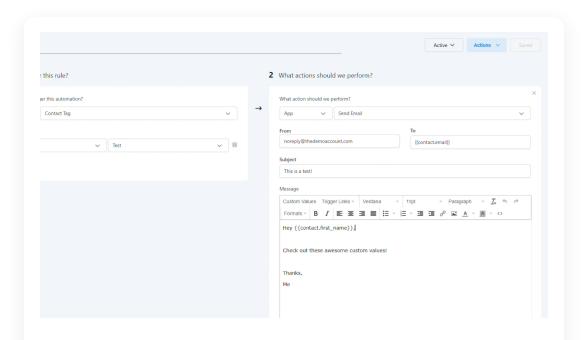
How to Create and Use Custom Values

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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

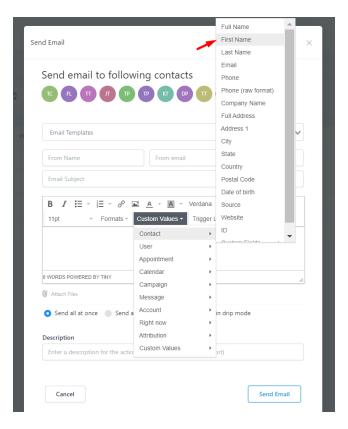
You can also create your own custom values specifically for your business/system. These can be useful if you want to set up automation by pre-setting defined values. (In the example below, the "Custom Email" will always populate test@demoaccount, so you won't have to type it out every time.)

Step 1: Creating Custom Values

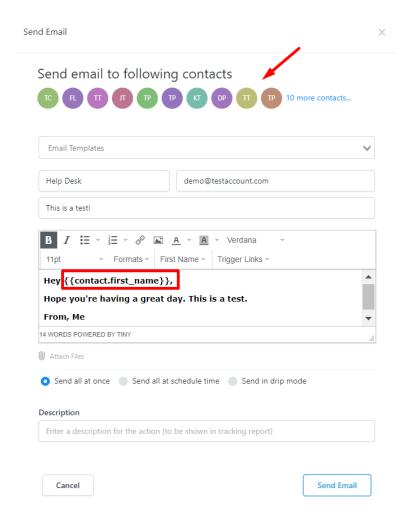
- You can create your own custom values by navigating to Settings > Custom Values
- Click +Add Custom Value to create a new one.
- You can click the trashcan icon to delete an existing one or the pencil icon to edit.
- These will be pre-set custom values with a defined value.

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).



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



 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.