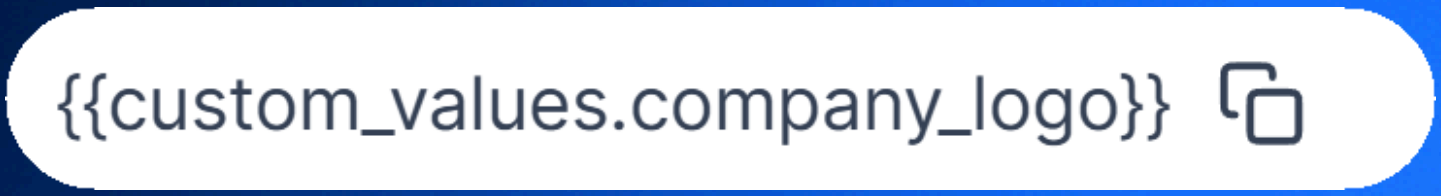
REFERENCE GUIDE

Custom Values

Store It Once, Use It Everywhere



The Custom Values Page

What It Is

Custom Values are account-wide pieces of text, like a phone number or booking link, that you save once and reuse anywhere. Search for Custom Values to see every value you have.

How It Works For Your Business

- Search for Custom Values to open the list.
- Each row shows a name, the value it holds, and a merge field key you can point to.
- Use the search box above the list and type part of a name to narrow it down.
- The blue + Add Custom Value button creates a new one.
- Click the three dots on a row to see Edit Custom Value and Delete Custom Value.

The Custom Values Page - Tips & Guidelines

Tips

- Use it for info that is the same for every customer.
- Good fits are phone numbers, links, office hours, and promo text.
- Scan the list before making anything new.
- Look for the closest match if a label differs in your account.

DO

- Store shared info once
- Search before you create
- Check the three-dot menu
- Learn what is already saved

DON'T

- Retype shared info everywhere
- Make a duplicate by accident
- Click delete without looking
- Guess where a value is used

Creating and Editing Values

What It Is

Creating a value takes a name and the text to insert. Editing it later updates every message, page, and automation that points to it, so you never hunt for old copies.

How It Works For Your Business

- Click Add custom value to open a small form.
- Type a plain Name, like Booking Link, that you will recognize in lists and pickers.
- Type or paste the Value, which is the exact text that gets inserted.
- Choose a folder if the form offers one, then click Save.
- To change it later, click the three dots, choose Edit Custom Value, update the Value, and save.

Creating and Editing Values - Tips & Guidelines

Tips

- Pick a name future you understands in two seconds.
- Your software builds the merge field key from the name you type.
- Edit the value, not the name, when only the words change.
- Test one message after a big edit to see the new text.

DO

- Use clear, plain names
- Paste links carefully
- Edit to update everywhere
- Save after every change

DON'T

- Use vague names like Stuff
- Rename a value that is in use
- Leave the Value box empty
- Delete instead of editing

Organizing with Folders

What It Is

A folder is a labeled drawer that groups related values, so a long list stays easy to scan. Good folders also cut down on duplicates and help you find the right value when you build.

How It Works For Your Business

- Click Add folder on the Custom Values page, then name it.
- Choose a folder when you create a value if the form offers the choice.
- For an existing value, click the three dots, choose Edit Custom Value, pick the folder, and save.
- Moving a value keeps its key, so everything using it keeps working.
- Open the folder to confirm the value landed where you meant.

Organizing with Folders - Tips & Guidelines

Tips

- Name folders for what is inside, like Contact Info or Links.
- Group values by how you use them.
- Check the right folder before making a new value.
- Look in the merge field picker to see how your values are grouped.

DO

- Use short, clear folder names
- Sort a few values at a time
- Reuse what already exists
- Review the list now and then

DON'T

- Name a folder Misc
- Make a copy of an old value
- Worry that moving breaks things
- Let the list grow unsorted

Inserting in Emails and Texts

What It Is

You insert a custom value with the merge field picker, so the code drops into your message. When the message is sent, your software swaps the code for the real words.

How It Works For Your Business

- Open Conversations, click in the message box, and click the merge field icon in the toolbar.
- Look for Custom Values in the list and pick one, such as Booking Link.
- Try typing a slash and part of the name to search your values as you type.
- Search for Email Builder, click a text block, open the picker, and choose a value.
- Look for the same merge field option next to the subject line and from fields.

Inserting in Emails and Texts - Tips & Guidelines

Tips

- Leave a space on each side of the code.
- Seeing the code in the editor is normal before sending.
- Send a test email to yourself and check the real value shows.
- If a value is blank, check its name and value in Custom Values.

DO

- Insert from the picker
- Send a test every time
- Use the slash shortcut
- Read the message before sending

DON'T

- Type codes by hand
- Paste an old link
- Skip the test email
- Cram the code against words

Pages and Websites

What It Is

The same custom values work in funnel and website pages. You can put one in a text element, a button link, or an image address, and the live page shows the current value.

How It Works For Your Business

- Search for Funnels and open the page you want to edit.
- Click a text element and look for the merge field option to insert a custom value.
- Look for the same option when setting a button link or an image address.
- Publish the page and open the live version to see the value in place.
- Change the value in Custom Values, then reload the live page to see it update.

Pages and Websites - Tips & Guidelines

Tips

- Use one value for a link used on many pages.
- Check the live page, not just the editor.
- Reload after you change a value, since pages can be saved by your browser.
- Put phone numbers and hours in values so footers stay current.

DO

- Use values for links
- Publish before you check
- Test the button link
- Reload the live page

DON'T

- Retype links on each page
- Judge only in the editor
- Delete a value a page uses
- Forget to publish changes

Workflows and Update Action

What It Is

Workflow email and text actions can use custom values too. A special Update Custom Value action can also change a value for you when something happens in your account.

How It Works For Your Business

- Open a workflow and add or open an email or SMS action.
- Type a slash in the message box to search your custom values.
- Notice the chip colors: blue means available, yellow means it exists but is unavailable, and red means missing.
- Add the Update Custom Value action, pick the value, and set the new text.
- Run a test of the workflow to confirm the message and the new value.

Workflows and Update Action - Tips & Guidelines

Tips

- Treat a red chip as a sign to fix a name or create the value.
- Treat a yellow chip as a sign to check where the workflow runs.
- Run a test before turning a workflow on.
- Remember an update changes the value for the whole account.

DO

- Read the chip colors
- Test before publishing
- Name values clearly
- Check what uses a value

DON'T

- Ignore red chips
- Update a value without a plan
- Skip a test run
- Delete values workflows use

Values vs Custom Fields

What It Is

Custom Values hold one answer for the whole account, such as your phone number. Custom Fields hold a different answer for each contact, such as a birthday. Picking the right one saves rework.

How It Works For Your Business

- Custom Values holds one value for your whole account.
- Custom Fields holds a separate value for every contact.
- Custom value codes start with custom_values and contact codes start with contact.
- Use a custom value for your business phone number or booking link.
- Use a custom field for a customer's birthday or favorite product.

Values vs Custom Fields - Tips & Guidelines

Tips

- Ask: is it the same for everyone or different per person?
- Use the merge field picker to avoid mixing up the two.
- Look at the code in curly braces to tell which type it is.
- If you keep editing a value per person, it should be a field.

DO

- Choose by who it applies to
- Use the picker
- Read the code prefix
- Keep each type separate

DON'T

- Store birthdays as values
- Store your phone as a field
- Mix up the two codes
- Guess without checking

Built-In Merge Fields

What It Is

Your software already includes many merge fields you do not have to create. The picker groups them, and they pull real details from your account, your users, and your contacts.

How It Works For Your Business

- Open the merge field picker in any editor to see the groups.
- Groups include Contact, User, Appointment, Calendar, Account, Right Now date and time, and Attribution.
- Account fields hold details such as business name, phone, and logo address.
- Use user fields in an email signature so each sender's details show.
- Use appointment and calendar fields in a reminder so it fills in time and details.

Built-In Merge Fields - Tips & Guidelines

Tips

- Use built-in fields before making a new custom value.
- Use custom values for things the built-in list does not cover.
- Test reminders with a real booking to see the details fill in.
- Names of groups can differ slightly, so look for the closest match.

DO

- Check built-in fields first
- Use user fields in signatures
- Test with real data
- Use custom values for gaps

DON'T

- Rebuild what already exists
- Hard code a name
- Skip testing
- Assume every field has data

Dashboards, Documents, Posts

What It Is

Custom values also work in a few places beyond messages. You can use them in dashboard text, in document fields, and in social post drafts, so those stay current too.

How It Works For Your Business

- In dashboard edit mode, look for the curly brace button on text, title, and embed elements.
- Choose from Location, User, or custom values, then save to see the resolved text.
- In the Documents and Contracts editor, link a custom value to a text or date field.
- In the Social Planner post composer, insert a custom value into a draft.
- Update the value once, then reopen each place to confirm the change.

Dashboards, Documents, Posts – Tips & Guidelines

Tips

- A missing value can leave a blank, so check each value is filled in.
- Use values in widgets and text so one edit updates every view.
- Reopen documents and posts after a change to confirm.
- Look in each editor for the merge field option, since layouts differ.

DO

- Check for blanks after saving
- Reuse the same value
- Reopen to confirm
- Keep values filled in

DON'T

- Leave a value empty
- Delete values in use
- Assume old drafts update
- Skip a final check

Key Terms Glossary

Custom value

Saved text your whole account can reuse.

Merge field

A code that your software swaps for real info.

Merge field key

The short code in curly braces that points to a value.

Placeholder

The code sitting in your message before it sends.

Folder

A labeled drawer that groups related values.

Merge field picker

The list in an editor where you choose a value.

Slash shortcut

Type a slash to search values as you type.

Custom field

A value stored separately for each contact.

Update Custom Value

A workflow action that changes a value for you.

Chip

A colored tag showing a value is available or missing.

Test email

A copy sent to yourself to check real values.

Account fields

Built-in fields with your business name, phone, and logo.

Getting Help

Your software changes over time, so buttons and menus may move or have new names. If something looks different from this guide, check the in-app help for Custom Values or look for the closest matching option.