the merge fields will need to be inserted using either angled brackets, or curly brackets.

* **Angled brackets** - « (merge field) »
* **Curly brackets** - {{ (merge field) }}

Ensure there is a space between the brackets and the merge field.

Where a specific bracket type is required, the Merge Field will be displayed with the appropriate brackets in the document below and in the online Help Centre articles.

**Note:** In a spreadsheet, the Merge Fields are inserted using the Excel Merge Names feature and will be displayed without any brackets at all. Ensure you follow the instructions in the article [Including Merge Names in Excel Templates](https://support.fyidocs.com/hc/en-us/articles/11205709691161) to ensure the merge fields function correctly.

### Quotation Marks

When entering in advanced formulas for Merge Fields, you may need to enter quotation marks as part of the formula.

For example:

{{"now" | date: "%d %B %Y"}}

It’s important to note that these formulas use the quotation mark found on the keyboard, and not a Unicode symbol. If the correct quotation marks are not used, it can cause an error or unexpected behaviour in FYI.

Hold shift and press the quotation key on the keyboard to enter this character.

### Using Custom Fields to create Merge Fields

If you have set up Custom Fields in your practice management software, UDFs in GreatSoft, or added Custom Fields directly in FYI, you can include Merge Fields in your documents.

**Note:** Custom Fields for Xero Practice Manager only retrieve data from the Client, and not Jobs.

For detailed instructions on using Custom Fields, refer to the guides linked in the section Using Merge Fields.

The Field names must be entered as follows:

* **Prefix** the Merge Field with "custom\_" (Spreadsheets with Merge Names will have the prefix of “FYI\_custom\_”)
* The Field name must **exactly match the Custom Field name** in your practice management software or as set up in FYI.
* For Custom Field names with spaces, **replace the space** with an underscore (\_).
* **Remove special characters** from Custom Field names like full stops (.) or any other special characters (such as , or &).

For example:

* For a Custom Field **Types**, the Merge Field Name is entered as “custom\_Types”(in Excel this would be “FYI\_custom\_Types”)
* For a Custom Field **Skype Call**, the Merge Field Name is entered as “custom\_Skype\_Call” (in Excel this would be “FYI\_custom\_Skype\_Call”).
* For a Custom Field **z2.1**. Name, the Merge Field Name is entered as “custom\_z21\_Name” (in Excel this would be “FYI\_custom\_z21\_Name”).

## Emails Templates and Signatures

When Merge Fields are added to the Email Template or Stationery, they are added in a specific format, for example, {{ FirstName }} for the addressee's first name, or {{ AuthorName }} for the author's name.

The Merge Fields need the correct character for the opening and closing curly brackets and also need a space after the opening curly brackets and before the closing curly brackets.

Merge fields can be added from within FYI using the Merge Field Groups in the Email Editor.

A screenshot of a computer

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Refer to Including Merge Fields in [Email Templates and Signatures](https://support.fyidocs.com/hc/en-us/articles/360052395852). More information on each of these fields can be found in

### Custom Fields

Emails also support Custom Fields, found in the **Custom** section of the Merge Field Groups.

### Advanced Merge Fields

For more advanced merge fields, you can use filters to format the date, add text, or perform calculations. For example, insert the current year, or calculate the date two months from now.

Refer to the section Advanced Merge Fields and Formatting below on page 29.

## Stationery and Templates for Word Documents

An FYI Admin, or any user in a User Group that has permissions enabled for Templates, can set up stationery and templates for emails and documents using the Merge Fields listed below.

**Note:** When adding a Merge Field directly within the contents of the Word document, the angled brackets must be used: « and ».

For detailed instructions, refer to the articles in the sections [***Templates and Stationer****y*](https://support.fyidocs.com/hc/en-us/sections/360002418831-Templates-and-Stationery) and [Templates and Signatures for Email](https://support.fyidocs.com/hc/en-us/sections/360006814451-Templates-and-Signatures-for-Email).

### Client Merge Fields

The following merge fields retrieve information that is held for the client in FYI synced from practice management software such as Xero Practice Manager and GreatSoft.

When editing the template details in FYI, you can add Client Merge Fields to the Name field to personalise the name of the document created from the template. The Merge Field’s angled brackets must be replaced with curly brackets {{ and }}, with a space after the opening bracket and before the closing bracket. For example, to add the client name to the name of an Engagement Letter document, the merge field would be added as “Engagement Letter – {{ Client Name }}”. Refer to [Creating Templates for Word, Spreadsheet or Presentation](https://support.fyidocs.com/hc/en-us/articles/360018528351).

| **Microsoft Word** | **Description** |
| --- | --- |
| «Addressee» | Addressee (as held for the primary contact) |
| «BankName» | Financial Institution Name (Bank Name) |
| «BankAccountName» | Bank Account Name |
| «BankAccountNumber» | Account Number (number of client's bank account) |
| «BankBSB» | BSB Number (BSB of client's bank account) |
| «BusinessNumber» | ABN (Australian Business Number) |
| «BusinessStructure» | Business Structure (for example, Individual, Partnership) |
| «ClientCode» | Client Code |
| «ClientName» | Client Name – the name of the company (matches the Name merge field), and not the first/last name of the client. |
| «ContactName» | Contact Name (name of the primary contact) |
| «CompanyNumber» | ACN (Australian Company Number) |
| «DateOfBirth» | Client's Date of Birth |
| «Email» | Client’s Email |
| «ExportCode» | Export Code |
| «Fax» | Client's Fax |
| «FirstName» | Client’s First Name |
| «LastName» | Client’s Last Name |
| «Manager» | Manager (the user who is the Manager responsible for the client) |
| «ManagerEmail» | Manager's Email |
| «ManagerMobile» | Manager's Phone |
| «ManagerPhone» | Manager's Phone |
| «ManagerRole» | Manager's Role (role of the Partner responsible for the client) |
| «Mobile» | Client’s Mobile |
| «Name» | Entity Name |
| «OtherName» | Client's Middle or Other Name |
| «Partner» | Partner Name (Partner responsible for the client) |
| «PartnerEmail» | Partner's Email |
| «PartnerMobile» | Partner's Mobile |
| «PartnerPhone» | Partner's Phone |
| «PartnerRole» | Partner's Role (role of the Partner responsible for the client) |
| «Phone» | Client’s Phone |
| «PostalAddress» | Postal Address (client's postal address) |
| «PostalCity» | Postal City |
| «PostalCountry» | Postal Country |
| «PostalPostcode» | Postal Postcode |
| «PostalRegion» | Postal Region |
| «Salutation» | Salutation (from primary contact) |
| «StreetAddress» | Physical Address (client's address) |
| «StreetCity» | Physical City |
| «StreetCountry» | Physical Country |
| «StreetPostcode» | Physical Postcode |
| «StreetRegion» | Physical Region |
| «Title» | Client's Title (Mr, Mrs, etc) |

### Document Merge Fields

The following merge Fields retrieve information from the document in FYI.

| **Document Merge Field** | **Description** |
| --- | --- |
| «CreatedDate» | Created Date (date on which a document was created) |
| «OwnerEmail» | Owner Email |
| «OwnerMobile» | Owner Mobile |
| «OwnerName» | Owner Name (user who is the creator of the document) |
| «OwnerPhone» | Owner Phone |
| «OwnerRole» | Owner Role (from the documents creator's FYI User Profile) |
| «OwnerQualifications» | Owner Qualifications |
| «ReferenceNumber» | Reference Number - from the FYI document |

### Collaborate Links

If using Collaborate in FYI to share documents and folders with your clients, you can insert merge fields on emails and documents.

These links will only be available after the Collaborate site has been created, and if the recipient has been shared access to a document or added to the Sharing Settings.

| **Merge Field** | **Description** |
| --- | --- |
| «AttachmentLinks» | A link to the document on the Collaborate Site |
| «CollaborateSiteLink | web\_link» | Sends a link to the Collaborate site home page |
| «UploadFolderLink» | Update Folder Link (link to the Collaborate Upload folder for clients to upload documents) |

### Digital Signing Merge Fields (Annature Only)

When sending documents for signature via Annature, you must ensure the document you send has the Signature Merge Field included. Refer to [***Digital Signatures using Annature***](https://support.fyidocs.com/hc/en-us/articles/360048419391-Digital-Signatures-using-Annature).

The **Signature** Merge Field is automatically detected as a placeholder where the recipient must sign. **This does not show the sender's signature**. If you want to add your pre-set signature to the document when sending it, you need to add it to the document. Refer to [Inserting your Signature into a Document](https://support.fyidocs.com/hc/en-us/articles/360029241692-Inserting-your-Signature-into-a-Document).

| **Signature Merge Field** | **Description** |
| --- | --- |
| «Signature» | Signature |

### Tax Merge Fields (Xero Tax)

When creating a template for Word, you can include custom merge fields that are based on tax information from Xero Tax.

These fields are used in the FYI pre-figured processes for Tax Assessments which are triggered by tax returns and assessments from Xero Tax. If these Tax Merge Fields are used in any other processes (such as Custom Processes) or if a template with the Tax Merge Fields is used when creating a new document, they will retrieve the data from the most recent Tax Return or Assessment.

Tax Merge Fields are not available to use for Activity Statements.

| **Tax Merge Field** | **Description** |
| --- | --- |
| «Tax\_EstimatedIncome» | Estimated Income (the amount of the estimated income tax) |
| «Tax\_EstimatedPayableRefundable» | Estimated Payable Refundable (the amount of the estimated refund that is payable) |
| «Tax\_Income» | Income (the amount of the income tax) |
| «Tax\_IncomeVariance» | Income Variance (the amount of the variance from estimate of the income tax) |
| «Tax\_Issue» | Issue (the date it was issued by the ATO) |
| «Tax\_Lodgement» | Lodgement (the date it was logged to the ATO) |
| «Tax\_PayableDate» | Payable Date (the date the tax is payable) |
| «Tax\_PayableRefundable» | Payable Refundable (the amount of the refund that is payable) |
| «Tax\_PayableRefundableVariance» | PayableRefundableVariance (the amount of the variance from estimate of the refund that is payable) |
| «Tax\_PeriodFrom» | Period From (the from date of the period) |
| «Tax\_PeriodTo» | Period To (the to date of the period) |
| «Tax\_State» | State (the state of the tax submission, that is, Draft, Filed, Completed) |
| «Tax\_Type» | Type |
| «Tax\_Amount» | Amount |
| «Tax\_Year» | The most recent year listed in the Client – Tax tab. |

### Advanced Tax Merge Fields

The structure of Advanced Tax Merge Fields is as follows:

«Tax\_'**TaxType'\_'Year'\_'Field'**»

**Note:** If the Year or TaxType are not supplied, default values will be used.

Refer to [Including Advanced Tax-Related Merge Fields in Word and Excel Templates](https://support.fyidocs.com/hc/en-us/articles/360039345412-Including-Advanced-Tax-Related-Merge-Fields-in-Word-Templates).

|  |  |  |
| --- | --- | --- |
| **‘Tax Type’** | | **‘Year’** |
| SMSF | SMSF | 2020 |
| ITR | Income Tax | 2019 |
| CTR | Company Return | 2017 |
| TRT | Trust Return | 2016 |
| PTR | Partnership Return | 2015 |

Examples:

* Your 2020 tax from «Tax\_SMSF\_2020\_PeriodFrom» to «Tax\_SMSF\_2020\_PeriodTo» is estimated to be «Tax\_SMSF\_2020\_EstimatedPayableRefundable»
* Your 2020 income tax return from «Tax\_ITR\_2020\_PeriodFrom» to
* «Tax\_ITR\_2020\_PeriodTo» was lodged with the ATO on «Tax\_ITR\_2020\_ Lodgement»

| **Tax Merge Field** | **Description** | | |
| --- | --- | --- | --- |
| «Tax\_ITR\_2020\_EstimatedIncome» | Individual (ITR) | 2020 | Estimated Income |
| «Tax\_ITR\_2020\_Income» | Individual (ITR) | 2020 | Assessed Income |
| «Tax\_ITR\_2020\_IncomeVariance» | Individual (ITR) | 2020 | Income Variance |
| «Tax\_ITR\_2020\_Lodgement» | Individual (ITR) | 2020 | Lodgement Date |
| «Tax\_ITR\_2020\_PeriodFrom» | Individual (ITR) | 2020 | Period From |
| «Tax\_ITR\_2020\_PeriodTo» | Individual (ITR) | 2020 | Period To |

### Custom Fields

Word Documents also support Custom Fields, for example, «custom\_Client\_Level». Refer to the section Using Custom Fields to create Merge Fields on page 5.

### Advanced Merge Fields

Advanced formatting and calculations can be used for Merge Fields:

* **within the document** using Microsoft Word’s Conditional Formatting within the document. Refer to Microsoft Word Conditional Merge Fields and Microsoft Word CreatedDate Merge Field Formatting on page 32.
* when **editing the template details** within FYI using curly brackets, {{ and }} to format the date, add text, or perform calculations. For example, customise the Name to add the year to the name of documents created from the template. Refer to Advanced Merge Fields and Formatting below on page 29.

## Spreadsheets

Spreadsheets can be configured to use **Merge Names** using the Name Manager in Excel, or using **Merge Fields** using the same codes used in Email Templates. Merge Fields cannot be used in spreadsheets that contain macros (.xlsm).

**Note:** Merge Names using the Name Manager is the recommended method.

An FYI Administrator or any user in a User Group that has permissions enabled for Templates, can set up templates for Spreadsheets using the **Merge Fields** or **Merge Names** listed below. Merge Fields are inserted using the Curly Brackets, while Merge Names are inserted using the Name Manager in Excel.

Both methods are covered in our Help Centre, for detailed instructions refer to:

* [Including Merge Fields in Excel Templates.](https://support.fyidocs.com/hc/en-us/articles/360042615651)
* [Including Merge Names in Excel Templates](https://support.fyidocs.com/hc/en-us/articles/11205709691161).

### Client

The following Merge Names retrieve information that is held for the client in FYI. This is synced from practice management software such as Xero Practice Manager and Greatsoft.

| **Client Merge Field** | **Client Merge Name** | **Description** |
| --- | --- | --- |
| {{ Addressee }} | FYI\_Addressee | Addressee (as held for the primary contact) |
| {{ BankName }} | FYI\_BankName | Financial Institution Name (Bank Name) |
| {{ BankAccountName }} | FYI\_BankAccountName | Bank Account Name |
| {{ BankAccountNumber }} | FYI\_BankAccountNumber | Account Number (number of client's bank account) |
| {{ BankBSB }} | FYI\_BankBSB | BSB Number (BSB of client's bank account) |
| {{ BusinessNumber }} | FYI\_BusinessNumber | ABN (Australian Business Number) |
| {{ BusinessStructure }} | FYI\_BusinessStructure | Business Structure (for example, Individual, Partnership) |
| {{ ClientCode }} | FYI\_ClientCode | Client Code |
| {{ ClientName }} | FYI\_ClientName | Client Name - the name of the company (matches the Name merge field), and not the first/last name of the client. |
| {{ ContactName }} | FYI\_ContactName | Contact Name (name of the primary contact) |
| {{ CompanyNumber }} | FYI\_CompanyNumber | ACN (Australian Company Number) |
| {{ DateOfBirth }} | FYI\_DateOfBirth | Client's Date of Birth |
| {{ Email }} | FYI\_Email | Client’s Email |
| {{ ExportCode }} | FYI\_ExportCode | Export Code |
| {{ Fax }} | FYI\_Fax | Client's Fax |
| {{ FirstName }} | FYI\_FirstName | Client’s First Name |
| {{ LastName }} | FYI\_LastName | Client’s Last Name |
| {{ Manager }} | FYI\_Manager | Manager (user who is the Manager responsible for the client) |
| {{ ManagerEmail }} | FYI\_ManagerEmail | Manager's Email |
| {{ ManagerMobile }} | FYI\_ManagerMobile | Manager's Mobile Phone |
| {{ ManagerPhone }} | FYI\_ManagerPhone | Manager's Phone |
| {{ ManagerRole }} | FYI\_ManagerRole | Manager's Role (role of the Partner responsible for the client) |
| {{ Mobile }} | FYI\_Mobile | Client’s Mobile |
| {{ Name }} | FYI\_Name | Entity Name |
| {{ OtherName }} | FYI\_OtherName | Client's Middle or Other Name |
| {{ Partner }} | FYI\_Partner | Partner Name (Partner responsible for the client) |
| {{ PartnerEmail }} | FYI\_PartnerEmail | Partner's Email |
| {{ PartnerMobile }} | FYI\_PartnerMobile | Partner's Mobile |
| {{ PartnerMobile }} | FYI\_PartnerPhone | Partner's Phone |
| {{ PartnerMobile }} | FYI\_PartnerRole | Partner's Role (role of the Partner responsible for the client) |
| {{ Phone }} | FYI\_Phone | Client’s Phone |
| {{ PostalAddress }} | FYI\_PostalAddress | Postal Address (client's postal address) |
| {{ PostalCity }} | FYI\_PostalCity | Postal City |
| {{ PostalCountry }} | FYI\_PostalCountry | Postal Country |
| {{ PostalPostcode }} | FYI\_PostalPostcode | Postal Postcode |
| {{ PostalRegion }} | FYI\_PostalRegion | Postal Region |
| {{ Salutation }} | FYI\_Salutation | Salutation (from primary contact) |
| {{ StreetAddress }} | FYI\_StreetAddress | Physical Address (client's address) |
| {{ StreetCity }} | FYI\_StreetCity | Physical City |
| {{ StreetCountry }} | FYI\_StreetCountry | Physical Country |
| {{ StreetPostcode }} | FYI\_StreetPostcode | Physical Postcode |
| {{ StreetRegion }} | FYI\_StreetRegion | Physical Region |
| {{ Title }} | FYI\_Title | Client's Title (Mr, Mrs, etc) |

### Document Merge Names

The following Merge Names retrieve information from the document in FYI.

| **Document Merge Field** | **Document Merge Name** | **Description** |
| --- | --- | --- |
| {{ CreatedDate }} | FYI\_CreatedDate | Created Date (date on which a document was created) |
| {{ OwnerEmail }} | FYI\_OwnerEmail | Owner Email |
| {{ OwnerMobile }} | FYI\_OwnerMobile | Owner Mobile |
| {{ OwnerName }} | FYI\_OwnerName | Owner Name (user who is the creator of the document) |
| {{ OwnerPhone }} | FYI\_OwnerPhone | Owner Phone |
| {{ OwnerRole }} | FYI\_OwnerRole | Owner Role (from the documents creator's FYI User Profile) |
| {{ OwnerQualifications }} | FYI\_OwnerQualifications | Owner Qualifications |
| {{ ReferenceNumber }} | FYI\_ReferenceNumber | Reference Number - from the FYI document |

### Collaborate Links

If using Collaborate in FYI to share documents and folders with your clients, you can insert merge fields on emails and documents.

These links will only be available after the Collaborate site has been created, and if the recipient has been shared access to a document or added to the Sharing Settings.

| **Collaborate Merge Field** | **Collaborate Merge Name** | **Description** |
| --- | --- | --- |
| {{ AttachmentLinks }} | FYI\_AttachmentLinks | A link to the document on the Collaborate Site |
| {{ CollaborateSiteLink | web\_link }} | FYI\_ CollaborateSiteLink | web\_link | Sends a link to the Collaborate site home page |
| {{ UploadFolderLink }} | FYI\_UploadFolderLink | Update Folder Link (link to the Collaborate Upload folder for clients to upload documents) |

### Tax Merge Fields (Xero Tax)

When creating a Spreadsheet Template for Word, you can include custom merge fields that are based on tax information from Xero Tax.

These fields are used in the FYI pre-figured processes for Tax Assessments which are triggered by tax returns and assessments from Xero Tax. If these Tax Merge Fields are used in any other processes (such as Custom Processes) or if a template with the Tax Merge Fields is used when creating a new Spreadsheet, they will retrieve the data from the most recent Tax Return or Assessment.

Tax Merge Fields are not available to use for Activity Statements.

| **Tax Merge Field** | **Tax Merge Name** | **Description** |
| --- | --- | --- |
| {{ EstimatedIncome }} | FYI\_Tax\_EstimatedIncome | Estimated Income (the amount of the estimated income tax) |
| {{ Tax\_EstimatedPayableRefundable }} | FYI\_Tax\_EstimatedPayableRefundable | Estimated Payable Refundable (the amount of the estimated refund that is payable) |
| {{ Tax\_Income }} | FYI\_Tax\_Income | Income (the amount of the income tax) |
| {{ Tax\_IncomeVariance }} | FYI\_Tax\_IncomeVariance | Income Variance (the amount of the variance from estimate of the income tax) |
| {{ Tax\_Issue }} | FYI\_Tax\_Issue | Issue (the date it was issued by the ATO) |
| {{ Tax\_Lodgement }} | FYI\_Tax\_Lodgement | Lodgement (the date it was logged to the ATO) |
| {{ Tax\_PayableDate }} | FYI\_Tax\_PayableDate | Payable Date (the date the tax is payable) |
| {{ Tax\_PayableRefundable }} | FYI\_Tax\_PayableRefundable | Payable Refundable (the amount of the refund that is payable) |
| {{ Tax\_PayableRefundableVariance }} | FYI\_Tax\_PayableRefundableVariance | PayableRefundableVariance (the amount of the variance from estimate of the refund that is payable) |
| {{ Tax\_PeriodFrom }} | FYI\_Tax\_PeriodFrom | Period From (the from date of the period) |
| {{ Tax\_PeriodTo }} | FYI\_Tax\_PeriodTo | Period To (the to date of the period) |
| {{ Tax\_State }} | FYI\_Tax\_State | State (the state of the tax submission, that is, Draft, Filed, Completed) |
| {{ Tax\_Type }} | FYI\_Tax\_Type | Type |
| {{ Tax\_Amount }} | FYI\_Tax\_Amount | Amount |
| {{ Tax\_Year }} | FYI\_Tax\_Year | The most recent year listed in the Client – Tax tab. |

### Custom Fields

Spreadsheets also support Custom Fields, for example, {{ custom\_Client\_Level }}. Refer to the section Using Custom Fields to create Merge Fields on page 5.

## Job Templates

When Merge Fields are added to the Job Templates, they are added in a specific format using opening and closing curly brackets, with a space after the opening curly brackets and before the closing curly brackets e.g. {{ ClientName }}

**Note:** Creating Job Templates in FYI is available to users on the Elite plan only.

### Client Merge Fields

| **Client Merge Field** | **Description** |
| --- | --- |
| {{Addressee}} | Addressee (as held for the primary contact) |
| {{BankName}} | Financial Institution Name (Bank Name) |
| {{BankAccountName}} | Bank Account Name |
| {{BankAccountNumber}} | Account Number (number of client's bank account) |
| {{BankBSB}} | BSB Number (BSB of client's bank account) |
| {{BusinessNumber}} | ABN (Australian Business Number) |
| {{BusinessStructure}} | Business Structure (for example, Individual, Partnership) |
| {{ClientCode}} | Client Code |
| {{ClientName}} | Client Name - the name of the company (matches the Name merge field), and not the first/last name of the client. |
| {{ContactName}} | Contact Name (name of the primary contact) |
| {{CompanyNumber}} | ACN (Australian Company Number) |
| {{DateOfBirth}} | Client's Date of Birth |
| {{Email}} | Client’s Email |
| {{ExportCode}} | Export Code |
| {{Fax}} | Client's Fax |
| {{FirstName}} | Client’s First Name |
| {{LastName}} | Client’s Last Name |
| {{Manager}} | Manager (user who is the Manager responsible for the client) |
| {{ManagerEmail}} | Manager's Email |
| {{ManagerMobile}} | Manager's Phone |
| {{ManagerPhone}} | Manager's Phone |
| {{ManagerRole}} | Manager's Role (role of the Partner responsible for the client) |
| {{Mobile}} | Client’s Mobile |
| {{Name}} | Entity Name |
| {{OtherName}} | Client's Middle or Other Name |
| {{Partner}} | Partner Name (Partner responsible for the client) |
| {{PartnerEmail}} | Partner's Email |
| {{PartnerMobile}} | Partner's Mobile |
| {{PartnerPhone}} | Partner's Phone |
| {{PartnerRole}} | Partner's Role (role of the Partner responsible for the client) |
| {{Phone}} | Client’s Phone |
| {{PostalAddress}} | Postal Address (client's postal address) |
| {{PostalCity}} | Postal City |
| {{PostalCountry}} | Postal Country |
| {{PostalPostcode}} | Postal Postcode |
| {{PostalRegion}} | Postal Region |
| {{Salutation}} | Salutation (from primary contact) |
| {{StreetAddress}} | Physical Address (client's address) |
| {{StreetCity}} | Physical City |
| {{StreetCountry}} | Physical Country |
| {{StreetPostcode}} | Physical Postcode |
| {{StreetRegion}} | Physical Region |
| {{Title}} | Client's Title (Mr, Mrs, etc) |

### Custom Fields

Task Templates also support Custom Fields. Refer to the section Using Custom Fields to create Merge Fields on page 5.

## Task Templates

When Merge Fields are added to the Task Templates, they are added in a specific format, for example, {{ FirstName }} for the addressee's first name.

The Merge Fields need the correct bracket character for the opening and closing curly brackets, and a space after the opening curly brackets and before the closing curly brackets.

### Client Merge Fields

The following merge fields retrieve information that is held for the client in FYI synced from practice management software such as Xero Practice Manager and Greatsoft.

| **Client Merge Field** | **Description** |
| --- | --- |
| {{Addressee}} | Addressee (as held for the primary contact) |
| {{BankName}} | Financial Institution Name (Bank Name) |
| {{BankAccountName}} | Bank Account Name |
| {{BankAccountNumber}} | Account Number (number of client's bank account) |
| {{BankBSB}} | BSB Number (BSB of client's bank account) |
| {{BusinessNumber}} | ABN (Australian Business Number) |
| {{BusinessStructure}} | Business Structure (for example, Individual, Partnership) |
| {{ClientCode}} | Client Code |
| {{ClientName}} | Client Name - the name of the company (matches the Name merge field), and not the first/last name of the client. |
| {{ContactName}} | Contact Name (name of the primary contact) |
| {{CompanyNumber}} | ACN (Australian Company Number) |
| {{DateOfBirth}} | Client's Date of Birth |
| {{Email}} | Client’s Email |
| {{ExportCode}} | Export Code |
| {{Fax}} | Client's Fax |
| {{FirstName}} | Client’s First Name |
| {{LastName}} | Client’s Last Name |
| {{Manager}} | Manager (user who is the Manager responsible for the client) |
| {{ManagerEmail}} | Manager's Email |
| {{ManagerMobile}} | Manager's Phone |
| {{ManagerPhone}} | Manager's Phone |
| {{ManagerRole}} | Manager's Role (role of the Partner responsible for the client) |
| {{Mobile}} | Client’s Mobile |
| {{Name}} | Entity Name |
| {{OtherName}} | Client's Middle or Other Name |
| {{Partner}} | Partner Name (Partner responsible for the client) |
| {{PartnerEmail}} | Partner's Email |
| {{PartnerMobile}} | Partner's Mobile |
| {{PartnerPhone}} | Partner's Phone |
| {{PartnerRole}} | Partner's Role (role of the Partner responsible for the client) |
| {{Phone}} | Client’s Phone |
| {{PostalAddress}} | Postal Address (client's postal address) |
| {{PostalCity}} | Postal City |
| {{PostalCountry}} | Postal Country |
| {{PostalPostcode}} | Postal Postcode |
| {{PostalRegion}} | Postal Region |
| {{Salutation}} | Salutation (from primary contact) |
| {{StreetAddress}} | Physical Address (client's address) |
| {{StreetCity}} | Physical City |
| {{StreetCountry}} | Physical Country |
| {{StreetPostcode}} | Physical Postcode |
| {{StreetRegion}} | Physical Region |
| {{Title}} | Client's Title (Mr, Mrs, etc) |

### Job Fields

|  |  |
| --- | --- |
| **Merge Field** | **Description** |
| {{ JobName }} | The name of the Job associated with the process, for example, if using a Job Filter, the Job that triggered the process. |

### Custom Fields

Task Templates also support Custom Fields. Refer to the section Using Custom Fields to create Merge Fields on page 5.

## Automation Processes

An FYI Admin, or any user in a User Group that has permissions enabled for Automations, can set up automation processes using the Merge Fields listed below.

For detailed instructions, refer to the articles in the sections [Process Automation](https://support.fyidocs.com/hc/en-us/categories/360001507951).

**Note:** Merge Fields are not available for all automation steps. We recommend testing the Merge Field before finalising your Automation Process.

### Client Merge Fields

The following merge fields retrieve information that is held for the client in FYI synced from practice management software such as Xero Practice Manager and Greatsoft.

| **Client Merge Field** | **Description** |
| --- | --- |
| {{Addressee}} | Addressee (as held for the primary contact) |
| {{BankName}} | Financial Institution Name (Bank Name) |
| {{BankAccountName}} | Bank Account Name |
| {{BankAccountNumber}} | Account Number (number of client's bank account) |
| {{BankBSB}} | BSB Number (BSB of client's bank account) |
| {{BusinessNumber}} | ABN (Australian Business Number) |
| {{BusinessStructure}} | Business Structure (for example, Individual, Partnership) |
| {{ClientCode}} | Client Code |
| {{ClientName}} | Client Name - the name of the company (matches the Name merge field), and not the first/last name of the client. |
| {{ContactName}} | Contact Name (name of the primary contact) |
| {{CompanyNumber}} | ACN (Australian Company Number) |
| {{DateOfBirth}} | Client's Date of Birth |
| {{Email}} | Client’s Email |
| {{ExportCode}} | Export Code |
| {{Fax}} | Client's Fax |
| {{FirstName}} | Client’s First Name |
| {{LastName}} | Client’s Last Name |
| {{Manager}} | Manager (user who is the Manager responsible for the client) |
| {{ManagerEmail}} | Manager's Email |
| {{ManagerMobile}} | Manager's Phone |
| {{ManagerPhone}} | Manager's Phone |
| {{ManagerRole}} | Manager's Role (role of the Partner responsible for the client) |
| {{Mobile}} | Client’s Mobile |
| {{Name}} | Entity Name |
| {{OtherName}} | Client's Middle or Other Name |
| {{Partner}} | Partner Name (Partner responsible for the client) |
| {{PartnerEmail}} | Partner's Email |
| {{PartnerMobile}} | Partner's Mobile |
| {{PartnerPhone}} | Partner's Phone |
| {{PartnerRole}} | Partner's Role (role of the Partner responsible for the client) |
| {{Phone}} | Client’s Phone |
| {{PostalAddress}} | Postal Address (client's postal address) |
| {{PostalCity}} | Postal City |
| {{PostalCountry}} | Postal Country |
| {{PostalPostcode}} | Postal Postcode |
| {{PostalRegion}} | Postal Region |
| {{Salutation}} | Salutation (from primary contact) |
| {{StreetAddress}} | Physical Address (client's address) |
| {{StreetCity}} | Physical City |
| {{StreetCountry}} | Physical Country |
| {{StreetPostcode}} | Physical Postcode |
| {{StreetRegion}} | Physical Region |
| {{Title}} | Client's Title (Mr, Mrs, etc) |

### Document Fields

When Emails are created from a Template and signature that use certain merge fields, like the Author fields below, these are only applied when the final sender of the email has been determined. These are not displayed when editing the email in FYI.

The Author’s details are maintained in the Staff Profile within the practice management software and synchronised to FYI.

|  |  |
| --- | --- |
| **Merge Field** | **Description** |
| {{ AuthorName }} | The name of the Sender of the email. |
| {{ AuthorPhone }} | The phone number of the Sender of the email.  This field is synchronised from Xero Practice Manager, and not managed within FYI. |

|  |  |
| --- | --- |
| {{ AuthorMobile }} | The mobile number of the Sender of the email. This field is synchronised from Xero Practice Manager, and not managed within FYI. |
| {{ AuthorQualifications }} | The qualifications of the Sender of the email as managed in the user’s profile |
| {{ AuthorRole }} | The Sender of the email’s role in the practice. |

### Job Fields

|  |  |
| --- | --- |
| **Merge Field** | **Description** |
| {{ JobName }} | The name of the Job associated with the process, for example, if using a Job Filter, the Job that triggered the process. |

### Job Rollover Merge Fields

The "Create Job" process step can be used to create new jobs using the values from the Job that triggered the process. For example, when creating jobs at the end of the year.

For more information refer to the section "Create Job(s) using Values from the Trigger Job(s) - Copy from Trigger" in the article [Process Step Details - Updating Clients, Creating and Updating Jobs](https://support.fyidocs.com/hc/en-us/articles/8454267343129)

| **Job Rollover Merge Field** | **Description** |
| --- | --- |
| {{TriggerName}} | Used for the Name, this merge field automatically creates a Job with a name as per the name of the job used to trigger the automation |
| {{TriggerBudget}} | Enters a budget matching the job that triggered the automation |
| {{TriggerDescription}} | Used for the Description field, this enters a description matching the job that triggered the automation |
| {{Trigger(CustomField)}} | Use any Custom Fields with a type of "Text" as a merge field, as long as the field was populated from the original job that triggered the automation.  The merge field is entered using both the phrase "Trigger" and the Custom Field Name, without any spaces. For example, {{TriggerAdministration}}  A screenshot of a computer  Description automatically generated  Requirements:   * Ensure there is a space after the opening curly brackets and before the closing curly brackets. * Ensure you enter the Merge Field in the same case as the Custom Name * Remove any spaces. * Remove any characters that are not a number, letter or underscore (\_) |

### Invoice Fields

The Invoice Fields are only available when using the Custom Process – Create Invoice Automation step (available on the Elite plan only).

|  |  |
| --- | --- |
| **Merge Field** | **Description** |
| {{ TotalWIP }} | Calculate all current WIP associated with the job. |
| {{ TotalDisbursement }} | Aggregate total cost of all disbursements for the job (available for Billing and Standard Jobs only). |

### Custom Fields

Task Templates also support Custom Fields. Refer to the section Using Custom Fields to create Merge Fields on page 5.

### Collaborate Links

If using Collaborate in FYI to share documents and folders with your clients, you can insert merge fields on emails and documents.

These links will only be available if the recipient has been shared access to the document or folder, and securely logs into the Collaborate Site.

| **Merge Field** | **Description** |
| --- | --- |
| {{ AttachmentLinks }} | A link to the document on the Collaborate Site |
| {{ UploadFolderLink | web\_link }} | Link to the client’s Upload folder on the Collaborate site, for easily sending files to the practice |
| {{ CollaborateSiteLink | web\_link }} | Sends a link to the Collaborate site home page |

### Merge Fields available for specific steps

Some Merge Fields are only supported for specific Automation Steps.

| **Merge Field** | **Description** |
| --- | --- |
| {{ComplianceYear}} | Only available with BGL and NowInfinity Integrations. Refer to:   * [Connecting your BGL account to FYI](https://support.fyidocs.com/hc/en-us/articles/360032659872) * [Connecting your NowInfinity Account to FYI](https://support.fyidocs.com/hc/en-us/articles/360033065251) |
| {{OriginalFileName}} | Only available with the Alter Document step. Refer to [Process Step Details – Alter Document](https://support.fyidocs.com/hc/en-us/articles/12338455991705). |
|  |  |

### Custom Fields

Automations also support Custom Fields. Refer to the section Using Custom Fields to create Merge Fields on page 5.

## Advanced Merge Fields and Formatting

For more advanced merge fields, you can use filters to format the date, add text, or perform calculations. These can be used for Merge Fields entered directly into FYI for Email Templates, Template Details (including Word and Spreadsheets, but not within the files themselves), and Automations.

### Calculations and Date Formatting

When adding the filters, the pipe character ( | ) is added by typing the Shift + Backslash (\) key. Ensure that the spaces are added correctly as in the examples.

| **Date Merge Field** | **Description** |
| --- | --- |
| Current date  {{"now"}} | Returns the current time formatted to day month year e.g. 17 May 2023. |
| Format dates  {{"now" | date: "%d %B %Y"}} | Returns the current time formatted to day month year e.g. 17 May 2023. This can be added at the end of a Date merge field by using the pipe character and the date formatter.  Formatting options:   * "%d %b %y" - 31 Mar 23 * "%d %B %Y" - 31 March 2023 * "%d-%m-%Y" - 31-03-2023 (add a hyphen between the codes to hyphenate the date)   Use capitals for either the month or the year to display the full month text and year.  For example, to include the custom merge field "Job Start Date" from Xero Practice Manager, with the full month and year displayed, the following merge field would be added to the email template:  {{ custom\_Job\_Start\_Date | date: "%d %B %Y" }} |
| add\_interval  {{ "now" | add\_interval: "-1 month" | date: "%B %Y" }} | Calculates a new date by adding/subtracting a specified time period, referred to as an "Interval". This can be used for:   * Hour * Day * Month * Year   Replace "now" with your merge field e.g. DateOfBirth.  Requirements for using the interval   * The interval must be entered as either a minus or positive (a plus sign isn't necessary) e.g. -1, 2, 5 * Use the pipe character to separate the formatters * The Interval must come before the date format * Multiple intervals can be included in a single filter, for example: {{ "now" | add\_interval: "1 day" | add\_interval: "1 month" | date: "%d-%m-%Y" }} |
| start\_of  {{"now" | start\_of: "quarter" | date: "%d %B %y"}} | Change a date to the start of a specified period - month, quarter, or year. For example, if you had a job that was to be created at the start of each month.  Requirements for using start\_of:   * Use the pipe character to separate the formatters * Use the date formatters to specify the formatting of the returned date * The start\_of field must come before the date format |
| Constant Date  "2023-03-01" | Used to enter a specific date. This can be combined with the formatters above.  For example, entering {{"2023-05-18" | start\_of: "year" | date: "%d-%m-%y"}} would result in the date 01-01-23 (the first day of the year, formatted as d-m-y). |
| Multiplying values  {{ (field) | times: (value) }} | Takes the current value and multiplies it by the amount specified.  For example, take the budget value and multiply it by 1.03.  Can be combined with the round field to multiply and round to a whole number e.g. {{ Trigger\_custom\_Engagement\_Budget | times: 1.03 | round }} |
| Dividing values  {{ (field) | divided\_by: (value) }} | Used to divide one number by the value specified.  e.g. e.g. {{ Trigger\_custom\_Engagement\_Budget | divided\_by: 1.03 }}  Can be combined with "round" to divide and round to a whole number e.g. {{ Trigger\_custom\_Engagement\_Budget | divided\_by: 1.03 | round }} |
| Round  {{ (field) | round }} | Used to round to a whole number e.g. 2.7 would be rounded to 3, 1.2 would be rounded to 1. |

When used together, you could create an advanced Merge Field like:

* {{"now" | add\_interval: "1 month" | start\_of: "quarter" | date: "%d %B %y"}}

### URL encoding

Merge Fields can be combined to create URLs, however the merge fields would need to be encoded first. This ensures that any URL-unsafe characters are converted, removing the risk of the Merge Field breaking the URL.

| **Merge Field** | **Description** |
| --- | --- |
| {{ MergeField | url\_encode }} e.g.  {{ ClientName | url\_encode }} | Converts any URL-unsafe characters to the URL equivalent. E.g. “Cobb & Co” would become “Cobb+&26+Co”. |

### Microsoft Word Conditional Merge Fields

Word supports conditional merge fields.

**Note:** The following example shows a Custom Field with the prefix **custom\_**

For example, you can use a conditional merge field if you wanted to use a Custom Merge Field "Preferred\_Name" if this was available, or if these is not available use the Merge Field "Salutation".

| **Microsoft Word Conditional Merge Field** | **Description** |
| --- | --- |
| { IF { MERGEFIELD custom\_Preferred\_Name } = "" { MERGEFIELD Salutation }{ MERGEFIELD custom\_Preferred\_Name } \\* MERGEFORMAT}” } | If the Merge Field “Preferred Name” is available use that, but if not, use the Merge Field “Salutation”. |
| { IF { MERGEFIELD BusinessStructure \\* MERGEFORMAT } = “Individual” “{ MERGEFIELD Addressee \\* MERGEFORMAT }” “{ MERGEFIELD Addressee \\* MERGEFORMAT } { MERGEFIELD ClientName \\* MERGEFORMAT }” } | If the Business Structure is an individual then use the Addressee field.  For all other Business Structures, display the Addressee Field (Primary Contact’s details) and then the Client Name (Entity Name). |
| { IF { MERGEFIELD PostalAddress } = "" "{ MERGEFIELD StreetAddress }" "{ MERGEFIELD PostalAddress }" } | If the Postal Address is not populated then use the Street Address instead. |

**Note:** You need to right-click and use the Word function **Toggle Field Codes** to see the conditions. When Field codes are not enabled, the example above would show as Dear «custom\_Preferred\_Name»

### Microsoft Word CreatedDate Merge Field Formatting

You can add a switch to the Merge Field to format the date. This allows you to set it to display, for example, as 5 Feb 2021, as 5 February 2021, Friday, 5 February 2021, etc.

1. Edit the Word Template or Stationery using the desktop version of Word.
2. Right-click over the **CreatedDate** merge field.
3. From the Word pop-up menu, select **Toggle Field Codes**.  
   The Merge Fields displays as a code in your Word document and shows as follows:  
   {MERGEFIELD CreatedDate }  
   or as  
   {MERGEFIELD CreatedDate \\* MERGEFORMAT}
4. Add the formatting switch using the examples below.  
   Ensure there is a space after the word CreatedDate, after the opening bracket { and before the closing bracket }.  
   If \\* MERGEFORMAT is shown, the switch should replace this.

| **Merge Field Code** | **Displayed result (for a date 5th February 2021)** |
| --- | --- |
| { MERGEFIELD CreatedDate \@ “dddd, d MMMM yyyy” } | Friday, 5 February 2021 |
| { MERGEFIELD CreatedDate \@ “ddd, d MMMM yyyy” } | Fri, 5 February 2021 |
| { MERGEFIELD CreatedDate \@ “d MMM yyyy” } | 5 Feb 21 |
| { MERGEFIELD CreatedDate \@ “MMM d yyyy” } | Feb 5 21 |
| { MERGEFIELD CreatedDate \@ “dd/MM/yy” } | 05/02/21 |

### Email Template Merge Field Formatting

You can format numerical email merge fields, for example for currency amounts, so the result includes commas and brackets for negative amounts. Refer also to **Formatting** at the bottom of the Email Editor Groups in [Including Merge Fields in Email Templates and Signatures](https://support.fyidocs.com/hc/en-us/articles/360052395852).

The following formatting codes can be added when the Merge Field is added to the Email template. The example shows the formatting result on a number -1000123.00

| **Merge Field Formatting** | **Displayed result for the value -1000123.00** |
| --- | --- |
| {{ "Merge Field" | comma\_group }} | -1,000,123.00 |
| {{ "Merge Field" | dot\_group }} | -1.000.123,00 |
| {{ "Merge Field" | blank\_group }} | -1 000 123.00 |
| {{ "Merge Field" | negative\_parens }} | (1000123.00) |
| {{ "Merge Field" | negative\_squares }} | [1000123.00] |

Filters can be chained, but the grouping filter needs to go before the negative filter in the list, for example:

**{{ "Merge Field" | comma\_group | negative\_parens }}** to format as (1,000,123.00)

When adding the formatters, the pipe character ( | ) is added by typing the **Shift + Backslash (\)** key. Ensure that the spaces are added correctly as in the examples.

For example, to display the results of the Merge field for the Tax Payable/Tax Refundable amount with a dollar sign at the start and a comma for the thousands, add this as follows:

${{ Tax\_PayableRefundable | comma\_group }}