Merge fields and prompts

The details a sequence fills in automatically for each contact, and the prompts a rep must answer before it can start.

A sequence template is written once and sent to many people. Two kinds of double-brace token make the copy personal.

Merge fields

A merge field is filled in from the CRM when a rep starts the sequence for a contact. Insert one with the chips under the editor, or type it. These are the fields available:

Merge field	Filled with
{{contact.first_name}}	The contact's first name
{{contact.last_name}}	The contact's last name
{{contact.full_name}}	First and last name together
{{contact.email}}	The contact's email address
{{contact.job_title}}	The contact's job title
{{company.name}}	The company the contact belongs to
{{tribe.name}}	The name of the tribe starting the sequence
{{rep.first_name}}	The first name of the rep sending it
{{rep.last_name}}	The rep's last name
{{rep.full_name}}	The rep's full name
{{rep.email}}	The rep's email address

The rep is the team member who owns the contact in that tribe. If nobody is assigned, the rep fields are left blank and are shown to the rep as something to fill in, so a message never goes out with a hole in it.

Prompts

Anything else in double braces is a prompt: a note to the rep about what to write for this particular contact. For example: **I noticed {{specific trigger / observation}} and it made me wonder about {{hypothesis}}.** When the rep starts the sequence, every prompt is highlighted and the sequence cannot start until each one has been replaced with real words.

> **A MERGE FIELD WITH NO VALUE BECOMES A PROMPT**
> If the CRM has no value for a merge field - a contact with an email address but no name is the usual case - the field is left in braces and listed as something to fill in, exactly like a prompt. That is deliberate: it stops "Hi ," going out. Fix it by adding the missing detail to the contact record, or by writing the name into the step for that contact.

Writing good prompts

- Name the thing you want, not the field: {{the specific opening you saw}} beats {{trigger}}.
- Keep prompts to facts the rep can actually know. A prompt nobody can answer stalls every start.
- Put the prompt where the sentence needs it, so the rep sees the context while filling it.