

How to Create and Use Custom Values

Modified on Tue, 06 Dec 2022 at 11:19 AM

The screenshot displays a CRM automation interface. On the left, a panel titled 'What actions should we perform?' shows a dropdown menu with 'Contact Tag' selected. Below it, a 'Test' button is visible. On the right, a larger panel titled 'What action should we perform?' shows the configuration for a 'Send Email' action. The 'From' field is set to 'noreply@thedemoaccount.com'. The 'To' field contains the merge field '[[contact.email]]'. The 'Subject' field is 'This is a test!'. The 'Message' field contains the text 'Hey {{contact.first_name}}!', 'Check out these awesome custom values!', and 'Thanks, Me'. A rich text editor toolbar is visible above the message field.

Custom Values, or Merge Fields, are values you can put into a template that will auto-populate when generating communication with your contacts. They are a great way to save time and maximize your system by automating information so you can send out customized communication more quickly. For example, an email templated can say "Hey {{ contact.name }}" and it will auto-populate the name of the contact so you can send a personal email to a group of contacts or through an ongoing campaign that leads are consistently being added to.

Here are some common examples of custom values you may use in your system:

- Contact > Full name: {{ contact.name }}
- Contact > First name: {{ contact.first_name }}
- Contact > Last name: {{ contact.last_name }}
- Contact > Email: {{ contact.email }}
- Contact > Phone: {{ contact.phone }}
- Contact > Company name: {{ contact.company_name }}

Some custom values are by default built into your system, for most commonly used things like name, email, phone number, etc. These standard custom values are useful for common merge fields, such as a greeting/intro to an email like `""Hey {{ contact.name }}`". To view all the custom values in your system, navigate to any

You can also create your own custom values specifically for your business/system. These can be useful if you want to set up automation by pre-setting defined values. (In the example below, the "Custom Email" will always populate `test@demoaccount`, so you won't have to type it out every time.)

Step 1: Creating Custom Values

- You can create your own custom values by navigating to Settings > Custom Values
- Click +Add Custom Value to create a new one.
- You can click the trashcan icon to delete an existing one or the pencil icon to edit.
- These will be pre-set custom values with a defined value.

Step 2: Using Custom Values. You can add a standard or self-created Custom Value into an email or SMS template, trigger, campaign, and more.

- Navigate to the communication you wish to customize.
 - In the video example, we use a trigger setup to send a custom email.
 - In the screenshot example below, we are sending a bulk email from the Contacts section.
- Choose "Custom Values" and the dropdown menu will appear (with sub-menus).

Send Email

Send email to following contacts

TC FL TT JT TP KT DP TT

Email Templates

From Name From email

Email Subject

B I [List Icons] A Verdana

11pt Formats Custom Values Trigger Links

0 WORDS POWERED BY TINY

Attach Files

☒ Send all at once ☐ Send all at schedule time ☐ Send in drip mode

Description

Enter a description for the action

Cancel Send Email

- Click the value you wish to use, and it will be added to the body of the message.

Send Email

Send email to following contacts

TC FL TT JT TP KT DP TT TP 10 more contacts...

Email Templates

Help Desk demo@testaccount.com

This is a test!

B I [List Icons] A Verdana

11pt Formats First Name Trigger Links

Hey {{contact.first_name}},

Hope you're having a great day. This is a test.

From, Me

14 WORDS POWERED BY TINY

Attach Files

☒ Send all at once ☐ Send all at schedule time ☐ Send in drip mode

Description

Enter a description for the action (to be shown in tracking report)

Cancel Send Email

- Now, the email intro essentially says, "Hey _____," and the system will automatically pull the first name of each contact into the email when it's sent out.

NOTE: the custom values used in this example contain a space between the symbols { }, but in actual usage, there will be no space between the symbols and text.