Coding Cheat Sheet

XMERGE Coding

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| **Client Codes** |  |
| Date | <:=datetime\_merge.format(‘%d %B %Y’).lstrip('0'):> |
| Salutation Code | <:=$client.salutation:> |
| Client Address Code | <:=$client.address\_title:>  <:for item in $client.address.filter(‘preferred=True’):>  <:=item.street:>  <:=item.suburb:> <:=item.state.value.upper():> <:=item.postcode:>  <:end:> |
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| **Adviser Codes** |  |
| Adviser Name | <:=$client.client\_adviser.first\_name:> <:=$client.client\_adviser.last\_name:> |
| Phone | <:=$client.client\_adviser.preferred\_phone:> |
| Email | <:=$client.client\_adviser.preferred\_email:> |
| Adviser Qualifications | <:=$client.client\_adviser.user\_qualifications:> |
| Adviser Job title | <:=$client.client\_adviser.jobtitle:> |
| Corporate Authorised Representative No | <:=$client.client\_adviser.authorised\_rep\_no:> |
| Adviser Address (street, suburb, state) | <:for item in $client.client\_adviser.address.filter('type=2'):> <:=item.street.value:> <:=item.suburb:> <:=item.postcode:> <:=item.state:> <:end:> |
| Adviser Telephone | <:=$client.client\_adviser.preferred\_phone |
| Adviser Company | <:=$client.client\_adviser.employer:> |
| Adviser Group Logo | <:=$client.client\_adviser.group\_xmerge\_logo2:> |
| Diary event | <:for schedule in $diaryevent.schedules:>  <:=schedule.startdate.format('%A %d %B %Y'):>  <:end:>  <:for schedule in $diaryevent.schedules:><:=schedule.start.format(‘%H:%M’).lstrip(‘0’):> <:=schedule.start.format(’%p’).lower():><:end:> |
| Credit Representative Number | <:=$client.client\_adviser.xpt\_crn:><:end:> |
| Licensee Details | <:=licensee\_full:> <:=afsl\_licence\_type:> Licence Number <:=afsl\_number:> ABN <:=afsl\_abn:> |
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| Adviser Signature code | <:=$client.client\_adviser.signature:> |

Email Coding

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| Salutation | <:=$recipient.preferred\_name:> <:if $recipient.has\_partner:> and <:=$recipient.partner.preferred\_name:><:end:>, |
| Date of Birth | <:=$recipient.dob:> |
| Adviser Name | <:=$recipient.client\_adviser.first\_name:> <:=$recipient.client\_adviser.last\_name:> |
| Adviser Signature | <:=$recipient.client\_adviser.xmerge\_signature:> |
| Adviser Qualifications | <:=$recipient.client\_adviser.user\_qualifications:> |
| Adviser Job Title | <:=$recipient.client\_adviser.jobtitle:> |
| Adviser Employer | <:=$recipient.client\_adviser.employer:> |
| Adviser Branch | <:=$recipient.client\_adviser.xpt\_branch:> |
| Adviser Licensee Details | <:if $recipient.client\_adviser.xpt\_branch=='Matrix Planning Solutions Limited':> AFSL & ACL 238256 <:end:><:if $recipient.client\_adviser.xpt\_branch=='ClearView Financial Advice Pty Ltd':>AFSL 331367<:end:> |
| Adviser Contact Details | <:for item in $recipient.client\_adviser.address:> <:if item.type=='Business':> <:=item.street:> <:=item.suburb:> <:=item.state:> <:=item.postcode:> <:end:> <:end:> | Phone <: for item in $recipient.client\_adviser.contact :><: if item.type=='Work Phone':><:=item.value:><:end:><:end:> | Email <: for item in $recipient.client\_adviser.contact :><: if item.type=='Work Email':><:=item.value:><:end:><:end: |