Personal Information

Category	Field	Merge Field	Usage	Example
Contact	First Name	{{contact.first_name}}	Student's First Name	Jordan
Contact	Last Name	{{contact.last_name}}	Student's Last Name	Miller
Recipient	First Name	{{recipient.first_name}}	First Name of the person receiving the email/etc. (most often the parent)	Shelly
Recipient	Last Name	{{recipient.last_name}}	Last Name of the person receiving the email/etc. (most often the parent)	Miller
Contact	Grade	{{contact.grade}}	Grade to which student is applying or enrolling	9th
Contact	Contact Active School Year	{{contact.active_school_year}}	School year (term) in which student is applying or enrolling.	2022-2023
Contact	Birth Date	{{contact.birth_date}}	Student's Birth Date	11/28/2007
Contact	Gender	{{contact.gender}}	Student's Gender (displayed as M/F/O)	M
Contact	Gender Based Pronoun: He/She/They	{{contact.he_she_they}}	Displays the text **he, she,** or **they** based on the gender on the contact record	he
Contact	Gender Based Pronoun: His/Her/Their	{{contact.his_her_their}}	Displays the text **his, her,** or **their** based on the gender on the contact record	his
Contact	Gender Based Pronoun: Him/Her/Them	{{contact.him_her_them}}	Displays the text **him, her,** or **them** based on the gender on the contact record	him

Contact	Gender Based Pronoun: Son/Daughter/Child	{{contact.son_daughter_child}}	Displays the text son, daughter, or child based on the gender on the contact record	son

Current & Entry Age Formats

Entry Age is calculated using the School Entry Date set within Settings -> General -> Basic Setup and the student's birthdate.

Category	Field	Merge Field	Usage	Example
Contact	Entry Age Year	{{contact.entry_age_year}}	Student's entry age in years	4
Contact	Entry Age Month	{{contact.entry_age_month}}	Student's entry age in months	48
Contact	Entry Age Year Month	{{contact.entry_age_year_month}}	Student's entry age in years and months	4 years, 6 months
Contact	Entry Age Year Month Decimal	{{contact.entry_age_year_month_decimal}}	Student's entry age in year and month decimal format	4.5 (for 4 years, 6 months)
Contact	Entry Age Year Month Day	{{contact.entry_age_year_month_day}}	Student's entry age in years, months, and days	4 years, 6 months, 10 days

Current Age merge fields are dynamic so they will update based on the current date and the student's birthdate.

Category	Field	Merge Fields	Usage	Example
Contact	Age Year	{{contact.age_year}}	Student's current age in years	4
Contact	Age Month	{{contact.age_month}}	Student's current age in months	48
Contact	Age Year Month	{{contact.age_year_month}}	Student's current age in years and months months	
Contact	Age Year Month Decimal	{{contact.age_year_month_decimal}}	Student's current age in year and month decimal format	4.5 (for 4 years, 6 months)

Contact	Age Year Month Day	{{contact.age_year_month_day}}	Student's current age in years, months, and days	4 years, 6 months, 10 days

Parent Salutations

Category	Field	Merge Field	Usage	Example
Recipient	Salutation Parent First Names	{{recipient.salutation_parent_first_names}}	Parent First Names	Mitchell and Shelly
Recipient	Salutation Preferred Names	{{recipient.salutation_preferred_names}}	Parent Preferred Names (if no preferred name, pulls first name)	Mitch and Shelly
Recipient	Salutation First and Last Names	{{recipient.salutation_first_and_last_names}}	Parent First and Last Names	Mitchell and Shelly Miller
Recipient	Salutation Pref and Last Names	{{recipient.salutation_pref_and_last_names}}	Parent Preferred and Last Names (if no preferred name, pulls first name)	Mitch and Shelly Miller
Recipient	Salutation Title and Last Names	{{recipient.salutation_title_and_last_names}}	Parent Titles and Last Names	Mr. and Ms. Miller
Recipient	Salutation Title First and Last Names	{{recipient.salutation_title_first_and_last_names}}	Parent Titles, First and Last Names	Mr. and Ms. Mitch Miller
Recipient	Salutation Title First Last and Suffix	{{recipient.salutation_title_first_last_and_suffix}}	Parent Titles, First and Last Names, and Suffixes	Mr. and Ms. Mitch Miller Sr
Recipient	Salutation Title First Last Middle and Suffix	{{recipient.salutation_title_first_last_middle_and_suffix}}	Parent Titles, First Names, Middle Initials, Last Names, and Suffixes	Mr. and Ms. Mitch J. Miller Sr

Recipient	Salutation Reverse Parent First Names	{{recipient.salutation_reverse_parent_first_names}}	Parent First Names, in reverse order	Shelly and Mitchell
Recipient	Salutation Reverse Preferred Names	{{recipient.salutation_reverse_preferred_names}}	Parent Preferred Names, in reverse order (if no preferred name, pulls first name)	Shelly and Mitch
Recipient	Salutation Reverse First and Last Names	{{recipient.salutation_reverse_first_and_last_names}}	Parent First and Last Names, in reverse order	Shelly and Mitchell Miller
Recipient	Salutation Reverse Pref and Last Names	{{recipient.salutation_reverse_pref_and_last_names}}	Parent Preferred and Last Names, in reverse order	Shelly and Mitch Miller

Date Formats

Category	Field	Merge Field	Usage	Example
System	Current Date Long	{{system.current_date_long}}	The date in full "Month Day, Year" format	October 10, 2021
System	Current Date Short	{{system.current_date_short}}	The date in abbreviated "Month Day" format	Oct 10
System	Current Date Numerical	{{system.current_date_numerical}}	The date in MM/DD/YYYY format	10/10/2021

Direct Link to Forms

Category	Field	Merge Field	Usage	Example

| Contact | Link to Form [Online Form Name] Example: Link to Form Student Essay | This will vary based on your site and the name of the form you select. {{contact.link_to_form_student_essay}} | Generates a unique link that redirects the parent directly to an online form on their student's Admissions or Enrollment checklist. | https://demo.schooladminonline.com/forms/admissions/student_essay/82847792-14f4-11e9-86f2-bc764e10a9f7 |

Checklist Information

Category	Field	Merge Field	Usage	Example
Contact	Checklist Application	{{contact.checklist_application}}	Shows **all required items** on the student's **Admissions** checklist, both complete and incomplete	☑ Application Form ❑ Interview
Contact	Checklist Application Incomplete	{{contact.checklist_application_incomplete}}	Shows **all required items that are *incomplete*** on the student's **Admissions** checklist	❑ Interview ❑ Test Scores
Contact	Checklist Enrollment	{{contact.checklist_enrollment}}	Shows **all required items** on the student's **Enrollment** checklist, both complete and incomplete	☑ Contract ☑ Deposit
Contact	Checklist Application Incomplete	{{contact.checklist_enrollment_incomplete}}	Shows **all required items that are *incomplete*** on the student's **Enrollment** checklist	❑ Emergency Form❑ Welcome Event

Contact	[Checklist Item Name] Date **Example:** Application Form Date	This will vary based on your site and the **school year (term)** of the checklist item you select. **Example:** {{contact.checklist_id_year_8ce092ab-14f4-11e 9-86f2-bc764e10a9f7_2021_date}}	Shows the completion date of a given checklist item in the selected term Use the Merge Field Picker within the template editor to easily pull in these merge fields	11/10/2021
Contact	(The name depends on how the application is named in your site.) **Example:** Checklist Application Fee Date	This will vary based on your site and the canonical name of the checklist item you select. **Example:** {{contact.checklist_application_fee_date}}	Shows the completion date of a given checklist item in the student's current term Checklist canonical names can be found on the checklist setup pages	11/10/2021

Authentication & Parent Portal

Category	Field	Merge Field	Usage	Example
Recipient	Verification Link	{{recipient.verification_link}}	Pulls in the unique authentication **link** for the recipient, so that they can click to link their Parent Portal Account to the associated student	http://demo.school adminonline.com/ portal/authenticate/b cd7y1y1
Recipient	Authentication Code	{{recipient.authentication_code}}	Pulls in the unique authentication **code** for the recipient, so they can copy and paste it into the Parent Portal to link their Parent Portal Account to the associated student	cd7y1y1

Recipient	Portal Email	{{recipient.portal_email}}	Pulls in the **authenticated portal email** for therecipient, if one exists	shelly.miller@schooladmin.com
Contact	Parent 1 Name	{{contact.parent1.name}}	Pulls in the name of the person listed as **Parent 1** for the selected contact This is useful if you want to email consultants, but include the parent's name and authentication code	Shelly Miller
Contact	Parent 2	{{contact.parent2.name}}	Pulls in the name of the person listed as **Parent 2** for the selected contact This is useful if you want to email consultants, but include the parent's name	Mitchell Miller
Contact	Parent 1 Authentication Code	{{contact.parent1.authentication_code}}	Pulls in the authentication code for the person listed as **Parent 1** for the selected contact This is useful if you want to email consultants, but include the parent's authentication code	cd7y1y1
Contact	Parent 2 Authentication Code	{{contact.parent2.authentication_code}}	Pulls in the authentication code for the person listed as **Parent 2** for the selected contact This is useful if you want to email consultants, but include the parent's authentication code	2cf4f010

Contract Information

Note: <mark>Contract must be generated for a student before these merge fields will work.</mark> The tokens will not work the same if the contract has not yet been generated or is already submitted.

Category	Field	Merge Field	Usage	Example
Contact	Tuition (minus aid and fees)	{{contact.tuition|format_currency}}	The base tuition amount **not** including and aid or fees.	$14,000.00
Contact	Net Tuition	{{contact.net_tuition}}	The tuition amount including custom discounts/scholarships but NOT financial_aid_amount and scholarship_amount.*	$11,000.00
Contact	Net Tuition With Aid	{{contact.net_tuition_with_aid}}	The tuition amount **after** financial aid/ scholarships (including financial_aid_amount and scholarship_amount)*	$7,500.00
Contact	Deposit Amount Paid	{{contact.deposit_amount_paid}}	The deposit amount that was paid with the contract Will only populate data **after** the contract has been submitted with a deposit, **OR** the deposit checklist item is manually checked	1000.00
Contact	Deposit Payment Method	{{contact.deposit_payment_method}}	Payment method used to pay the deposit	Check
Contact	Signer 1 Payment Plan	{{contact.contract_signer1_payment_plan}}	Payment plan selected by the primary contract signer	6_payment_plan

Contact	Signer 2 Payment Plan	{{contact.contract_signer2_payment_plan}}	Payment plan selected by the seconda signer (for dual signature contracts)	10_payment_plan
Contact	Contract Submit Date	{{contact.contract_submit_date}}	Date the contract was submitted electronically, in MM/DD/YYYY or DD/MM/YYYY format (depending on locale setting)	02/12/2022
Contact	Financial Aid Amount	{{contact.financial_aid_amount}}	Displays the amount in the term-based field Financial Aid Amount (financial_aid_amount)	1000.00
Contact	Scholarship Amount	{{contact.scholarship_amount}}	Displays the amount in the term-based field Scholarship Amount (scholarship_amount)	2500.00

*These merge fields capture the amount at the time the contract is generated. If changes are made to tuition or aid amounts after generating the contract, it will need to be re-generated for this merge field to update accordingly.

School Information

Category	Field	Merge Field	Usage	Example
School	Name	{{school.name}}	Short name of the school as defined on Settings -> General -> Basic Setup	SchoolAdmin
School	Long Name	{{school.long_name}}	Long name of the school as defined on Settings -> General -> Basic Setup	SchoolAdmin Academy
School	Portal Name	{{school.portal_name}}	Portal name as defined on Settings -> General -> Basic Setup	Admissions & Enrollment Portal
School	Parent Portal URL	{{school.parent_portal_url}}	Direct link to your Parent Portal login page	https://demo.schoo ladminonline.com/portal

School	Admissions Contact Name*	{{school.admissions_contact_name}}	Name of the Admissions contact as defined within Settings -> General -> Contact Information	Courtney Single
School	Admissions Contact Title*	{{school.admissions_contact_title}}	Title for the Admissions contact as defined within Settings -> General -> Contact Information	Director of Admissions
School	Admissions Email*	{{school.admissions_email}}	Email for the Admissions contact as defined within Settings -> General -> Contact Information	admissions @schooladm in.com
School	Admissions Phone*	{{school.admissions_phone}}	Phone for the Admissions contact as defined within Settings -> General -> Contact Information	555-555-5555

*Note: These same tokens exist for the Enrollment and System Administrator contacts within Settings -> General -> Contact Information. Simply replace 'Admissions' with 'Enrollment' or 'Sysadmin' in the merge field text (e.g. *school.enrollment_email* or *school.sysadmin_phone*).

Appointment & Calendar Information

Note: These merge fields are ONLY available in the appointment confirmation, reminder, and cancellation email templates on calendars.

Category	Field	Merge Field	Usage	Example
Appointment	Date	{{appointment.date}}	Populates the date of the scheduled appointment slot	Wed, Oct 20th, 2021
Appointment	Start Time	{{appointment.start_time}}	Populates the start time of the scheduled appointment slot	1:00 PM
Appointment	End Time	{{appointment.end_time}}	Populates the end time of the scheduled appointment slot	2:00 PM
Appointment	First Name	{{appointment.first_name}}	Populates the first name of the contact for the scheduled appointment slot	Shelly

Appointment	Last Name	{{appointment.last_name}}	Populates the last name of the contact for the scheduled appointment slot	Miller
Appointment	Video Conferencing Link	{{appointment.video_conferencing_link}}	Populates the video conferencing link for the scheduled appointment slot's associated user schedule, if one is set	https://finalsite.zoom.us/j/92059232 387
Appointment	Custom ScheduleText	{{appointment.custom_schedule_text}}	Populates the custom schedule text for the scheduled appointment slot's associated user schedule, if it is set	This meeting will take place via Zoom.
Calendar	Title	{{calendar.title}}	Populates the title of the calendar you're viewing. This merge field can only be used within appointment email templates	Parent Interview

To pull in the date and time a student is scheduled for a calendar event **outside** of the appointment emails, use the following:

Category	Field	Merge Field	Usage	Example
Contact	[Calendar Event Name] Date **Example:** Campus Tour Date	This will vary based on your site and the **canonical name** of the calendar you select. **Example:** {{contact.calendar_tour_date}}	Shows the date and time the student is scheduled for a given calendar. **Please note:** This merge field displays information in two lines. Calendar canonical names can be found in the Calendar Settings.	Wed, Oct 20th, 2020 12:00PM - 1:00PM

Recommendations

Note: These fields are ONLY available within the recommendation email templates found in Parent Portal Content.

Category	Field	Merge Field	Usage	Example
Recommend	Sender Name	{{recommend.sender_name}}	Name associated with the Parent Portal Account that sent the recommendation. This is most often the parent.	Shelly Miller
Recommend	Sender Email	{{recommend.sender_email}}	Email associated with the Parent Portal Account that sent the recommendation. This is most often the parent.	shelly.miller@schooladmin.com
Recommend	Name	{{recommend.name}}	Name of the teacher/ recipient of the request. You can also pull their first name only using {{recommend.first_name}} or second name only using {{recommend.last_name}}	Sarah Smith
Recommend	Recommendation Link	{{recommend.recommendation_link}}	Populates the link to complete the online recommendation form. The teacher/ recipient will click this to start filling out the form.	http://demo.school adminonline.com/r ecommendations/ 1d1xcxhv6ryfmht m03y0qou3qb4ov
Recommend	Decline Link	{{recommend.decline_link}}	Populates the link to decline to complete the recommendation. This link redirects to a	http://demo.school adminonline.com/r ecommendations/ 1d1xcxhv6ryfmht m03y0qou3qb4ov/ decline

			page where the teacher/ recipient can select a reason for declining the recommendation.	
Recommend	Checklist Item Name	{{recommend.checklist_item_name}}	Name of the associated online recommendation checklist item.	English Teacher Recommendation

Online Reading & Review

Category	Field	Merge Field	Usage	Example
Contact	Assigned Readers	{{contact.review_readers}}	Displays the list of readers assigned to the student, comma-separated	Sally Reader, Steve Reader
Contact	Reading Progress	{{contact.review_reading_status}}	Displays the text 'complete' or 'incomplete' depending on if the student has been reviewed by all assigned readers or not	incomplete
Contact	Reader Comments	{{contact.review_comments}}	Displays the comments that each reader has written for each of the checklist items in review	**Review comments for Sally Reader**: Application Form: Looks great! Strong candidate.

Contact	Review Overall Score	{{contact.review_overall_score}}	Displays the combined review percentage score for the student	87.50%
Contact	Review Score for [Rating Category Name] This will vary based on your site and the name of the rating category you select. **Example:** Review Score for Academics	{{contact.review_academics_score}}	Displays the student's review score on a specific rating category, formatted as a number with two decimal places	4.5