



MARKETING

Merge Tags Reference

Complete reference for personalization placeholders in subject lines and email bodies.

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On this page

- [Syntax](#)
- [Contact Tags](#)
- [Agency / Sender Tags](#)
- [Where Merge Tags Work](#)
- [Fallback for Missing Data](#)
- [Custom Field Merge Tags](#)

Merge tags are placeholders you put in email subject lines and bodies that get replaced with each recipient's actual data at send time. They're what makes "Hi {{first_name}}," become "Hi Sarah," in Sarah's inbox.

Syntax

Merge tags use double curly braces around the field name: `{{first_name}}`. They're case-sensitive and must match a known tag exactly — typos render as literal text in the sent email.

Contact Tags

- `{{first_name}}` — recipient's first name
- `{{last_name}}` — recipient's last name
- `{{full_name}}` — first + last combined (empty if both are missing)
- `{{email}}` — recipient's email address

Agency / Sender Tags

- `{{company_name}}` — your agency name (from Settings)
- `{{mailing_address}}` — your agency mailing address (from Settings)
- `{{unsubscribe_url}}` — personalized unsubscribe link for this recipient (**required by law** to appear in every marketing email — Marketing injects it into your default footer automatically, but if you build a custom footer, include this tag)

Where Merge Tags Work

- **Subject line** — yes
- **Preview text** — yes
- **Email body** (drag-and-drop editor) — yes, any text block
- **Canva-imported HTML** — yes, type tags into Canva text frames before exporting

- **Landing page form thank-you messages** — yes
- **Image alt text** — yes
- **Button labels** — yes

Fallback for Missing Data

If a recipient is missing a value (e.g., no `first_name` on file), the tag renders as an empty string — not a literal `{{first_name}}`. Plan your copy accordingly:

- Bad: `Hi {{first_name}}`, → "Hi ," for contacts with no first name
- Better: `Hi {{first_name}}, hope you're well!` → still reads OK as "Hi , hope you're well!" but ugly
- Best: `Hi there!` (no tag) OR build a segment that excludes contacts without a `first_name` from this send

ADVISOR TIP

Before any merge-tag-heavy send, check your contact list quality. Run a quick segment on "first_name is empty" — if a meaningful fraction of your audience matches, either skip the merge tag in this campaign or fix the data first.

Custom Field Merge Tags

Every custom field you define on Contacts becomes available as a merge tag too. If you have a custom field called `favorite_destination`, you can use `{{favorite_destination}}` in any email.

Custom-field tags follow the same fallback rule — missing values render as empty strings.