e123 Resource Guide

Email / Viewable PDF/ SMS Setup

Version: e123_Documentation_Email/SMS_Setup_v1_20230427

Table of Contents

Version: e123_Documentation_Email/SMS_Setup_v1_20230427

Overview

A useful tool in the e123 platform is the ability to build communications that you can either view and print, email, or send via text messaging. These communications can be built and customized to reflect your company's or organization's predetermined marketing specs and requirements.

All sorts of communications can be built such as emails for enrollment confirmations, payment related information, plan updates, marketing campaigns, and much more.

Objective

The objective of this guide is to provide you with the instructions necessary to create these communications in the platform.

You will be provided with navigation and building rules so that you can feel comfortable about your abilities and confident that your information will be properly received.

Available Communications

The e123 system has several communication channels available that utilize a Template outline and Dynamic Data to make repetitive communications simple.

<u>It works like this:</u>

1. Create a Template
    - HTML, Plain Text or SMS Content styles, and then use dynamic codes as place holders where you want to place information that will change based on the recipient.

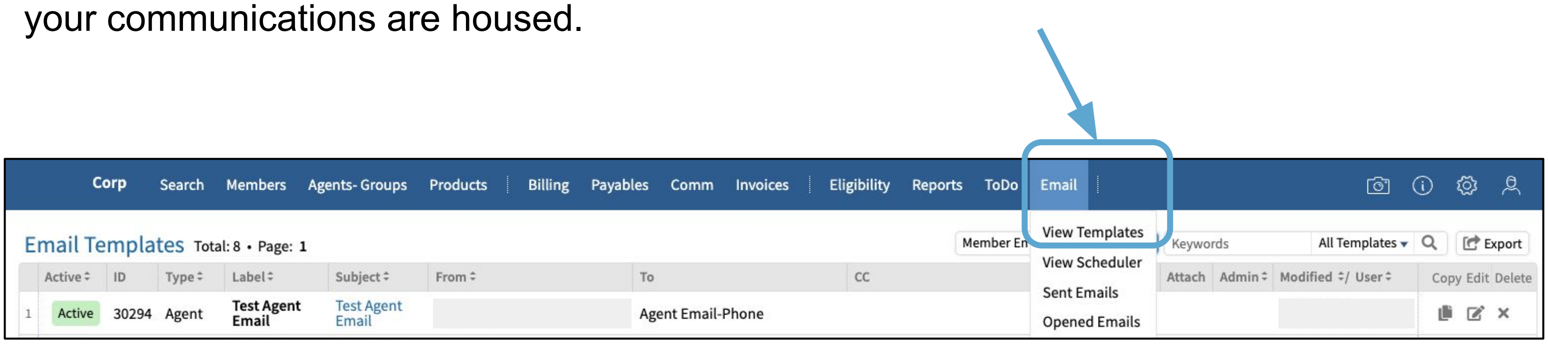
2. Select the Template

3. Select the Action
    - View, Print, Send, Customize

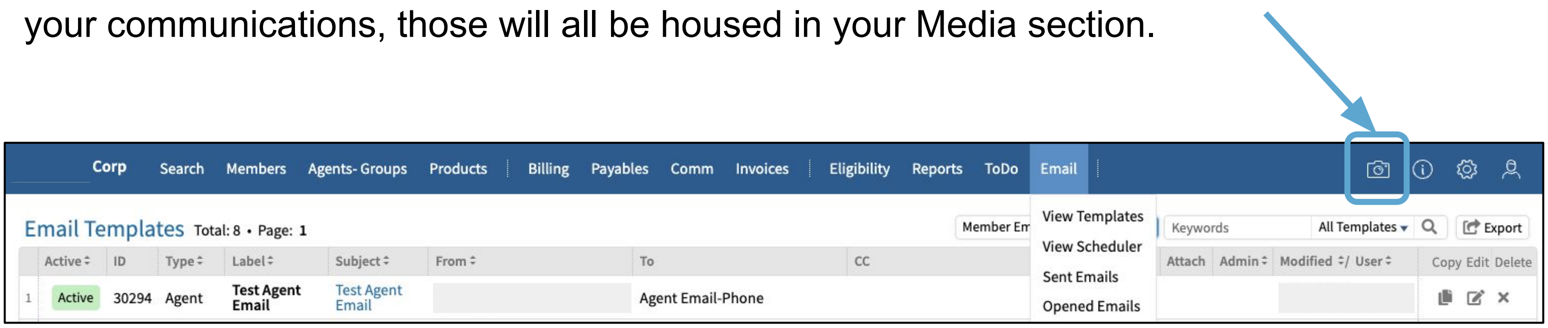
We'll explain how to access and use the templates in more detail after we've gone through the Template creation process.

Where to Access Your Communications

To access the Template List, navigate to the Letters/Email Tab on the top Navigation bar, and select View Templates from the Drop-Down Menu presented. This will be where all of your communications are housed.



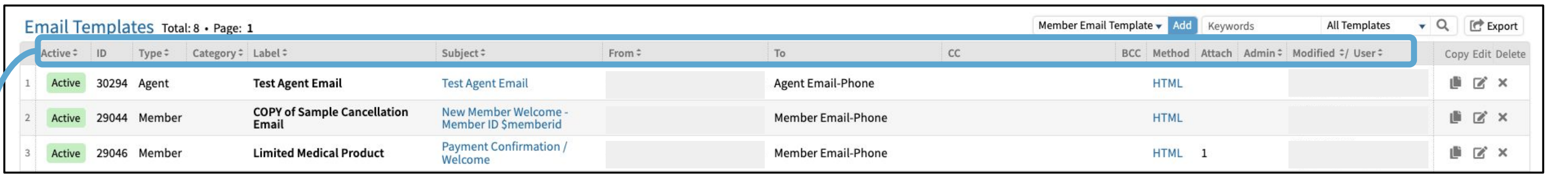
If your organization will be using logos, pictures, and documents (such as brochures) in your communications, those will all be housed in your Media section.



You will learn later in this training how to add and link images to your communications.

Navigating the Template List

This is the Template List. You can view all the templates housed in your back office. The templates can be set up for Members/Customers or Agents/Marketers/Groups.



Email Templates Total: 8 • Page: 1

Member Email Template Add Keywords All Templates Export

	Active	ID	Type	Category	Label	Subject	From	To	CC	BCC	Method	Attach	Admin	Modified / User	Copy	Edit	Delete
1	Active	30294	Agent		Test Agent Email	Test Agent Email		Agent Email-Phone			HTML						
2	Active	29044	Member		COPY of Sample Cancellation Email	New Member Welcome - Member ID $memberid		Member Email-Phone			HTML						
3	Active	29046	Member		Limited Medical Product	Payment Confirmation / Welcome		Member Email-Phone			HTML	1					

Active Status
Is the template activated for use? If it is inactive, it will not appear in the Letters Lists as an option for sending.

Template ID
Used to keep schedulers linked to templates if the Label changes.

Type
Identifies the information that is accessible through the templates' dynamic data fields - can be Agent or Member Type.

Category
A user created label that can be applied to templates for grouping, sorting, or filtering purposes, ie. Welcome, Reminder, Notice.

Label
Internal name of a template used to differentiate from others.

Subject
This is what displays as the email subject line when sent externally.

From
The address where the email will originate from, and replies will be sent back to.

To, CC, BCC
Where is the Letter going?

Method
What media channel will the communication be sent on?

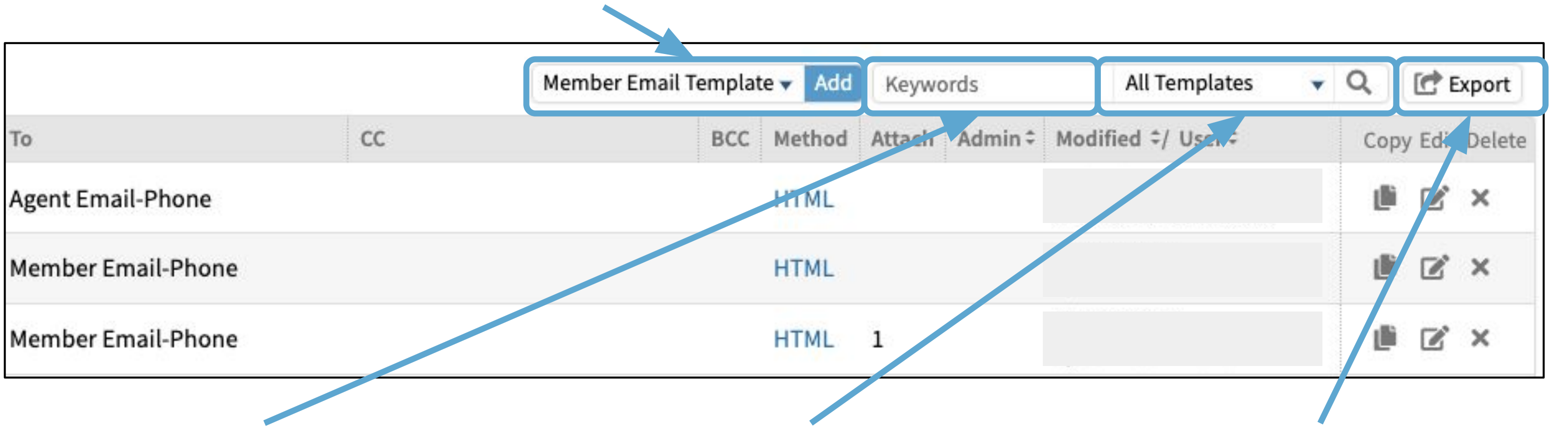
Attachments
Are files included to be sent with the correspondence? This will display how many.

Admin Only
Is the Template for Administrator use only?

Modified / User
Displays the last date the template was edited and saved and which User made the change.

Create, Delete, Edit, and Search Your Communications

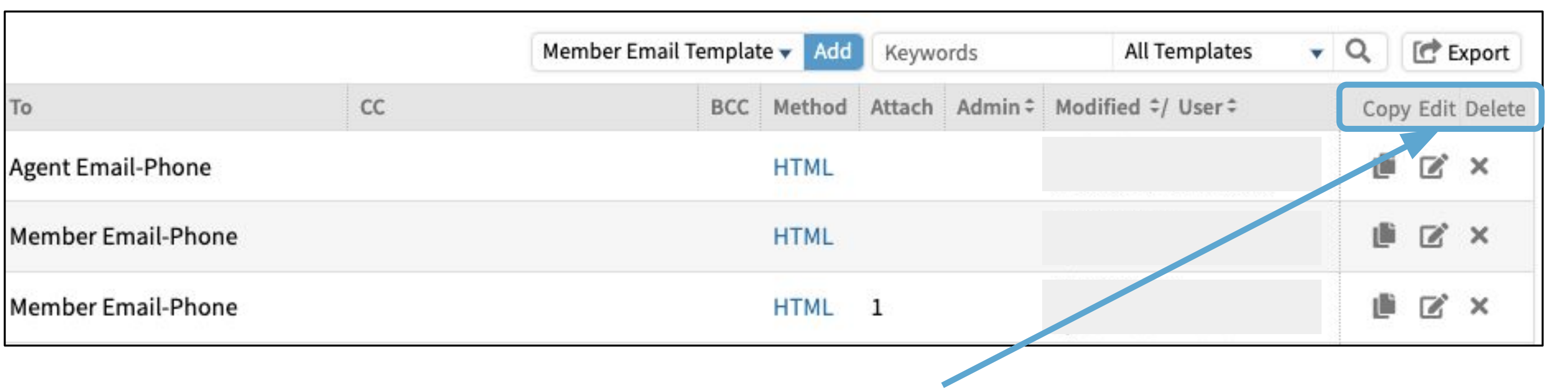
To Make a new template, select a Template in the Selection Box, and click Add.



Keyword Search
Type in a word from the subject or label of an email to have the template quickly pull up.

Template Filter
If you have created and applied categories for your letter templates, this drop down will allow you to quickly filter templates by category.

Export
Export a list of the communications for things such as version tracking or a compliance list to a carrier.



Copy
Duplicates the template, creating a new Template ID, but preserving content and attachments.

Edit
Takes you into the Template to make changes

Delete
Deletes the Template. This will affect schedulers and could affect the history communications.

How to Create a New Template

1. From the Template View List: Select the Template Type from the drop down.
2. Click Add.
3. Enter a Label.
4. Enter a Subject.
5. Enter a From address.
6. Enter a To address, or select To Users.
7. Limit to Products if needed.
8. Add necessary Attachments.
9. Select the corresponding Radial to set the method of sending.
10. Enter the content / correspondence data.
11. Press the Save information button in the bottom left of the page.

The following guide will show you how to do complete each of the above steps so that your organization's communications contain the data and information they require.

Learning the Sections of the Template Page

It is important to understand the different functionalities that are available when building your communications.

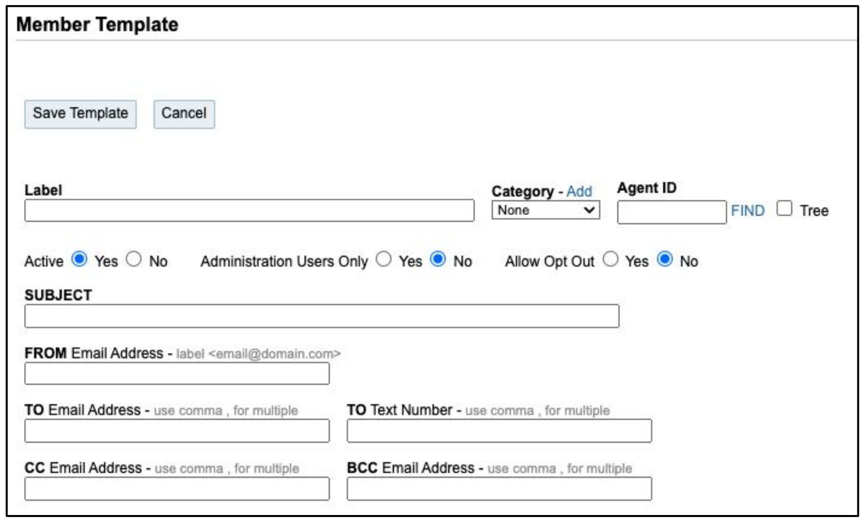
As a client, you are able to personalize each of them based upon your organization's requirements.

Understanding how to build your communications' templates will help you successfully print, view, and send notifications directly through your back office.

We'll now be going over the sections, uses, and Types of Content that can be created and how to set them up.

Setting up Your Labeling and Recipients

Determine your organization's naming convention and confirm the sender and recipients to begin setting up your communication.



Label
This is the Admin Label for the template and is only shown in the back office. This is what displays in the Templates List from a Member's Page.

Category
This is where a Custom Category can be applied to the Template.

Agent ID
If you need to limit the Template View and Sending capabilities to a single agent or tree, this is where you would configure that setting.

Active Status
This is where you set the use status of the Template.

Administrator Status
Selecting Yes means only users given Administrator permissions can view and use the Template

Allow Opt Out Status
If the Opt Out on the Member Detail page is set to Yes, then the Member is set to not receive any emails where the email template is set to Allow Opt Out. Only Templates Marked as Opt Out will be stopped.

Subject
Identifies the Topic of the Email for the recipients in their inbox.

From
The Address of the Sender. Replies will be sent to this address.

To
If your email needs to be sent to the same person every time, put the email address here.

CC
If you want to Carbon Copy someone every time the email is sent, put the address here.

BCC
To Blind Carbon Copy an address when the email is sent, place the address here.

Setting up Your Labeling and Recipients - continued

Determine which profiles in the back office you want the communication sent to.

TO Users	CC Users	BCC Users
☑ Member Email-Phone	☐ Member Email-Phone	☐ Member Email-Phone
☐ Member Alternate Email-Phone	☐ Member Alternate Email-Phone	☐ Member Alternate Email-Phone
☐ Agent for Member	☐ Agent for Member	☐ Agent for Member
☐ Agent Parent Email-Phone	☐ Agent Parent Email-Phone	☐ Agent Parent Email-Phone
☐ Agent Top Level	☐ Agent Top Level	☐ Agent Top Level
☐ Agent Billing Contact	☐ Agent Billing Contact	☐ Agent Billing Contact
☐ Agent Assigned to Product	☐ Agent Assigned to Product	☐ Agent Assigned to Product
☐ Agents Assigned to Member	☐ Agent Assigned to Member	☐ Agent Assigned to Member
☐ Agent Alternate Email-Phone	☐ Agent Alternate Email-Phone	☐ Agent Alternate Email-Phone
☐ Dependents Attached to Member	☐ Dependents Attached to Member	☐ Dependents Attached to Member

To Users

If the recipient of the Email will be dynamic, meaning it changes, use these check boxes to identify the filed to be used.

CC Users

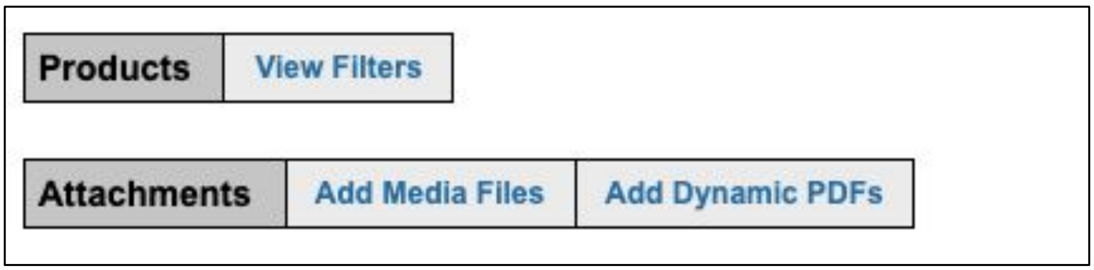
To Carbon Copy a dynamic address, use these boxes to identify the field.

BCC Users

To Blind Carbon Copy a dynamic address, use these boxes to identify the field

Filtering Products and Adding Attachments

When building your communication, you will need to decide if you will need to filter the communication based on product, and if it will have attachments. Example: Do you want your communication to only show for specific products in the recipient's Letter drop down on their profile?



Products
By filtering the Products in this section, the email will populate and pull data from that program if the member has two or more on their profile. Note: By default, the system pulls data from the product listed first on the profile.

Attachments:

Add Media Files
To Attach documents to an email, use this section to select the file from the server. Only one Document can be selected for attachment at a time. Total attachment limit is 20MB. (You must double click on the picture or document you want to attach after searching.)

Add Dynamic PDFs
The information added to this section will create a PDF that is attached to the email communication. It can contain logos, pictures, and system populated dynamic fields, such as Member name and ID.

Adding Dynamic Data Codes

e123 offers Dynamic Data Codes. These are prebuilt codes that can be added to communications to personalize them.

Data Dynamic Codes
Dynamic data is information that is periodically updated, meaning it changes over time as new information becomes available. Member Data Codes are how you place variable Member information within your communication templates. Agent Data Codes place Agent Data.

Custom Data
One of the coolest features of using dynamic data is that clients can use their own verbiage and nomenclature throughout their system. As a result, some of the following display fields are blank. The display for these codes are dependent on what your system has entered.

To Insert:
1. Put your cursor in your content where you would like to insert dynamic data.
2. Select the Data type you need to insert from the drop- down list and click Insert.
3. The Data Code is now inserted into your content and you can move and format the code like you would any other text.

More information on Dynamic Codes and a list of available codes for Agents and Members are at the back of this training guide.

Version: e123_Documentation_Email/SMS_Setup_v1_20230427

Content Boxes - Text Version

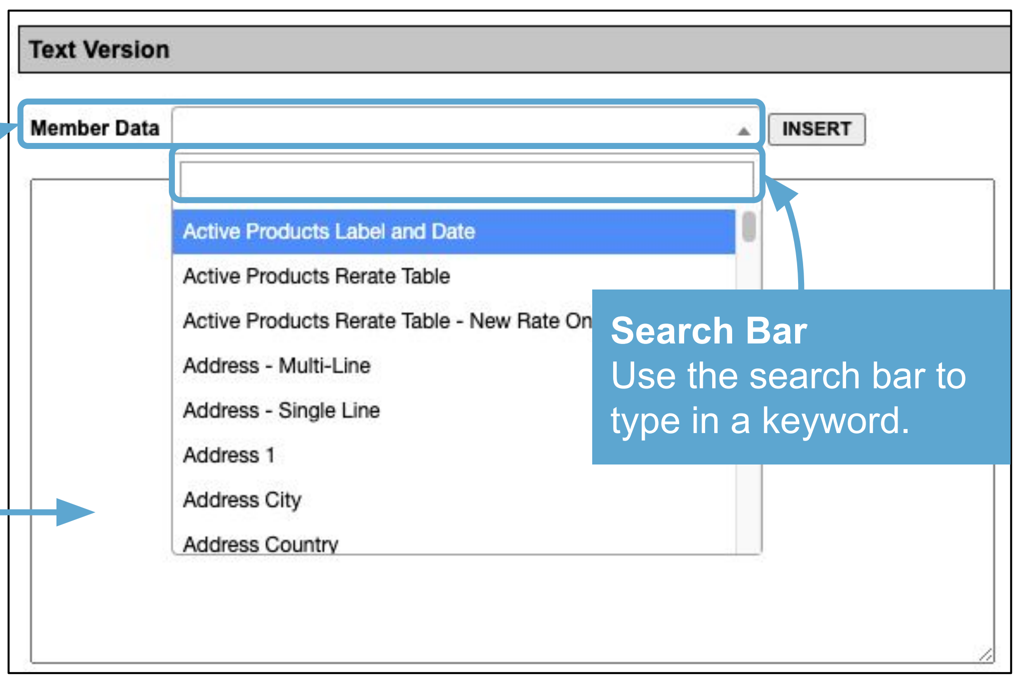
A content box is an electronic field that holds text and images content for comprising an electronic message. The features available within a content box are different depending on the type of message.

Text Version
Plain text is a loose term for data (e.g. file contents) that represent only characters of readable material but not its graphical representation nor other objects (layout, images, etc.). It may include a limited number of characters that control simple arrangement of text, such as spaces or line breaks.

Templates are Plain Text by default. You will need to manually change to another template Type.

Member Data
Use the drop down option to input dynamic data that you want the system to populate/auto-fill.

Text Box
Type the information you want to send in the body of the text box.

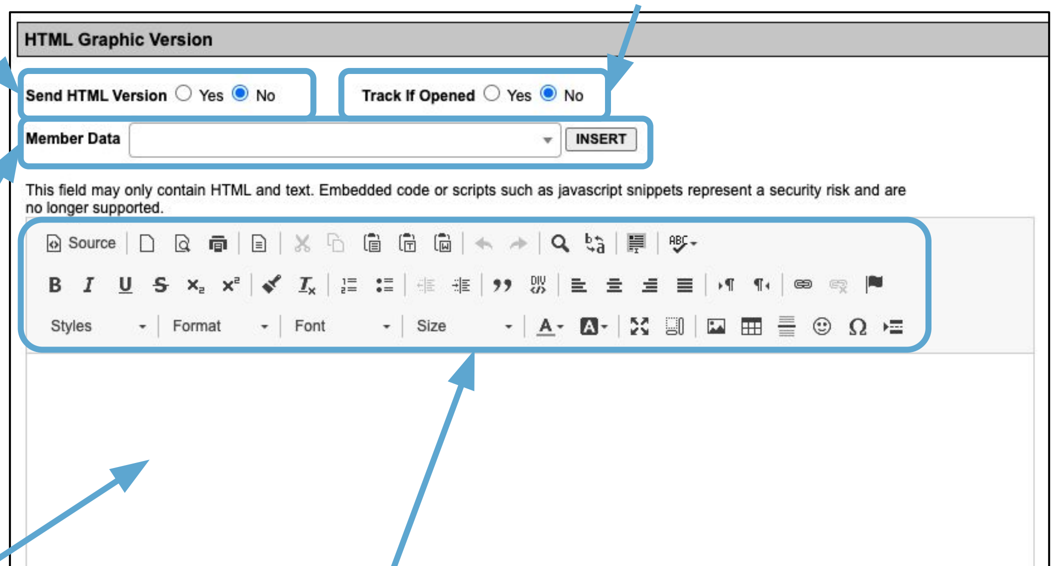


Content Boxes - HTML Graphic Version

HTML Graphic Version
HTML stands for HyperText Markup Language, the way web pages and email templates are coded so that text is formatted and images are added. Detailed information on the function of HTML Buttons is at the back of this guide.

Tracking
Selecting Yes will track if the message is opened by the recipient.

Send HTML Version
Selecting Yes will set the HTML version of the template to send.



Member Data
Use the drop down option to input dynamic data that you want the system to populate/auto-fill. Also has the Search Bar.

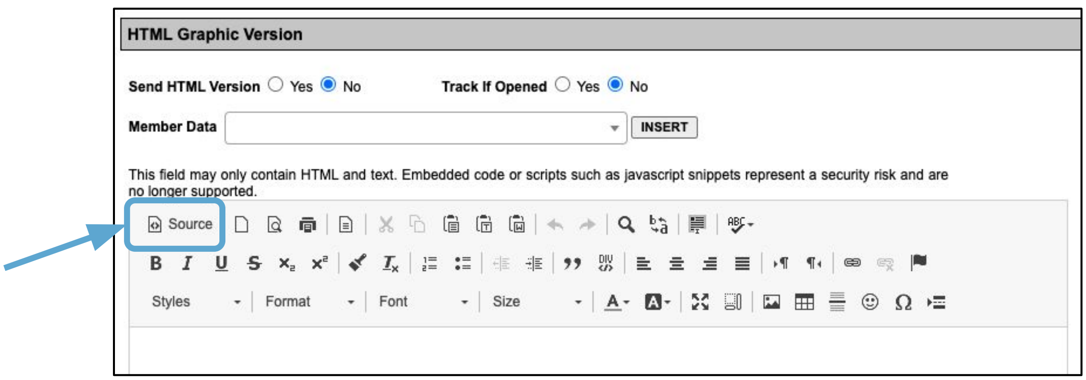
Text Box
Type the information you want to send in the body of the text box.

Formatting
This is what you will use to format your communication. You can view the layout, copy and paste wording, bold and change font sizes, and add pictures, anchors and links.

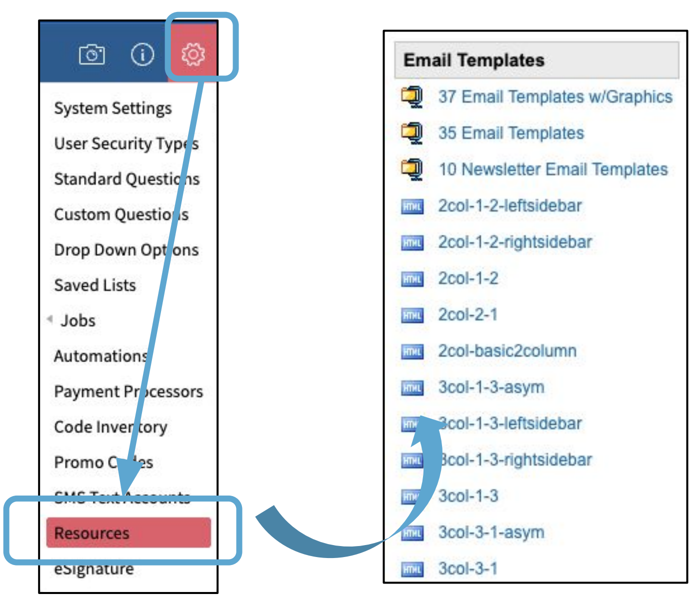
HTML Graphic Version - Using HTML Source Coding

Using Source to Build HTML Templates
If your organization has pre-set HTML/marketing templates, click the Source button to input the code for the communication.

Once it's pasted, reclick the Source button to view what the recipient will see.



If your organization does not have predefined templates, navigate to the system Gear > Resources. You will find a column of Email Templates. Click the links to find a template that you would like to use.



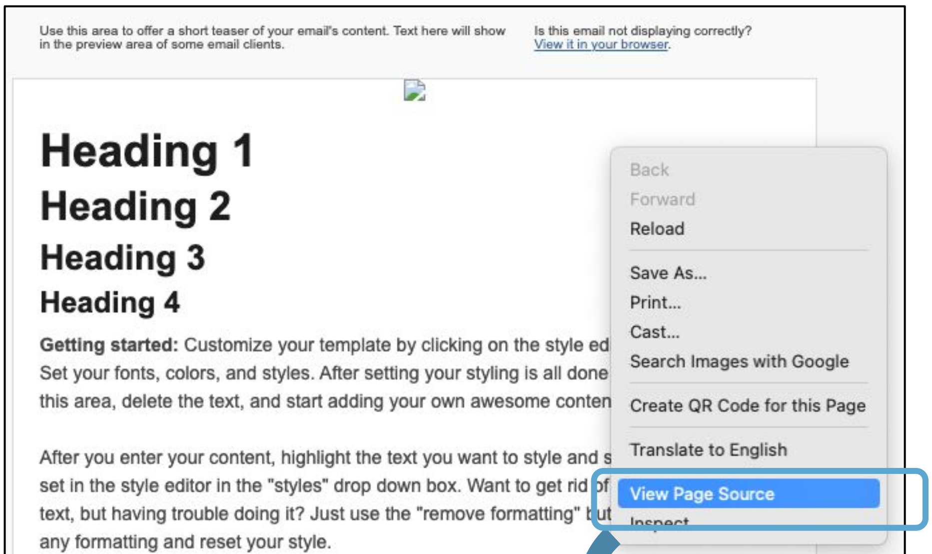
You will find multiple layouts ranging from the simple to complex.

These are meant to be customized to include your organization's colors, logos, and pictures.

HTML Graphic Version - Using HTML Source Coding - continued

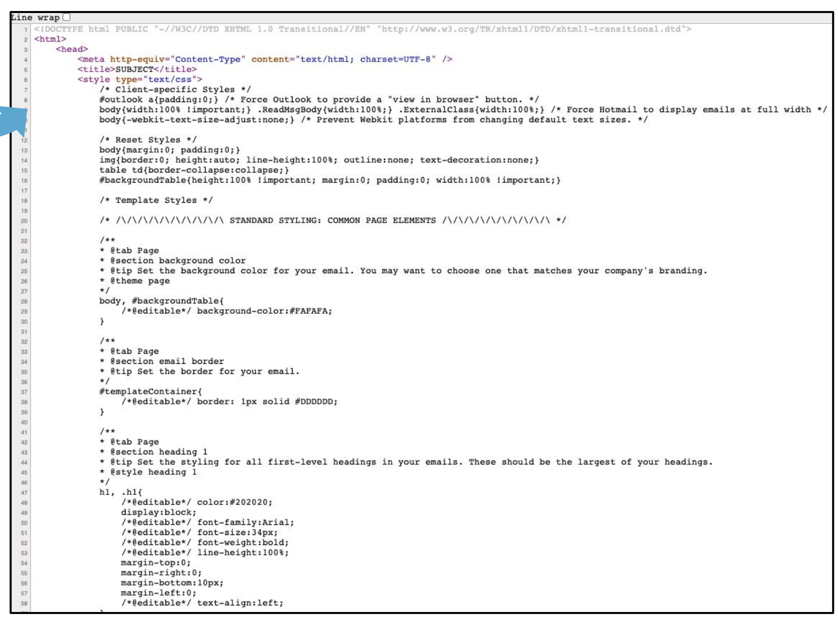
Selecting an e123 Prebuilt Template

Once you have found a template that you need, right click the page with your mouse and select “View Page Source.”



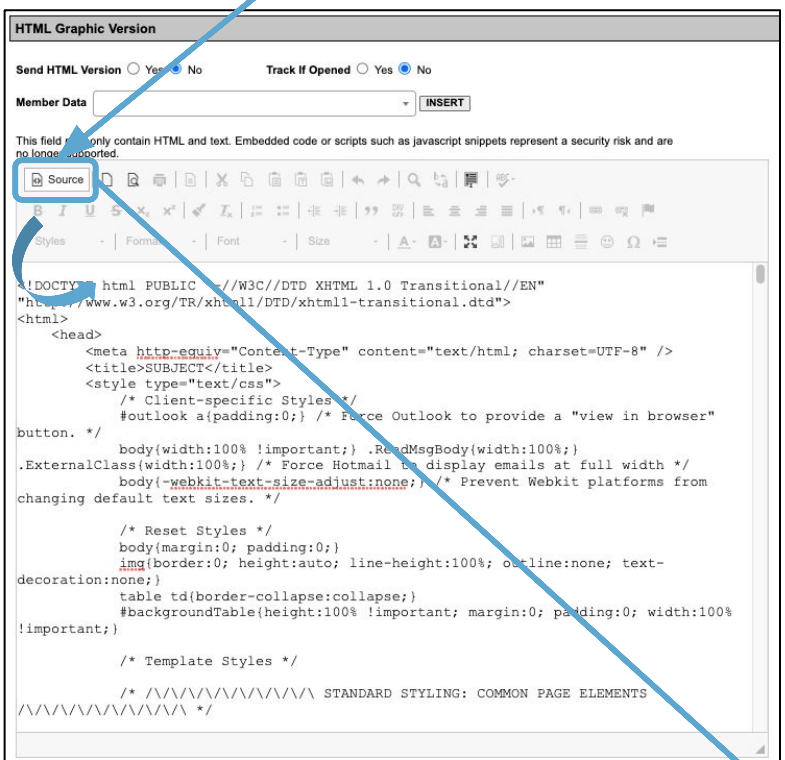
Copying the Code

Copy the entire HTML coding that generated.

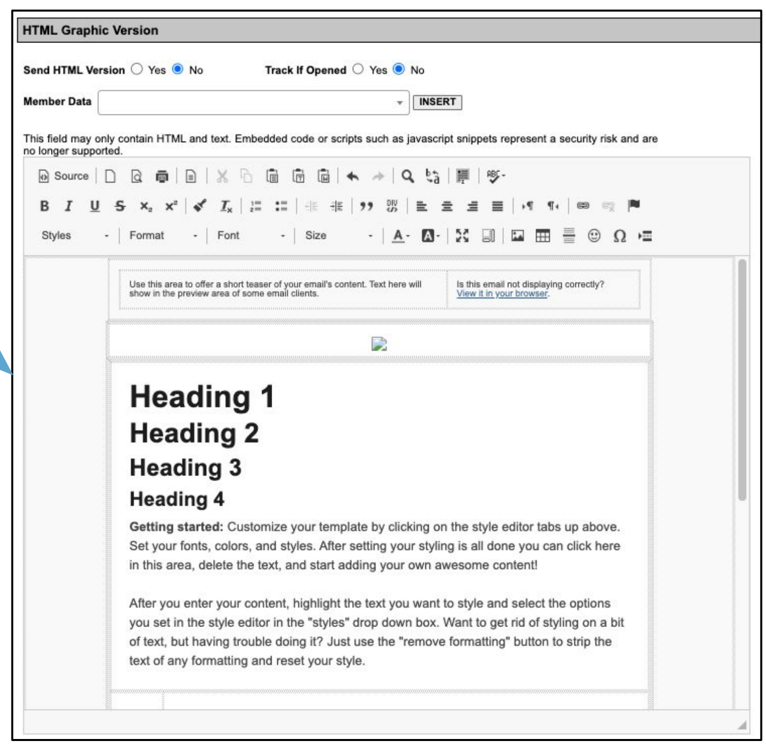


HTML Graphic Version - Using HTML Source Coding - continued

Pasting the Code
Navigate back to your page with the HTML text box. Click on the “Source” button, and paste the code into the text box.



Viewing the Template
Click Source again. Now you can view the communication as the recipient would see it.

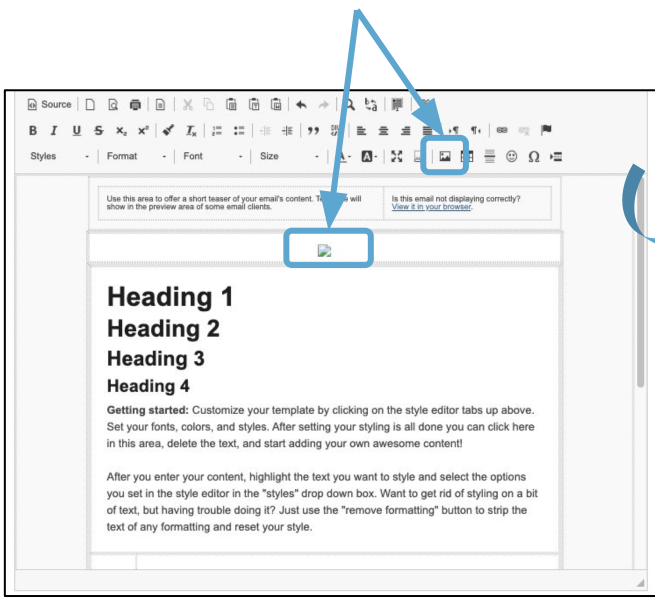


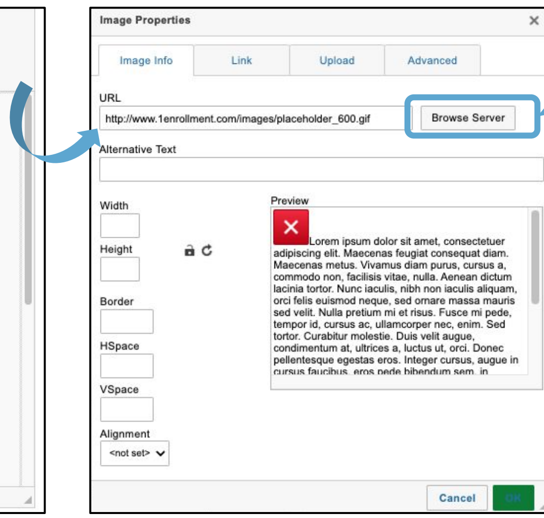
The template can be manipulated either via the HTML coding or via the text box, however your team decides to update it.

HTML Graphic Version - Using and Linking an Image

A picture must be linked to the system and your Media file in order for it to display in your communication if you will be sending it via email.

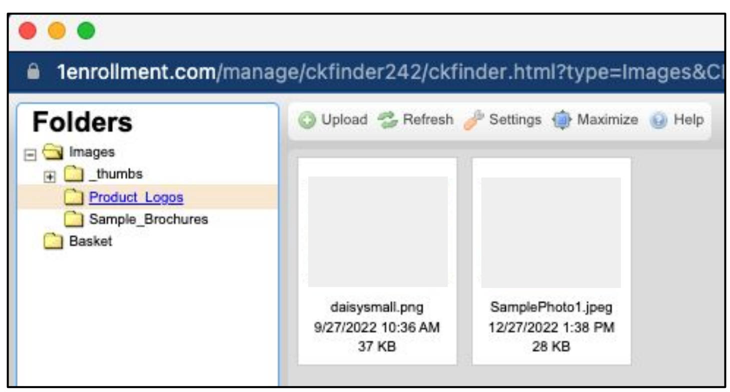
1 Choose where you would like to input the image. In the sample templates, you will see placeholders for ideas on where to input one. Double click the placeholder icon or click the picture in the format bar.





2 Click "Browse Server" to find your picture.

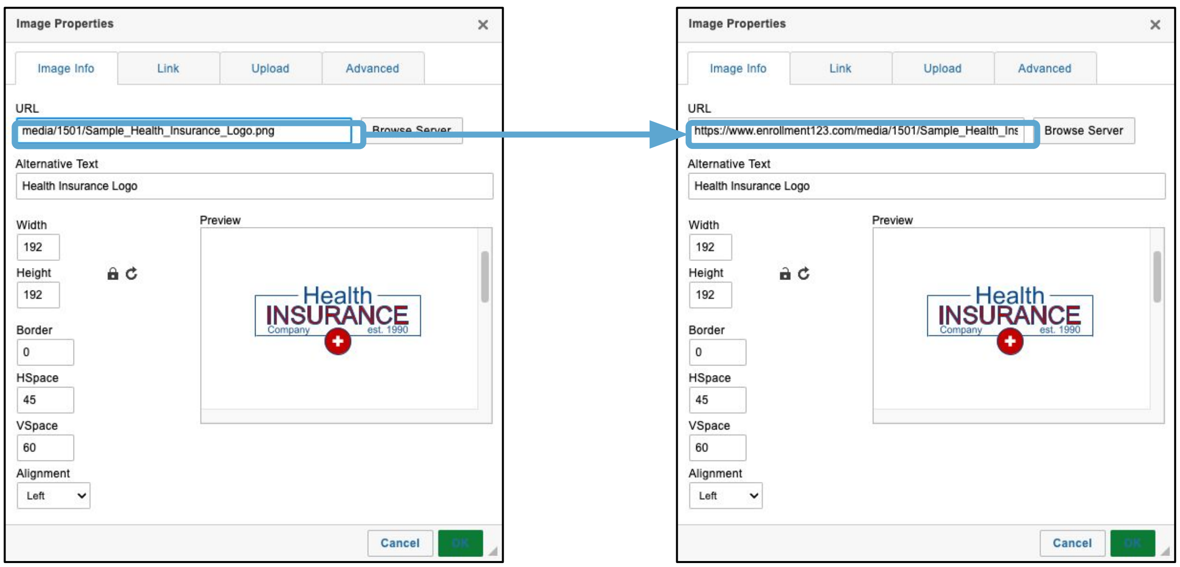
3 Locate your picture in the appropriate folder and double click it. If you are unable to locate it, select "Upload" and upload it from your computer.



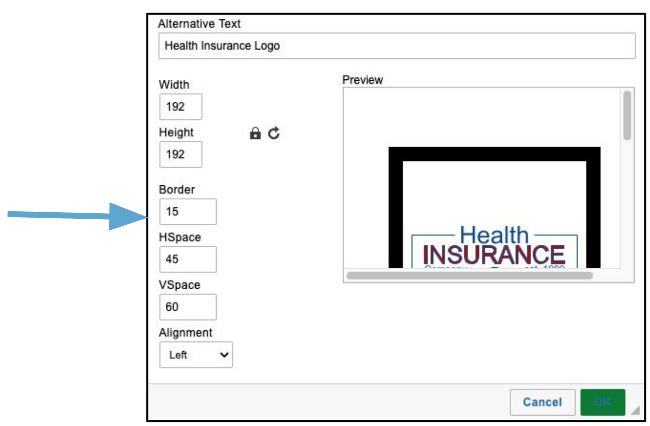
HTML Graphic Version - Linking an Image - continued

If you are not sending your communication via email to a person/people in your back office, you do not need to link your image to the platform. If your communication will be sent via email, you will need to have the full URL attached to your image *(see below)*.

4 Input https://www.enrollment123.com in front of “/media” in the picture’s URL.



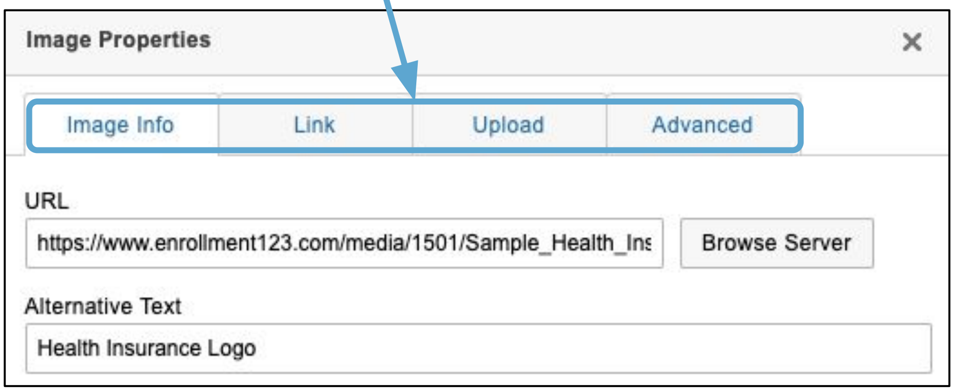
5 Then, work on deciding: if you want text to show should the recipient’s email carrier block images, the size, if you want a border, how far the picture will be from the template border, and alignment.



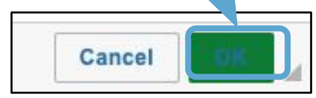
HTML Graphic Version - Linking an Image - continued

Now, your organization can decide whether or not you want your image to have additional functionality, such as linking to an external website.

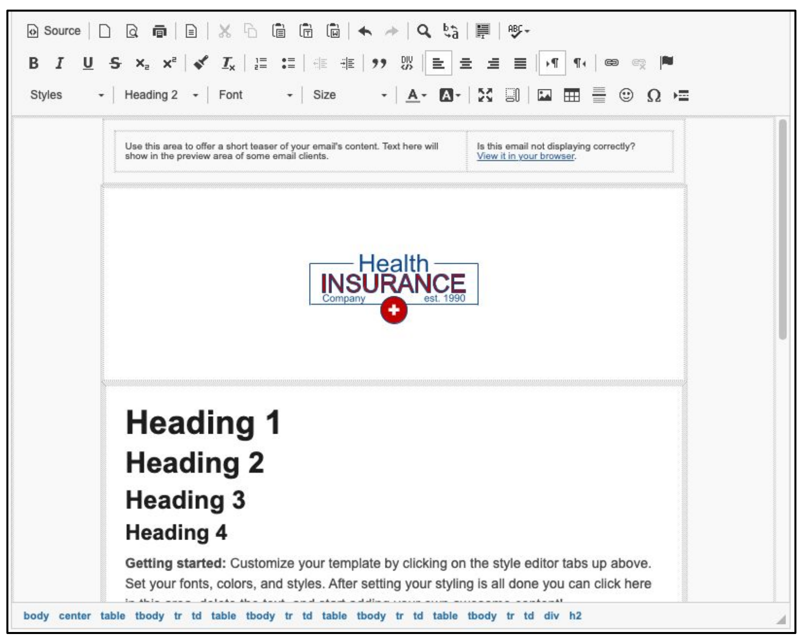
6 Use the additional Image Properties navigation tabs as needed.



7 Click “OK” once you’re complete.



8 Review your template and pictures. Continue to edit your communication as desired.

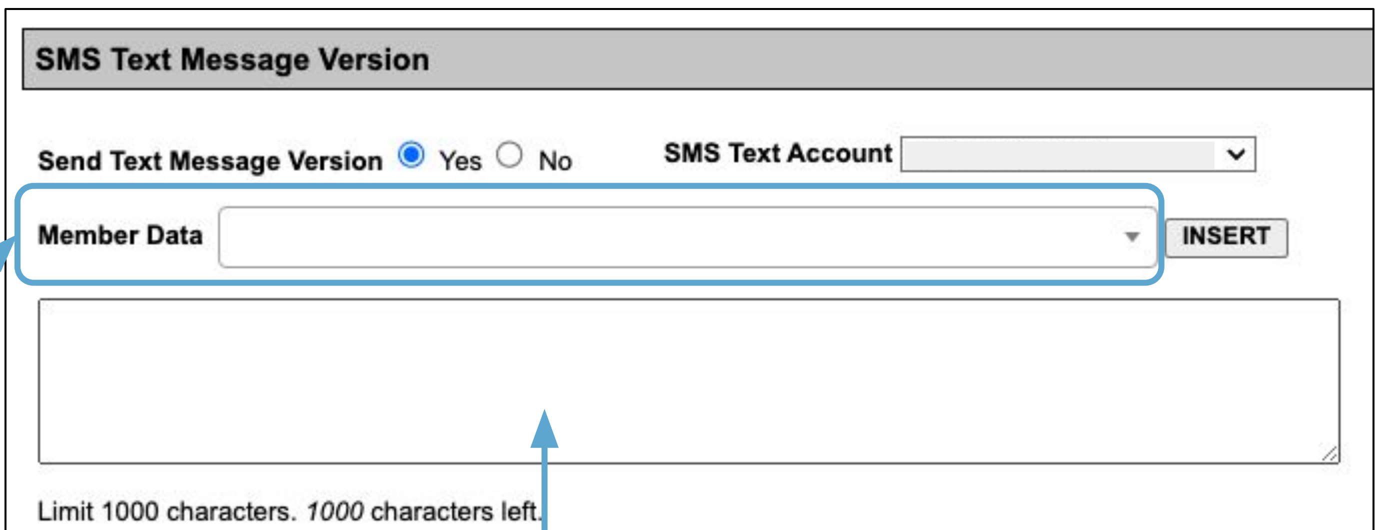


Content Boxes - SMS Text Message Version

SMS Text Message Version
SMS stands for Short Message Service. Standard SMS messages are limited to 160 characters per message.

Send SMS Version
Selecting Yes will make the template an SMS message template.

SMS Text Account
In order to create and send an SMS template, each template needs to have the SMS Account identified and selected here.



Member Data
Use the drop down option to input dynamic data that you want the system to populate/auto-fill. *The search bar is available.*

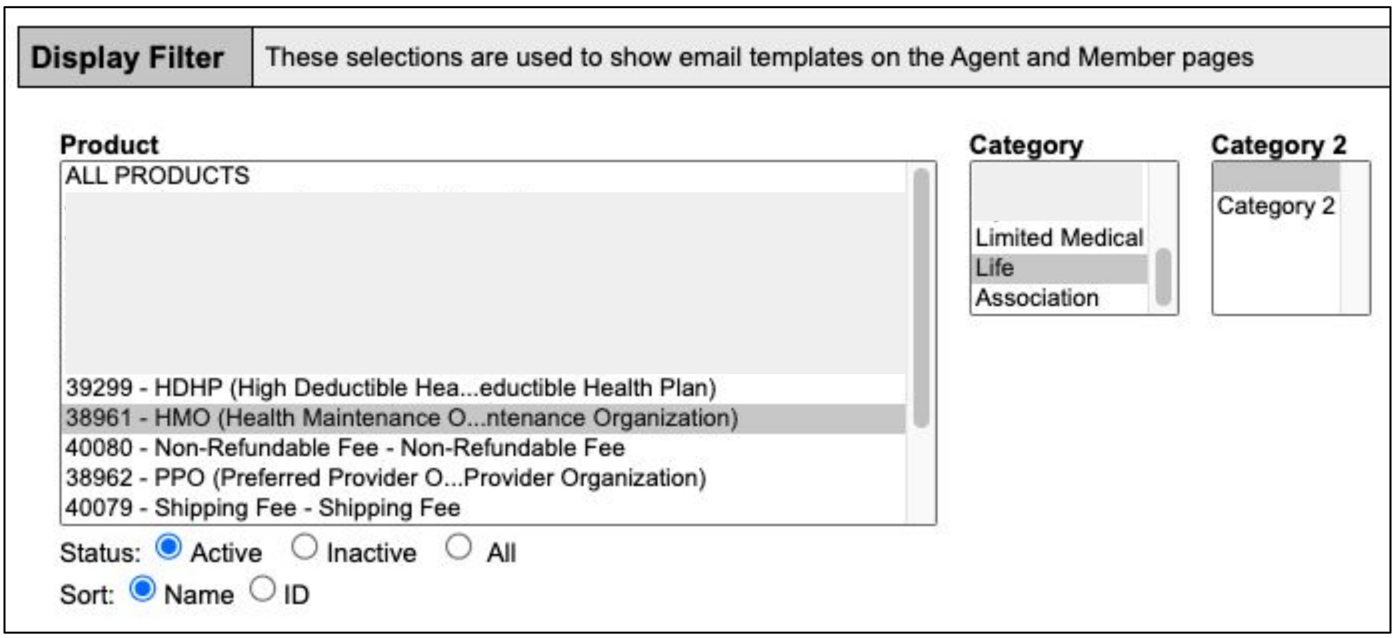
Text Box
Type the information you want to send in the body of the text box.

Please note: If your organization wants to only send a text, make sure that the HTML "No" radio button is selected. Otherwise, your recipient will receive a blank email at the same time if nothing is in it.

Using the Display Filter for Your Template

These selections are used to show email templates on the Agent and Member pages.

Your organization should decide whether or not you would like to use this filter. Remember, should you build an additional product that you would like to use the template for, you will need to come back to update the communication accordingly.



Now that you've built your communications, we suggest you use test accounts in your back office to make sure each communication is sent and received as expected.

Content Boxes Recap

Determine the method by which your template will be sent, and enter the data into the corresponding Content Box:

Text Version
• Unformatted
• For users who are not able to view emails with HTML

HTML Version
• Formatted
• For most users who receive emails that support HTML

SMS Text Message Version
• Unformatted, 160 character limit
• For users to receive via phone number

Agent Dynamic Data Codes

Here are the codes that are available to use when building your Agent communication.

LABEL	CODE	DISPLAY
Address - Multi-Line	$multiline_address	123 Main Street City, ST 00000
Address - Single Line	$singleline_address	123 Main Street, City, ST 00000
Address 1	$address1	123 Main Street
Address City	$city	City
Address State	$state	ST
Address Zip code	$zip	00000
Agent Code	$code	000000
Agent ID	$agent_id	000000
Agent Label	$agent_label	Agent Label

Agent Dynamic Data Codes - continued

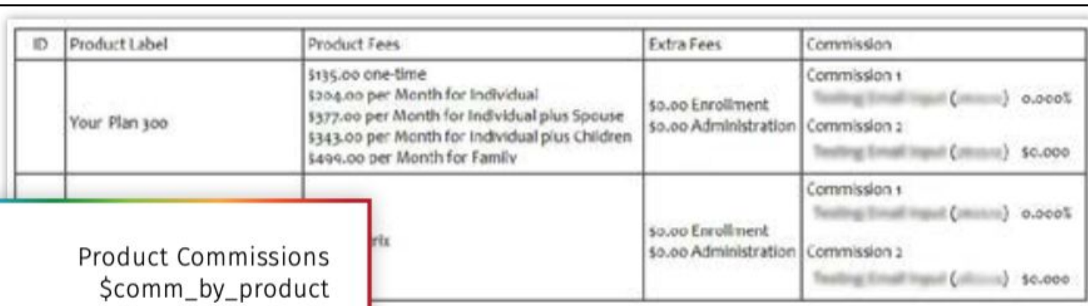
Additional codes available to use when building your Agent communication.

LABEL	CODE	DISPLAY
Agent Message	$message	Message Text Displays
Agent Password	$password	0.0%
Agent Sign Up Passwords	$agent_signup_passwords	Displays the Commission Password List from agent level and below
Agent Username	$username	username
Contact Email 1	$email	email@email.com
Contact Email 2	$email2	email2@email.com
Contact Fax	$fax	(123) 456-7897
Contact Phone 1	$phone1	(123) 456-7897
Contact Phone 2	$phone2	(123) 456-7897
Date Created	$created_short	01/01/2012
Date Created	$created_long	January 1, 2012
Date Today	$today_short	01/01/2012
Date Today	$today_long	January 1, 2012
Date Today Month Year	$today_month_year	January 2012
Date Today Year	$today_year	2012
Name Company	$company	Name Company
Name First	$firstname	First
Name Full	$fullname	First M. Last
Name Last	$lastname	Last
Parent Agent	$parent	000000 - Agent Label

Agent Dynamic Data Codes - continued

Additional codes available to use when building your Agent communication.

LABEL	CODE	DISPLAY
Product List	$product_list	Product Name - Category
Tracking Flag	$flag	Track Flag
Tracking Next Step	$nextstep	Next Step
Tracking Source	$source	Track Source
Tracking Source Detail	$detailsource	Track Detail
Tracking Stage	$stage	Stage
Tracking Status	$status	Status
URL Management Website	$manage_website	http://www.ebenenroll.com/manage/
URL Sales Website	$sales_website	http://www.ebenenroll.com/000000
Product Commissions	$comm_by_product	
Product Table	$product_table	



ID	Product Label	Product Fees	Extra Fees	Commission
	Your Plan 300	$135.00 one-time $204.00 per Month for Individual $377.00 per Month for Individual plus Spouse $343.00 per Month for Individual plus Children $499.00 per Month for Family	$0.00 Enrollment $0.00 Administration	Commission 1 0.000% Commission 2 $0.000
		rix	$0.00 Enrollment $0.00 Administration	Commission 1 0.000% Commission 2 $0.000

Product Commissions
$comm_by_product

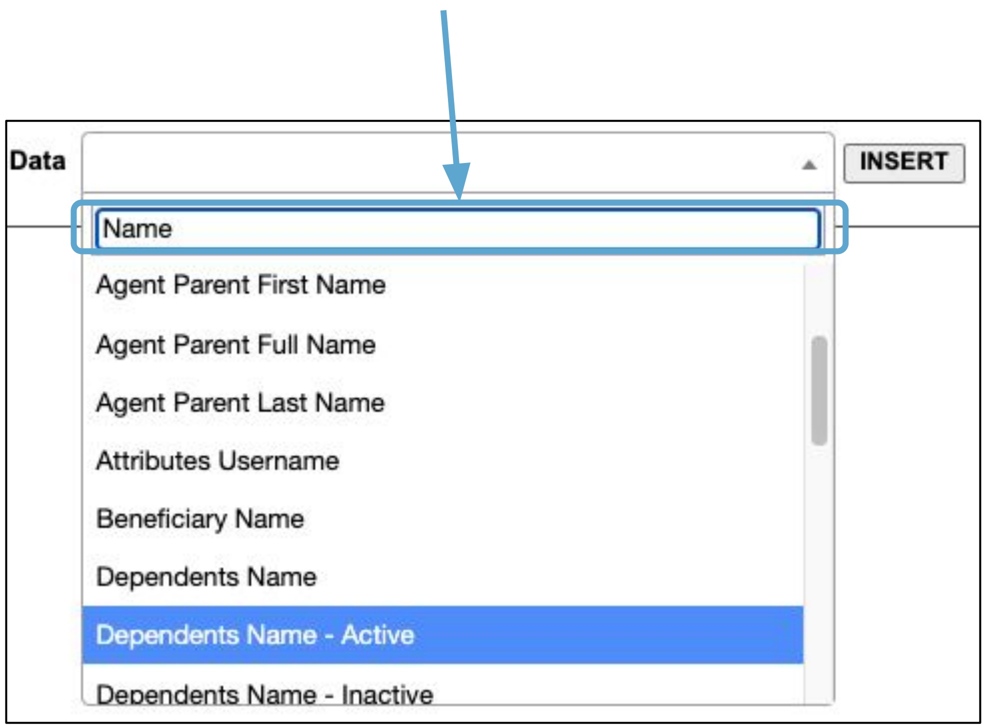
ID	Product Label	Product Fees	Extra Fees
	Your Plan 300	$135.00 one-time $204.00 per Month for Individual $377.00 per Month for Individual plus Spouse $343.00 per Month for Individual plus Children $499.00 per Month for Famil	$0.00 Enrollment $0.00 Administration
	Your Plan 750	Rate Matrix	

Product Table
$product_table

Member Dynamic Data Codes

Custom Data
One of the coolest features of using dynamic data is that clients can use their own verbiage and nomenclature throughout their system. As a result, some of the following display fields are blank. The display for these codes are dependent on what your system has entered.

Though the following list may look like a lot, remember, there is a search function in each of the Data drop down boxes so that you can find what you are looking for easier.



Example: Searching the word "Name"

Member Dynamic Data Codes - continued

LABEL	CODE	DISPLAY
Active Date Month and Year	$activedatemonthyear	Month 0
Active Date Plus 5 Years	$5yearsFromActiveDate	MM/DD/YYYY
Address - Multi-Line	$multiline_address	123 Main Street, City, ST 00000
Address - Single Line	$singleline_address	123 Main Street, City, ST 00000
Address 1	$address1	123 Main Street
Address City	$city	City
Address Country	$country	United States
Address International	$international	
Address State	$state	ST
Address Zip code	$zip	*00000*
Age At Enrollment	$enrollmentage	45
Agent Address - Multi-Line	$agent_multiline_address	1000 W Street Road Ste 209, City, ST 00000-0000
Agent Address - Single Line	$agent_singleline_address	1000 W Street Road Ste 209, City, ST 00000
Agent Address City	$agent_City	City
Agent Address State	$agent_State	ST
Agent Adress Zip code	$agent_Zipcode	11111
Agent Assigned	$agent_assigned	First Last
Agent Code	$agentcode	11111
Agent Email	$agent_Email	email@agentemail.com
Agent Fax	$agent_Fax	(000)000-0000

Member Dynamic Data Codes - continued 2

LABEL	CODE	DISPLAY
Agent ID	$agentid	11111
Agent Label	$agent_label	Agent Label
Agent Name Company	$agent_company	Company Name Here
Agent Name First	$agent_firstname	First
Agent Name Full	$agent_fullname	First Last
Agent Name Last	$agent_lastname	Last
Agent Phone	$agent_Phone	(000)000-0000
Agent Website	$agent_homepage	http://www.enrollment123.com/11111
Attributes Code 1 / PIN	$pin	
Attributes Code 2	$code2	
Attributes Gender	$gender	M
Attributes Message	$message	
Attributes Password	$password	
Attributes Source	$source	
Attributes Source Detail	$srcDetail	
Attributes Username	$username	
Broker Attribute 1	$broker_attributes1	
Broker Attribute 2	$broker_attributes2	
Broker Attribute 3	$broker_attributes3	
Broker Attribute 4	$broker_attributes4	

Custom Data

The display for these codes are dependent on what your system has entered.

Member Dynamic Data Codes - continued 3

LABEL	CODE	DISPLAY
Broker Code	$broker_code	The display for these codes are dependent on what your system has entered.
Broker Code 2	$broker_code2	
Broker Code 3	$broker_code3	
Contact Email 1	$email	email1@memberemail.com
Contact Email 2	$email2	email2@memberemail.com
Contact Fax	$fax	(000) 000-0000
Contact Phone 1	$phone1	(000) 000-0000 x0
Contact Phone 2	$phone2	(000) 000-0000
Contact Phone 3	$phone3	(000) 000-0000
Date at 80 Years Old	$DateAt80YearsOld	11/10/2050
Date of Birth	$dob_short	(01/01/2012
Date of Birth	$dob_long	January 1, 2012
Date of Employment End	$employment_date_end_mmddyyyy	01/01/2012
Date of Employment End	$employment_date_end_medium	January 1, 2012
Date of Employment Start	$employment_date_start_ mmddyyyy	01/01/2012
Date of Employment Start	$employment_date_start_medium	January 1, 2012
Date Refund	$refund_date	January 1, 2012
Date Today	$today_short	01/01/2012
Date Today	$today_long	January 1, 2012
Date Today Month Year	$today_month_year	January 2012

Member Dynamic Data Codes - continued 4

LABEL	CODE	DISPLAY
Date Today Year	$today_year	2012
Dependents Name	$dependent_name	John Doe
Dependents Name - Active	$activedependent_name	First Last
Dependents Name - Inactive	$inactivedependent_name	First Last
Dependents Name/Relation	$dependent_short	One Child - Son
Dependents Name/Relation - Active	$activedependent_short	One Child - Son
Dependents Name/Relation - Inactive	$inactivedependent_short	One Child - Son
Dependents Name/Relation/Gender/DOB	$dependents	One Child - Son - F - 01/01/1901
Dependents Name/Relation/Gender/DOB-Active	$activedependents	One Child - Son - F - 01/01/1901
Dependents Name/Relation/Gender/DOB-Inactive	$inactivedependents	One Child - Son - F - 01/01/1901
Document - Newest - Label and Date	$documentNewestLabelDate	Payment Authorization
Email Opt Out Link	$OptOut	/email/unsubscribe?id1=
Email View Online Link	$OnlineViewEmail	/email?id1=
Has Dependents	$hasdependents	Yes / No
ID Customer/Member	$memberid	111111111
ID Internal	$internalid	XXXXXXXXXXX
ID Product Code 2	$ProductCode2	
ID Product Code/Policy	$ProductPolicyNumber	33333
ID System	$systemid	0
Name Company	$company_name	Company Name

Member Dynamic Data Codes - continued 5

LABEL	CODE	DISPLAY
Name First	$firstname	First
Name First - All Caps	$capfirstname	FIRST
Name Full - All Caps	$capfullname	FIRST LAST
Name Full Name	$fullname	First Last
Name Last	$lastname	Last
Name Last - All Caps	$caplastname	LAST
Payment Active Method	$active_payment	Credit Card - xxxxxxxx1111
Payment Method ACH Account Number	$paymethod_achacc	123456789
Payment Method ACH Name on Account	$paymethod_achname	First Last
Payment Method ACH Routing	$paymethod_achaba	123456789
Payment Method Address	$paymethod_address	123 Main Street, City, ST 00000
Payment Method CC Exp	$paymethod_ccexp	00/0000
Payment Method CC Last 4	$paymethod_ccnum	xxxx-xxxx-xxxx-1111
Payment Method CC Name on Card	$paymethod_ccname	First Last
Payment Method CC Type	$paymethod_cctype	Visa
Payment Method City	$paymethod_city	City
Payment Method Pay Type	$paymethod_type	Payment Type: Credit Card
Payment Method State	$paymethod_state	ST
Payment Method Zipcode	$paymethod_zip	11111
Payment Total Payments	$paymentTotal	1

Member Dynamic Data Codes - continued 6

LABEL	CODE	DISPLAY
Premium Amount Fee	$Premium_Fee	$111.11
Premium Due Billing Day	$Premium_Due_Date	2
Product Active Products Only	$active_only_date_code_products	Product XYZ, $59.00 One Time Enrollment, $899.00 Level A - Monthly Product
Product All Products Data Dates/Code	$all_date_code_products	
Product All Products Data Long	$all_products	
Product All Products Data Short	$all_short_products	
Product All Products Total Amount	$totalFeeAmount	
Product Amount	$product_amount	$1.00
Product Amount Detail	$product_fees	$5.00-One-Time-Enrollment$10.00-Member-Monthly-Product
Product Amount Next Billing	$nextBillingAmount	$0.00
Product Benefit Level	$product_benefit	Member + Child
Product Category	$product_category	
Product Category 2	$product_subcategory	
Product Date Active	$effective_short	3/25/2015
Product Date Active	$effective_long	25-Mar-15
Product Date Billing	$billing_short	3/11/2015
Product Date Billing	$billing_long	11-Mar-15
Product Date Created	$created_short	3/11/2015
Product Date Created	$created_long	11-Mar-15
Product Date Fulfillment	$fulfillment_short	5/9/2016

Custom Data

The display for these codes are dependent on what your system has entered.

Member Dynamic Data Codes - continued 7

LABEL	CODE	DISPLAY
Product Date Fulfillment	$fulfillment_long	May 9, 2016
Product Date Hold	$hold_short	01/01/2012
Product Date Hold	$hold_long	January 1, 2012
Product Date Inactive	$termed_short	01/01/2012
Product Date Inactive	$termed_long	January 1, 2012
Product Date Next Billing	$recurring_short	01/01/2012
Product Date Next Billing	$recurring_long	January 1, 2012
Product Date Paid Through	$paidThrough_short	01/01/2012
Product Date Paid Through	$paidThrough_long	January 1, 2012
Product Description	$product_description	
Product Fulfillment Link	$fulfillment_link	
Product Hold Reason	$holdReason	
Product Hold Type	$holdType	
Product ID	$product_id	12345
Product Inactive Reason	$reasonForCancel	
Product Label	$product_label	Product B
Product Label Admin	$product_adminlabel	Product B 5
Product Labels Active Products	$active_product_labels	Product B
Product Newest Active Date Active Products Only	$newest_active_date_active_only_date_code_products	Product B $5.00 One Time Enrollment $10.00 Member Monthly Product Active Date: March 25, 2015
Product Newest Active Date Products	$newest_active_date_date_code_products	Product B $5.00 One Time Enrollment $10.00 Member Monthly Product Active Date: March 25, 2015

Custom Data

The display for these codes are dependent on what your system has entered.

Member Dynamic Data Codes - continued 8

LABEL	CODE	DISPLAY
Product Newest Created Date Active Products	$newest_created_date_active_date_code_products	
Product Newest Created Date Active Products Only	$newest_created_date_active_only_date_code_products	
Product Newest Created Date Administration Fee Only (detail)	$newest_created_date_administration_fee_only_detail	
Product Newest Created Date Administration Fee Only (short)	$newest_created_date_administration_fee_only_short	
Product Newest Created Date Enrollment Fee Only (detail)	$newest_created_date_enrollment_fee_only_detail	Product B Enrollment Fee - $5.00 - One-Time
Product Newest Created Date Enrollment Fee Only (short)	$newest_created_date_enrollment_fee_only_short	
Product Newest Created Date Product Fee Only (detail)	$newest_created_date_product_fee_only_detail	
Product Newest Created Date Product Fee Only (Short)	$newest_created_date_product_fee_only_pricebenefit	
Product Newest Created Date Product Fee Only (short)	$newest_created_date_product_fee_only_short	Product B Product Fee - $10.00
Product Newest Created Date Products	$newest_created_date_date_code_products	Product B $5.00 - One-Time - Enrollment $10.00 - Member - Monthly - Product Active Date: March 25, 2015
Product Quantity	$quantity	2
Product Shipping Carrier	$ProductShippingCarrier	
Product Shipping Link	$ProductShippingLink	
Product Shipping Tracking	$ProductShippingTracking	
Product Type 1	$productType1	
ProductType 2	$productType2	
Signature Checkbox	$signaturecheckbox	
Signature Link	$signaturelink	/sig/?a=
Total Recurring Amount Active Products	$activeProductNextBillingAmount	
Tracking Call Status	$callstatus	pulls from field

Custom Data

The display for these codes are dependent on what your system has entered.

Member Dynamic Data Codes - continued 9

LABEL	CODE	DISPLAY
Tracking Description	$description	
Tracking Flag	$flag	
Tracking Next Step	$nextstep	
Tracking Source	$source	
Tracking Source Detail	$detailsource	
Tracking Stage	$stage	
Tracking Status	$status	
Transaction Last Approved Data Long	$last_approved	$25.75 - December 2, 2021 - Credit Card - Approved - SALE - Payment 1 - Completed - - - D8BAC10EF27271282396190DAC37A477 - Products: Product 1 (12345)
Transaction Last Approved Data Short	$last_short_approved	$25.75 - December 2, 2021 - Credit Card - SALE - Approved - Products: Product 1 (12345)
Transaction Last Declined Data Long	$last_declined	$0.00 - December 13, 2021 - Credit Card - SALE - Declined - Payment 2 - Completed - 0FF723E8E58C0F622CF23ACD3609C659 - Products: Product 1 (12345)
Transaction Last Declined Data Short	$last_short_declined	$0.00 - December 13, 2021 - Credit Card - SALE - Declined - Products: Product 1 (12345)
Transaction Newest Amount	$last_amount	$0.00
Transaction Newest Auth Code	$last_authcode	
Transaction Newest Authorized	$last_bAuthorized	Declined
Transaction Newest Charged Back	$last_bChargedBack	
Transaction Newest Completed	$last_bCompleted	Completed
Transaction Newest Data Long	$last_trans	$0.00 - December 13, 2021 - Credit Card - SALE - Declined - Payment 2 - Completed - - - 0FF723E8E58C0F622CF23ACD3609C659 - Products: Product 1 (12345)

Custom Data

The display for these codes are dependent on what your system has entered.

Member Dynamic Data Codes - continued 10

LABEL	CODE	DISPLAY
Transaction Newest Data Short	$last_short_trans	$0.00 - December 13, 2021 - Credit Card - SALE - Declined - Products: Product 1 (12345)
Transaction Newest Date	$last_date_long	December 13, 2021
Transaction Newest Full Gateway Response	$last_fullGatewayResponse	
Transaction Newest Paid Through End Date	$last_dtPaidThroughEnd_long	May 31, 2015
Transaction Newest Paid Through Start Date	$last_dtPaidThroughStart_long	May 31, 2015
Transaction Newest Payment Method	$last_paymentMethod	ACH/Bank Draft
Transaction Newest Payment Number	$last_paymentnumber	2
Transaction Newest Payment Processor	$last_payment_processor	Save
Transaction Newest Payment Processor Display Text	$last_payment_proc_text	3.5% processing fee will be added to transaction total.
Transaction Newest Product List	$last_products	Product
Transaction Newest Refunded	$last_bRefunded	
Transaction Newest Transaction ID	$last_uniquecode	100FD0E4B348999F62737EEB23D1DE08
Transaction Newest Type	$last_type	SALE
Transaction Summary Long	$trans_history	
Transaction Summary Short	$trans_short_history	$958.00 - November 2, 2018 - ACH/Bank Draft - SALE - Approved - Products: Product XYZ

Completed Training

This is the end of the training manual.

If you have any additional questions, or if you would like training documentation for another subject, please reach out to e123 Support Services or your Client Engagement Manager (CEM).

The rest of this page intentionally left blank.