

Propertybase Marketing Templates

Customer Documentation

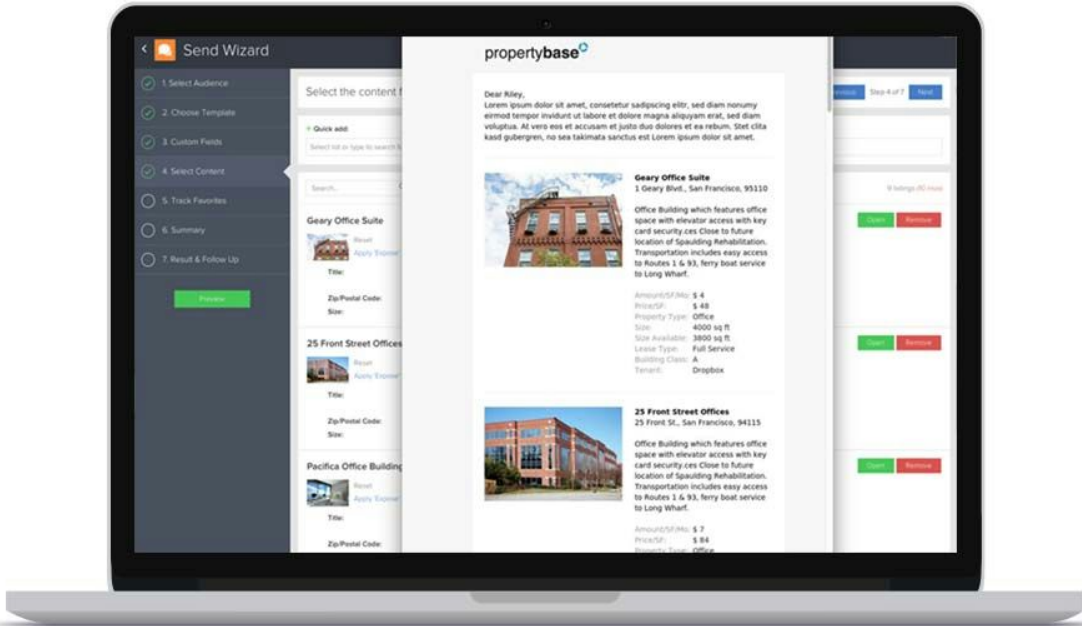


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Overview

With the [New Propertybase Template Engine](#) you can create beautiful and mobile-ready templates for mail merge and email. Market your listings and send out personalized email campaigns to exactly the right target groups using the Propertybase Send Wizard.

In order to add logic and dynamic content such as listings or text snippets to our templates, we rely on an easy to use templating language called [Liquid](#). Customizing our templates has never been easier! This documentation will help you to customize our default set of templates to your company and needs. If you don't already have our templates in Propertybase, [click here to get all available templates and learn how to import them to Propertybase](#). [Here is a complete feature overview of our templates:](#)

- 10+ email templates
- 20+ PDF templates
- Templates for residential real estate companies
- Templates for commercial real estate companies (listings for sale and lease)
- Modern and robust layout to support most email clients
- Responsive layout for mobile devices
- Multi-currency ready
- Easy customizable
- Include weblinks to a landing-page or your website for further details

propertybase[®]

Dear Bobby,
 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi dicitum justo eget enim consectetur, eu sollicitudin lectus lobortis. Donec: maeculis, porta et tunc, sit, lobortis lectus tunc. Cras hendrerit auctor sagittis, non varius nisi elementum semper. Phasellus venenatis augue in euismod rutrum.







Delores Heights
 2851 28th St, San Francisco, 94110

Special, remodeled 3 level home with stunning views and an enchanting backyard, nestled on a tree lined block in Dolores Heights. Main level offers formal dining & living rooms, a full bathroom, laundry, oak in chef's kitchen with Sub-Zero fridge...

Price	\$ 2,299,000	3 Bedrooms	4 Bathrooms
Size	2550	1900 Year Built	Apartment Type

Propertybase
 Nina Foster
 1 Market St, San Francisco, 94105

propertybase[®] Joe Broker, jpa_of_commercial@propertybase.com

Property information	Transaction	Contact Information & Comments
1 Geary Office Suite 1 Geary Blvd. San Francisco 94110 	Property type: Office Size: 4000 sq ft Lease type: Full Service Building class: A APN/Parcel ID: 014-710-056 Size Available: 3000 Floors: -	\$ 4 \$ 48 Lessee: Dropbox TI rep: Hannah 2013-01-01 2015-01-01 24 Office Building which features security access with key card, Denzel access with key card, Caden Scott security access Close to future location of Spaulding Rehabilitation, Transportation Includes easy access to Routes 1 & 9...
2 Pacific Office Building 1 Pacific Ave. San Francisco 94115 	Property type: Office Size: 10000 sq ft Lease type: NNN Building class: B APN/Parcel ID: 014-710-056 Size Available: 9000 Floors: 8	\$ 3 \$ 36 Lessee: Inc.com TI rep: Luke Torres 2011-01-01 2015-01-01 48 Office Building which features office space with elevator, Benjamin Baker security access Close to future location of Spaulding Rehabilitation, Transportation Includes easy access to Routes 1 & 9...
3 Presidio Office Building 301 Presidio Ave. San Francisco 94115 	Property type: Office Size: 8000 sq ft Lease type: Full Service Building class: A APN/Parcel ID: 014-710-056 Size Available: 8000 Floors: 3	\$ 6 \$ 72 Lessee: Besson Law TI rep: Tim Zechner 2013-02-01 2016-02-01 12 Office Building which features office space with elevator, access with key card, security access Close to future location of Spaulding Rehabilitation, Transportation Includes easy access to Routes 1 & 9...
4 Union Square Offices 10 Union Square Ave. San Francisco 94110 	Property type: Office Size: 10000 sq ft Lot size: 1 sq ft Building class: C APN/Parcel ID: 014-710-056 Floors: 20 Units: 20	Price: \$ 4000000 Sale date: 2015-04-01 Price/GSF: \$ 400 Cap rate: 8 % Buyer: Emerson Company: Limited Tenant: Jack King Office Building which features office space with elevator, Robinson access with key card, Emerson security access Close to future location of Spaulding Rehabilitation, Transportation Includes easy access to Routes 1 & 9...

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The basics

Structure

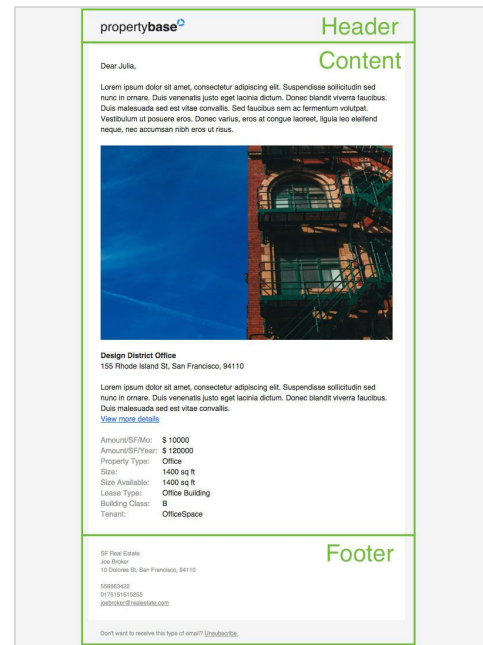
We provide both email and PDF templates that you can use out of the box with just some little customizations. Our PDF templates consist of a **logo** template with your company logo and a **content** template including header and footer. Our email templates consist of a separate **header**, **content** and **footer** template, and an additional **plaintext** template.

Email plaintext

Most likely your clients will see the html email, but if their email client does not support html emails, the plaintext will act as a “fallback”. It contains all the content of the html email but without styles, advanced layout or images. So if you change any fields in the html templates make sure to repeat these changes in the plaintext!

Commercial templates

Commercial templates work both for listings for sale and for lease. Based on the listing type field `pba_listingtype_c` the template automatically selects the right template component. We currently do not provide a residential template for listings for rent, but you easily can adjust the fields to your needs.



```
{% for listing in listings %}
  {% if listing.pba_listingtype_c == 'Sale' %}
    <!-- Sale template and relevant fields -->
  {% else %}
    <!-- Lease template and relevant fields -->
  {% endif %}
{% endfor %}
```

Before you get started

As stated earlier our templates are based on the Liquid templating language. To get an overview of the syntax and functionality we recommend to take a look at [the official documentation for designers](#).

Tip: If you customize your templates we recommend you to copy and paste the template code to your local editor. There you can use syntax highlighting, get a better overview and don't need to struggle with the small input field. After you finished your adjustments just copy and paste the code back into Salesforce.

The template object

In Propertybase the templates are modeled as custom objects. Navigate to the template object by clicking on the “+” tab on the far right. Then select “Templates”. You will see a list of all available templates. If you want to create a new template you will see the following screen:

The screenshot shows the 'New Template' form in Salesforce. The form is titled 'Template Edit' and 'New Template'. It has three buttons at the top: 'Save', 'Save & New', and 'Cancel'. The form is divided into two main sections: 'Information' and 'Template Content'. The 'Information' section includes fields for Template Name, Dev Name, Type, Description, Screenshot, Owner, Activity Type, Category, and Subcategory. The 'Template Content' section includes fields for Subject, HTML, Plain Text, CSS, and Media Items. The form has 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

Field	Value / Description
Template Name	Shown name of the template
Dev Name	Unique Name in the system
Type	--None-- Select for the template type
Description	Enter a description shown for the users
Screenshot	Here you can have a link to a thumbnail of the template
Owner	Nina Foster
Activity Type	Type which will be used for the tracked activity
Category	--None-- Categories can be defined if required
Subcategory	...
Subject	Enter the profiled subject here -> required for emails
HTML	Enter html code here
Plain Text	Enter plain text here
CSS	If you want to work with styles, you can define the CSS here.
Media Items	Number of media items which can be used for the template

Accessing and displaying fields of Salesforce objects

To get an idea of the available fields of an object such as Listing, Contact or User click on “Setup”. There you will find the section “Build” in the left sidebar. Open “Create” and choose “Objects”. You will find a list of all available objects, select your desired object and find out the [API name](#) of this field.

For example the API name of the price field of the listing object will be `pba__ListingPrice_pb__c` In order to access and display Salesforce fields in any template, all fields need to be lowercased. So `pba__ListingPrice_pb__c` becomes `pba__listingprice_pb__c`. To finally display the listing price of the first selected listing in the Send Wizard you have to use the following syntax:

```
{{ listing[0].pba__listingprice_pb__c }}  
100000
```

In order to display the listing price of multiple listings you need to loop through the array of selected listings. The syntax looks something like this:

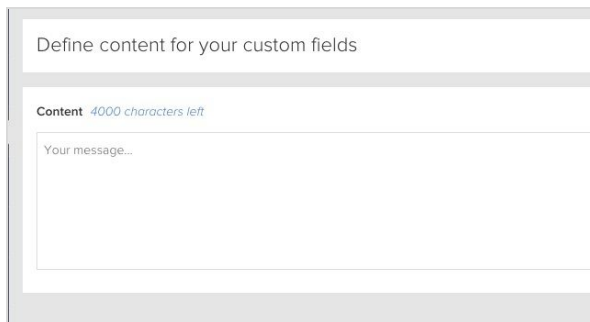
```
{% for listing in listings %}  
{{ listing.pba__listingprice_pb__c }}  
{% endfor %}  
100000  
250000  
600000
```

Note: You can define the number of possible listings for a template by adding your desired number to the “Media Items” input field within the “Template Content” settings.

Snippets

You want to add custom content to your templates? No problem, you can make use of snippets. Those allow the users to enter values and text within the templates during the writing process in the Send Wizard. Here is simple example and how it shows up in the Send Wizard:

```
{{SNIPPET.content | snippet:  
  "'type':'text','label':'Content','size':'2000','placeholder':'Your message...'" |  
  newline_to_br}}
```



The screenshot shows a window titled "Define content for your custom fields". Inside, there is a section labeled "Content" with a character count of "4000 characters left". Below this is a text input field with the placeholder text "Your message...".

Make them yours

Tip: If you have problems with previewing and sending out your template after customizations, please take a look at section “Common pitfalls”.

Customize email logo

In order to adjust the company logo used in all of the Email templates open the Email header template. Find the image element in the template shown below and replace the URL in the source attribute with the URL of your own logo. Make sure the image is a PNG with a transparent background for an optimal visual appearance. Adjust the width and height attributes to your needs. (The values should match the dimensions of your logo image.)

```

```

```

```

If you want to center your logo just set the align attribute in the email header to center:

```
<tr>  
  <td class="container-padding header" align="center" style="padding-left:24px;  
padding-right:24px;">  
    </td>  
</tr>
```

Note: You can add custom layout elements such as borders, custom sections or images, too. In the process it is important to assure that especially the email layout remains sound. Otherwise the display of the templates will be flawed and your customers will have a bad user experience. So if you are not really into HTML and CSS, we recommend a developer or web designer to assist you.

Customize pdf logo

In order to adjust the company logo used in all of the PDF templates open the PDF company logo template and change the image. Use the "style"-tag to add the dimensions (exact width and height) of your image.

```

```

```

```

You want to center your logo? Add the following highlighted code to your logo img:

```

```

Customize background color

In order to adjust the background color used in all of the email templates open the **Email header** template and change the image.

Find the following code fragment and change the value of all of the `bgcolor` attributes to your desired color. You may want to use bright and pastel shaded colors. Each template has to be adjusted separately!

```
<body style="margin:0; padding:0;" bgcolor="#f5f5f5" leftmargin="0" topmargin="0" marginwidth="0" marginheight="0"> <table border="0" width="100%" height="100%" cellpadding="0" cellspacing="0" bgcolor="#f5f5f5"> <tr> <td align="center" valign="top" bgcolor="#f5f5f5" style="background-color: #f5f5f5;">
```

```
<body style="margin:0; padding:0;" bgcolor="#ffffff" leftmargin="0" topmargin="0" marginwidth="0" marginheight="0"> <table border="0" width="100%" height="100%"
```

```
cellpadding="0" cellspacing="0" bgcolor="#ffffff"> <tr> <td align="center"
valign="top" bgcolor="#ffffff" style="background-color:#ffffff;">
```

Customize fields

Open the Email or PDF template in which want to update. Find the field you want to change and replace it with your desired field name in lowercase characters. You can also delete fields and add new fields. However, it is recommended to do a preview rendering to make sure the layout is not affected by any changes.

```
{{listing.price_unit__c}}
{% if listing.price_unit__c %}$ {{listing.price_unit__c}}{% else %}-{% endif %}
```

```
{{listing.my_field_name__c}}
{% if listing.my_field_name__c %}$ {{listing.my_field_name__c}}{% else %}-{% endif
%}
```

You want to do advanced calculations? No problem, see the last chapters about filters. Here is an advanced example that shows how to calculate the average listing price of all listings, capture it in a variable and output it in a custom format:

```
{% capture average_sold_price %}{% average listings, 'pba__listingprice_pb__c' %}{%
endcapture %}
{{ average_sold_price | money: "precision: 2" }}
$2,345.56
```

You want to show text based on the state of a checkbox? In Salesforce checkboxes can have three values: `null` (default, unchecked), `false` (unchecked) and `true` (checked).

```
{% if listings[0].pba_dachfields__kitchen__c % == true %} Yes {% elsif
listings[0].pba_dachfields__kitchen__c % == false %} No {% else %} No {% endif %}
```

Additional listing images

Propertybase already comes with a couple of templates to present your listings in the best light including:



Multiple Listing Recommendation with **1 image** per listing (Email/PDF)



Multiple Listing Recommendation with **1 image** per listing (Email/PDF)



Single Listing Recommendation with **3 images** (Email)



Single Listing Recommendation with **unlimited images** (PDF)



Window Card with **1 image** (PDF)



Window Card with **3 images** (PDF)

You want to show off even more images? Feel free to add additional images but ensure that the template structure remains intact. This can involve some trial and error. First locate the section that includes the image/images and copy & paste it above or below the original section. Then make sure to enter the correct number of images per listing in the **Media Items** setting on the template object and adjust the **image source** as follows:

```
{{ listings[0].media[0].file }} <!-- First image of a single listing template -->
{{ listings[0].media[1].file }} <!-- Second image of a single listing template ->
...
{{ listing.media[0].file }} <!-- First image of a multiple listing template -->
{{ listing.media[1].file }} <!-- Second image of a multiple listing template ->
...
```

Customize email footer

In order to do adjust the footer open the "Email footer" template and adjust the html and plaintext to your needs.

Html footer:

```
...
<table cellpadding="0" cellspacing="0" border="0" style="width: 100%;">
  <tr>
    <td>
      <hr style="height:1px;border:none;border-bottom:1px solid
#ededed;">
      <br></td>
    </tr>
    <tr>
      <td align="left" style="font-family:Helvetica, Arial,
sans-serif;font-size:11px;line-height:16px;color:#999;">
        {{user.companyname}}
        <br>
        {{user.name}}
        <br>
        {{user.street}}, {{user.city}}, {{user.postalcode}}
        <br>
        <br>
        {{user.phone}}
        <br>
        {{user.mobilephone}}
        <br>
        <a href="mailto:{{user.email}}"
style="color:#999">{{user.email}}</a>
        <br>
        <br>
      </td>
    </tr>
  </table>
</td>
</tr>
```

```

        <tr>
            <td class="container-padding footer-text" align="left"
style="font-family:Helvetica, Arial,
sans-serif;font-size:11px;line-height:16px;color:#999;padding-left:24px;padding-right:24px">
                <br>
                Don't want to receive this type of email?
                <a href="mailto:{{user.email}}?subject=Unsubscribe"
style="color:#999">Unsubscribe.</a>
                <br>
            <br></td>
        </tr>
    </table>
</td>
</tr>
</table>
</body>
</html>

```

Plaintext footer:

```

{{user.companyname}}
{{user.name}}
{{user.street}}, {{user.city}}, {{user.postalcode}}
{{user.phone}}
{{user.mobilephone}}
{{user.email}}

Don't want to receive this type of email?
<a href="mailto:{{user.email}}?subject=Unsubscribe">Unsubscribe.</a>

```

Customize pdf footer

Adjusting fields in the footer of PDF templates has to be done inside each template separately.

```
<div class="footer">
  <p>
    {{user.companyname}}
    <br />
    {{user.name}}
    <br />
    {{user.street}}, {{user.city}}, {{user.postalcode}}
    <br />
    {{user.phone}}
    <br />
    {{user.mobilephone}}
    <br />
    {{user.email}}
    <br />
  </p>
</div>
```

Common pitfalls

Missing if or endif statement.

```
{% if listing.pba__listingprice_pb__c %}...{% endif %}
```

Missing object reference.

```
{{ pba__listingprice_pb__c }}
{{ listing.pba__listingprice_pb__c }}
```

Wrong field name or field name not in lowercase.

```
{{ listing.pba__ListingPricepb__c }}
{{ listing.pba__listingprice_pb__c }}
```

Missing braces or wrong syntax. Please note that double curly braces are used for output whereas curly braces and % are used, amongst other things for control flow statements such as if or for and defining variables.

```
{{ listing.pba__listingprice_pb__c }}
{% if listing.pba__listingprice_pb__c %}
    ...
{% endif %}
{% assign currency_precision = 2 %}
{% capture number_active_listings %}{{ number_active_listings | plus:1.0 }}{%
endcapture %}
```

Format currency

Note: This section covers the new approach to format currencies! [See bottom for the old approach based on the locale.](#)

Inside each email and PDF listing template you will find a couple of configuration variables. These variables format currencies for the whole template based on the `currencyIsoCode` of each listing. The template automatically detects Euro, Pound and Dollar. You can of course adjust the formatting to your needs and region.

```
{% assign currency_precision = 2 %}
{% assign currency = listings[0].currencyisocode %} // listing for multiple listings
{% if currency == 'EUR'%}
    {% assign currency_unit = '€' %}
    {% assign currency_separator = ',' %}
    {% assign currency_delimiter = '.' %}
    {% assign currency_format = '%n %u' %}
{% elsif currency == 'GBP' %}
    {% assign currency_unit = '£' %}
    {% assign currency_separator = '.' %}
    {% assign currency_delimiter = ',' %}
    {% assign currency_format = '%u%n' %}
```

```
{% else %}
    {% assign currency_unit = '$' %}
    {% assign currency_separator = '.' %}
    {% assign currency_delimiter = ',' %}
    {% assign currency_format = '%u%n' %}
{% endif %}

{{listing.pba__listingprice_pb__c | money: "precision: currency_precision, unit:
currency_unit, separator: currency_separator, delimiter: currency_delimiter, format:
currency_format" }}
```

1.234.567,89 €
£1,234,567.89
\$1,234,567.89

Important: Be sure to adjust the currency settings of each template in your Org. In some templates the currency variable block appears more than once, make sure to adapt this block, too.

Format date

Similar to the currency formatting you will find a configuration variable for dates. If you do not have a variable yet you always can add the parameters inline.

Important: Be sure to adjust the date settings of each template in your Org.

```
{% assign date_format = '%D' %}  
{{ 'now' | date: date_format }}  
04/22/16
```

```
{% assign date_format = '%d/%m/%y' %}  
{{ 'now' | date: date_format }}  
22/04/16
```

```
{% assign date_format = '%d.%m.%y' %}  
{{ 'now' | date: date_format }}  
22.04.16
```

```
{% assign date_format = '%a, %b %d, %Y' %}  
{{ 'now' | date: date_format }}  
Wed, Feb 20, 2016
```

Available filters

Supported Liquid filters

This section only covers a small subset of available filters. To see all supported Liquid-based filters and tags check out: <https://github.com/Shopify/liquid/wiki/Liquid-for-Designers>

sort

Sort an array depending on a field.

```
{% assign sorted_listings = listings | sort: 'name' %}
{% for listing in sorted_listings %}
  {{ listing.pba__address_pb__c }}
{% endfor %}
Alamo Square 125
Bakery Street 34
Mission Street 200
```

Additional custom filters

See <http://api.rubyonrails.org/classes/ActionView/Helpers/NumberHelper.html> for reference (the syntax is different tough).

money

Format prices.

```
{{ 100000 | money: "precision: 2, unit: 'Ksh', separator: '.', delimiter: ',',
format: '%n %u'" }}
```

100,000.00 Ksh

percentage

Format a number as a percentage.

```
{{ 1234567 | percentage: "precision: 2" }}
```

123,46%

human

Format a number in a human readable way.

```
{{ 1234567 | human: "precision: 1, separator: ',', significant: false" }}  
1,2 Million
```

with_delimiter

Delimit a number to thousands.

```
{{ 3000000 | with_delimiter }}  
3,000,000
```

with_precision

Define the precision of a number.

```
{{ 123456789 | "with_precision: 2" }}  
12345.68
```

pluralize

Return the second word if the input is not 1, otherwise return the first word.

```
{{ 3 | pluralize: 'item', 'items' }}  
items
```

Additional custom tags

average

Calculates the average of a field in a collection.

```
{% average listings, 'pba__listingprice_pb__c' %}
```

count

Counts a collection.

```
{% count listings %}
```

max

Returns the maximum value of a field in a collection.

```
{% max listings, 'pba__listingprice_pb__c' %}
```

median

Calculates the median of a field in a collection.

```
{% median listings, 'pba__listingprice_pb__c' %}
```

min

Returns the minimum value of a field in a collection.

```
{% min listings, 'pba__listingprice_pb__c' %}
```

stdev

Calculates the standard deviation of a field in a collection.

```
{% stdev listings, 'pba__listingprice_pb__c' %}
```

sum

Calculates the sum of a field in a collection.

```
{% sum listings, 'pba__listingprice_pb__c' %}
```

var

Calculates the variance of a field in a collection.

```
{% var listings, 'pba__listingprice_pb__c' %}
```

Individual templates

Comparable market analysis (CMA)

This template does a lot of calculations in the background to provide you with an overview over your listings. If the outcome has missing fields or shows you a red bar reassure the following points:

- Out of the box the CMA template **only supports listings for sale** with a `pba__status__c` of “Active” and “Closed” (commercial ORGs) or “Sold” (residential ORGs). Feel free to customize the template for other listing states.
- Make sure all of your listings provide the field values that are needed for the CMA template. Otherwise the output may be distorted.

Deprecated settings

Customize locale (aka format currencies)

Important: Formatting currencies via adjusting the locale is deprecated. The current set of templates relies on a per template setting that is more fine-grained.

The default locale of each template is 'en-US' but you can customize it to your location. Our template engine supports the following locales ([see i18n](#)):

```
af, ar, az, be, bg, bn, bs, ca, cs, cy, da, de, de-AT, de-CH, el, en, en-AU, en-CA,
en-GB, en-IE, en-IN, en-NZ, en-US, en-ZA, eo, es, es-419, es-AR, es-CL, es-CO,
es-CR, es-EC, es-MX, es-PA, es-PE, es-US, es-VE, et, eu, fa, fi, fr, fr-CA, fr-CH,
gl, he, hi, hi-IN, hr, hu, id, is, it, it-CH, ja, km, kn, ko, lb, lo, lt, lv, mk,
mn, mr-IN, ms, nb, ne, nl, nn, or, pa, pl, pt, pt-BR, rm, ro, ru, sk, sl, sr, sv,
sw, ta, th, tl, tr, tt, ug, uk, ur, uz, vi, wo, zh-CN, zh-HK, zh-TW, zh-YUE
```

For example if you are situated in the UK or in Germany you have to adjust the locale as follows:

```
{% assign locale = 'en-GB' %}
{% if listing.pba__listingprice_pb__c %}{{ listing.pba__listingprice_pb__c | money:
"precision: 2, locale: locale" }}{% else %} - {% endif %}
£1,234,567.89

{% assign locale = 'de' %}
{% if listing.pba__listingprice_pb__c %}{{ listing.pba__listingprice_pb__c | money:
"precision: 2, locale: locale" }}{% else %} - {% endif %}
1.234.567,89 €
```

If the local setting does not work for you or the formatting is insufficient, you can always hard-code your preferred money formatting for each field. See the `money` filter.