

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

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! 🎉



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

Your custom fields are automatically available after the first user completes the assessment. No manual setup required in MailerLite - the API creates them automatically! ✨