

# MailerLite Custom Fields Guide

## Overview

When a user completes the archetype assessment, their results are automatically sent to MailerLite with **10 personalized custom fields**. These fields can be used in your email templates to create highly personalized content.

## How It Works

### Step 1: User Completes Assessment

When a user finishes the 60-question assessment, the app:

1. Calculates their archetype scores
2. Identifies their dominant archetype and top 3 archetypes
3. Sends this data to MailerLite via API
4. **Automatically creates custom fields** in MailerLite (first time only)
5. Adds the user to your MailerLite group (ID: 176508406386918528)

### Step 2: Custom Fields Are Created

MailerLite automatically creates these fields when it receives the first submission:

Field Name	Description	Example Value
name	User's full name	"John Doe"
archetype	Dominant archetype	"The Sage"
archetype_percent	Percentage of dominant archetype	"32"
test_date	Date test was completed	"1/14/2026"
archetype_1	1st place archetype	"The Sage"
archetype_1_percent	1st place percentage	"32"
archetype_2	2nd place archetype	"The Visionary"
archetype_2_percent	2nd place percentage	"24"
archetype_3	3rd place archetype	"The Builder"
archetype_3_percent	3rd place percentage	"18"

## Step 3: Use Fields in Email Templates

You can now use these fields in any MailerLite email template or automation.



## Using Custom Fields in MailerLite

### Syntax

MailerLite uses curly braces with a dollar sign:

```
{$field_name}
```

### Examples

#### 1. Personalized Greeting

```
<p>Hi {$name}</p>
```

**Output:** "Hi John Doe,"

#### 2. Show Dominant Archetype

```
<h2>Your Dominant Archetype: {$archetype}</h2>
<p>With {$archetype_percent}% alignment</p>
```

**Output:**

- "Your Dominant Archetype: The Sage"
- "With 32% alignment"

#### 3. Display All Top 3 Archetypes

```
<h3>Your Top 3 Archetypes:</h3>
<ul>
  <li>1st: {$archetype_1} ({$archetype_1_percent}%)</li>
  <li>2nd: {$archetype_2} ({$archetype_2_percent}%)</li>
  <li>3rd: {$archetype_3} ({$archetype_3_percent}%)</li>
</ul>
```

**Output:**

- 1st: The Sage (32%)
- 2nd: The Visionary (24%)
- 3rd: The Builder (18%)

#### 4. Test Completion Date

```
<p>You completed this assessment on {$test_date}</p>
```

**Output:** "You completed this assessment on 1/14/2026"



## Advanced Usage: Conditional Content

MailerLite allows you to show different content based on custom field values.

### Example: Archetype-Specific Content

You can create different content blocks for each archetype:

```
<!-- For The Sage -->
{$if archetype is "The Sage"}
<h3>For The Sage</h3>
<p>Your analytical mind is your greatest asset. Focus on:</p>
<ul>
  <li>Sharing your knowledge through teaching</li>
  <li>Seeking truth in all business decisions</li>
  <li>Building systems for continuous learning</li>
</ul>
{$endif}

<!-- For The Visionary -->
{$if archetype is "The Visionary"}
<h3>For The Visionary</h3>
<p>Your ability to see the future sets you apart. Focus on:</p>
<ul>
  <li>Communicating your vision clearly</li>
  <li>Building teams to execute your ideas</li>
  <li>Balancing innovation with practicality</li>
</ul>
{$endif}

<!-- Add blocks for all 12 archetypes -->
```

### Example: Percentage-Based Content

```
{$if archetype_percent >= 40}
<p>You have a <strong>very strong</strong> alignment with {$archetype}!</p>
{$else}
<p>You have a <strong>moderate</strong> alignment with {$archetype}.</p>
<p>This suggests you may blend multiple archetypes in your approach.</p>
{$endif}
```



## Step-by-Step: Creating a Personalized Email

### Option 1: Using the Web Editor

#### 1. Go to MailerLite Dashboard

- Navigate to **Campaigns** → **Email**
- Click **Create Campaign**

#### 2. Choose Template

- Select a template or start from scratch
- Click **Edit**

#### 3. Add Personalization

- Click where you want to add a custom field

- Type `{$` and you'll see a dropdown of available fields
- Select the field you want (e.g.,  `{$name} , {$archetype}` )

#### 4. Preview

- Click **Preview** to see how it looks with sample data
- MailerLite will show you what real subscribers will see

#### 5. Save & Use

- Save your template
- Use it in your automation or send as a campaign

## Option 2: Using HTML Templates

If you're comfortable with HTML:

#### 1. Create HTML File

```
```html
```

Hi {\$name}! 

Your Dominant Archetype

**{\$archetype}**

{\$archetype\_percent}%

### Your Complete Top 3:

1. {\$archetype\_1} - {\$archetype\_1\_percent}%
2. {\$archetype\_2} - {\$archetype\_2\_percent}%
3. {\$archetype\_3} - {\$archetype\_3\_percent}%

Test completed on {\$test\_date}

```

#### 1. Import to MailerLite

- Go to **Campaigns** → **Email**
- Click **Create Campaign**
- Choose **Custom HTML**
- Paste your HTML code
- Save



## Setting Up Automation

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### Create an Automated Welcome Sequence

#### 1. Create Automation Workflow

- Go to **Automations** in MailerLite
- Click **Create Workflow**
- Name it: "Business Archetypes Welcome Sequence"

#### 2. Set Trigger

- **Trigger:** "Subscriber joins a group"
- **Select Group:** "archetypen-test" (ID: 176508406386918528)
- This means: automation starts immediately when someone completes the assessment

#### 3. Add Email 1: Immediate Results (Delay: 0 minutes)

- Subject: Hi {\$name}, Your Archetype is {\$archetype}! 🎉
- Use the email template from `mailerlite_templates/email1_archetype_result.html`
- This email shows their complete results

#### 4. Add Email 2: Archetype Guidance (Delay: 3 days)

- Subject: {\$name}, Understanding Your {\$archetype} Type
- Use the email template from `mailerlite_templates/email2_archetype_guidance.html`
- Provides deeper insights and introduces Shadow Work

#### 5. Add Email 3: Business Sovereignty (Delay: 6 days total)

- Subject: How {\$archetype} Can Build Business Sovereignty
- Use the email template from `mailerlite_templates/email3_business_sovereignty.html`
- Connects their archetypes to business strategy

#### 6. Activate Workflow

- Review all emails
- Click **Activate**
- Done! 🎉

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## Testing

### Test the Integration

#### 1. Complete the Assessment

- Go to your deployed app
- Complete the 60 questions
- Use a test email address

#### 2. Check MailerLite

- Go to **Subscribers**
- Find your test email
- Click on it to view profile
- You should see all 10 custom fields populated

### 3. Test Automation

- If automation is active, you should receive:

- Email 1: Immediately
- Email 2: After 3 days
- Email 3: After 6 days total

### 4. Preview Variables

- In email editor, click **Preview**
  - MailerLite will show how the email looks with your data
- 



## Viewing Custom Fields in MailerLite

### Where to Find Them

#### 1. Individual Subscriber View

- Go to **Subscribers**
- Click on any subscriber who completed the test
- Scroll to **Custom Fields** section
- You'll see all 10 fields with their values

#### 2. Segment Builder

- Go to **Subscribers** → **Segments**
- Click **Create Segment**
- You can now filter by any custom field
- Example: "Show all subscribers where `archetype` is `The Sage`"

#### 3. Email Template Editor

- When editing any email
  - Type `{$` and all custom fields appear in dropdown
  - Select any field to insert it
- 



## Best Practices

### 1. Always Use Fallback Values

In case a field is empty:

```
<p>Hi {$name|default:"there"}</p>
```

If `name` is empty, it will show "Hi there,"

### 2. Test Before Sending

- Always preview emails with real subscriber data
- Send test emails to yourself first
- Check that all variables are displaying correctly

### 3. Segment Your Audience

Create segments for each archetype:

- "Sages" - where archetype is "The Sage"
- "Visionaries" - where archetype is "The Visionary"
- Send archetype-specific content to each segment

### 4. Use Conditional Content

- Show different CTAs based on archetype
- Adjust messaging based on percentage scores
- Create more relevant content for each subscriber

### 5. Track Engagement

- Monitor which archetypes have highest open rates
  - See which segments convert best
  - Use this data to refine your messaging
- 



## Troubleshooting

### Custom Fields Not Showing?

**Solution:** Fields are created when the first user completes the test.

- Complete the test once with any email
- Check MailerLite → Subscribers → View that subscriber
- Fields should now be visible

### Variables Showing as {\$name} in Email?

**Solution:** Preview mode issue.

- In email editor, click **Preview**
- Select a real subscriber from dropdown
- Variables should now show actual values
- In sent emails, variables are always replaced

### Automation Not Triggering?

**Solution:** Check automation settings.

- Go to **Automations**
  - Verify workflow is **Active** (not Draft)
  - Check trigger is "Subscriber joins group"
  - Verify correct Group ID: 176508406386918528
- 



## Resources

### Your Email Templates

Pre-built templates ready to use:

- mailerlite\_templates/email1\_archetype\_result.html
- mailerlite\_templates/email2\_archetype\_guidance.html
- mailerlite\_templates/email3\_business\_sovereignty.html

## MailerLite Documentation

- [Personalization Tags](https://www.mailerlite.com/help/how-to-use-personalization-tags) (<https://www.mailerlite.com/help/how-to-use-personalization-tags>)
- [Conditional Content](https://www.mailerlite.com/help/conditional-content) (<https://www.mailerlite.com/help/conditional-content>)
- [Automation Workflows](https://www.mailerlite.com/help/automation-workflows) (<https://www.mailerlite.com/help/automation-workflows>)

## API Integration

The integration code is in:

- `/api/mailerlite.js` - Serverless function that sends data
  - `js/app.js` - Frontend code that calls the API
- 

## Quick Checklist

- [ ] Complete test assessment once to create custom fields
  - [ ] Import the 3 email templates to MailerLite
  - [ ] Create automation workflow with group trigger
  - [ ] Add all 3 emails to workflow with appropriate delays
  - [ ] Test with your own email address
  - [ ] Verify custom fields appear in subscriber profile
  - [ ] Verify emails use correct variables
  - [ ] Activate automation
  - [ ] Monitor first real submissions
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Your custom fields are automatically available after the first user completes the assessment. No manual setup required in MailerLite - the API creates them automatically! ✨