Graphical user interface, application

Description automatically generated

An FYI Administrator or any user in a User Group that has Administer Templates enabled, can set up stationery and templates for emails and documents using the Merge Fields listed below. The source data is imported from Xero Practice Manager or from FYI.

For detailed instructions, refer to [***Templates and Stationery***](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 Data from Xero Practice Manager**

The following Merge Fields retrieve information that is held for the client in Xero Practice Manager. This information is displayed in FYI in the Clients - Summary tab, or in your Xero Practice Manager.

| **Merge Field** | **Description** |
| --- | --- |
| «Name» | Company Name |
| «ClientName» | Client Name |
| «Addressee» | Addressee (as held for the primary contact) |
| «Salutation» | Salutation (as held for the primary contact and which can also hold the name) |
| «FirstName» | Client’s First Name |
| «LastName» | Client’s Last Name |
| «OtherName» | Client's Middle or Other Name |
| «Title» | Client's Title (Mr, Mrs, etc) |
| «ContactName» | Contact Name (name of the primary contact) |
| «Email» | Client’s Email |
| «Phone» | Client’s Phone |
| «Mobile» | Client’s Mobile |
| «Fax» | Client's Fax |
| «DateOfBirth» | Client's Date of Birth |
| «BusinessNumber» | ABN (Australian Business Number) |
| «BusinessStructure» | Business Structure (for example, Individual, Partnership) |
| «CompanyNumber» | ACN (Australian Company Number) |
| «StreetAddress» | Physical Address (client's address) |
| «StreetCity» | Physical City |
| «StreetRegion» | Physical Region |
| «StreetCountry» | Physical Country |
| «StreetPostcode» | Physical Postcode |
| «PostalAddress» | Postal Address (client's postal address) |
| «PostalCity» | Postal City |
| «PostalRegion» | Postal Region |
| «PostalCountry» | Postal Country |
| «PostalPostcode» | Postal Postcode |
| «ClientCode» | Client Code |
| «BankBSB» | BSB Number (BSB of client's bank account) |
| «BankAccountNumber» | Account Number (number of client's bank account) |
| «BankAccountName» | Bank Account Name |
| «BankName» | Financial Institution Name (Bank Name) |
| «ExportCode» | Export Code |

**User Data from Xero Practice Manager**

The following Merge Fields retrieve information about the person who created the document in FYI, or the owner of the document in FYI, or the Partner or Manager responsible for the client.

| **Merge Field** | **Description** |
| --- | --- |
| «AuthorName» | Author Name (user who created the document) |
| «AuthorEmail» | Author Email |
| «AuthorPhone» | Author Phone |
| «AuthorMobile» | Author Mobile |
| «OwnerName» | Owner Name (user who is the Owner of the document) |
| «OwnerEmail» | Owner Email |
| «OwnerPhone» | Owner Phone |
| «OwnerMobile» | Owner Mobile |
| «Partner» | Partner Name (user who is the Partner responsible for the client) |
| «PartnerEmail» | Partner's Email |
| «PartnerPhone» | Partner's Phone |
| «PartnerMobile» | Partner's Mobile |
| «Manager» | Manager (user who is the Manager responsible for the client) |
| «ManagerEmail» | Manager's Email |
| «ManagerPhone» | Manager's Phone |
| «ManagerMobile» | Manager's Phone |

**Data from FYI**

The following Merge Fields retrieve information from FYI.

| **Merge Field** | **Description** |
| --- | --- |
| «AuthorRole» | Author Role (from the author's FYI User Profile) |
| «AuthorQualifications» | Author Qualifications |
| «OwnerRole» | Owner Role (from the owner's FYI User Profile) |
| «OwnerQualifications» | Owner Qualifications |
| «ReferenceNumber» | Reference Number - from the FYI document |
| «PartnerRole» | Partner's Role (role of the Partner responsible for the client) |
| «ManagerRole» | Manager's Role (role of the Partner responsible for the client) |
| «CreatedDate» | Created Date (date on which a document was created) |
| «ShareFolderLink» | Share Folder Link (link to the OneDrive shared folder from Client - Collaborate) |
| «UploadFolderLink» | Update Folder Link (link to the OneDrive shares Uploads folder from Client - Collaborate) |

**Digital Signing (Annature and FuseSign)**

When sending documents for signature via Annature or FuseSign, you need to ensure the document you send has the **Signature** Merge Field included in the document. Refer to [***Digital Signatures using Annature***](https://support.fyidocs.com/hc/en-us/articles/360048419391-Digital-Signatures-using-Annature) and [***Digital Signatures using FuseSign***](https://support.fyidocs.com/hc/en-us/articles/360054510951-Digital-Signatures-using-FuseSign).

The **Signature** Merge Field is automatically detected as a placeholder where the recipient has to 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).

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

**Tax Information from Xero Tax**

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

**Important Note  
These fields can only be used in the FYI pre-figured processes for Tax Assessments as these processes are triggered by tax returns. If these Tax Merge Fields are used in any other processes (such as Custom Processes) the source of these will not be known and the Merge Fields will not retrieve any data.**

| **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» | Year |

**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 |
| AS | Activity Statement | 2018 |
| 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»

| **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 |

**Date of document 19 February 2021**