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ParDreamin' December 2020

Cool Handlebar Merge Language {{HML}} Tricks

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Strategy

Cool Handlebar Merge Language {{HML}} Tricks



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Session Outline

- **What's HML Anyway?**
- **Why Use it?**
- **Basic Fields and Patterns**
- **5 Cool Tricks & Riffs**





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What the `{{FIELD}}`?

`{{HML}}` Replaces `%%MERGEFIELDS%%` in Pardot

This Feature Must Be Enabled in your Pardot Account
if it's older and you have not already done so

Streamline your tailored marketing content across Salesforce.

Upgrade the merge language you use to personalize Pardot emails to Handlebars Merge Language.

Get Started





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Isn't it nice to feel Special?

“ NotProvided, your feedback is important to us

qb intuit quickbooks.

QuickBooks Online Accountant

Hello NotProvided,
my name is [REDACTED].

I am your dedicated business consultant and QuickBooks Online expert. I would like to help set your firm up for future success, please take a moment to help me understand your role by answering the following question:


Within your firm, are you the primary decision maker?

☐ Yes, I am the sole or one of the key decision makers

☐ No, but I can influence the decision

[REDACTED]

You can reach me via:
[Schedule an appointment](#) or
[REDACTED]



[View on web](#)

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Basically a Yes/Null Question

HML is a basic form of dynamic content available to all levels of Pardot account.

**Sure you can say hello to your friend by {{Recipient.FirstName}}
But it's much more than that!**



Something

Nothing





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Standard Field Comparison

New:

- Address 1 and Address 2 now combined
- Current Day
- Current Month
- Current Year
- Account Description
- HTML Signature

B12		Assigned user's first name	
	A	B	C
5	\\addhu_wl_email\\	Link to share via email	(\\AddHu_URL_Email)
6	\\addhu_wl_facebook\\	Link to share via Facebook post	(\\AddHu_URL_Facebook)
7	\\addhu_wl_linkedin\\	Link to share via LinkedIn	(\\AddHu_URL_Linkedin)
8	\\addhu_wl_msn\\	Link to share via other social media sites	(\\AddHu_URL_Msn)
9	\\addhu_wl_twitter\\	Link to share via Twitter	(\\AddHu_URL_Twitter)
10	\\annual_revenue\\	Prospect's Annual Revenue field	(Prospect.AnnualRevenue)
11	\\assigned_user_name\\	Assigned user's name; displayed as: First Name Last Name	Assigned user's name; displayed as: First Name Last Name
12	\\assigned_user_firstname\\	Assigned user's first name	(Prospect.Owner.FirstName)
13	\\assigned_user_lastname\\	Assigned user's last name	(Prospect.Owner.LastName)
14	\\assigned_user_phone\\	Assigned user's phone number	(Prospect.Owner.Phone)
15	\\assigned_user_email\\	Assigned user's email address	(Prospect.Owner.Email)
16	\\city\\	Prospect's City field	(Prospect.City)
17	\\company\\	Prospect's Company field	(Prospect.Company)
18	\\country\\	Prospect's Country field	(Prospect.Country)
19	\\county\\	Prospect's County field	(Prospect.County)
20	\\crm_id\\	Prospect's Lead or Contact CRM ID	(Prospect.ID)
21	\\department\\	Prospect's Department field	(Prospect.Department)
22	\\email\\	Prospect's Email field	(Prospect.Email)
23	\\email_preference_center\\	Link to Prospect's default Email Preference Center page	(EmailPreferenceCenter)
24	\\fax\\	Prospect's Fax field	(Prospect.Fax)
25	\\first_name\\	Prospect's First Name field	(Prospect.FirstName)
26	\\industry\\	Prospect's Industry field	(Prospect.Industry)
27	\\job_title\\	Prospect's Job Title field	(Prospect.Title)
28	\\last_name\\	Prospect's Last Name field	(Prospect.LastName)
29	\\phone\\	Prospect's Phone field	(Prospect.Phone)
30	\\prospect_account_annual_revenue\\	Prospect account's Annual Revenue field	(Prospect.Account.AnnualRevenue)
31	\\prospect_account_billing_address_one\\	Prospect account's Billing Address One field	(Prospect.Account.BillingStreet)
32	\\prospect_account_billing_address_two\\	Prospect account's Billing Address Two field	(Prospect.Account.BillingStreet)
33	\\prospect_account_billing_city\\	Prospect account's Billing City field	(Prospect.Account.BillingCity)
34	\\prospect_account_billing_country\\	Prospect account's Billing Country field	(Prospect.Account.BillingCountry)
35	\\prospect_account_billing_state\\	Prospect account's Billing State field	(Prospect.Account.BillingState)
36	\\prospect_account_billing_zip\\	Prospect account's Billing Zip field	(Prospect.Account.BillingPostalCode)
37	\\prospect_account_description\\	Prospect account's Description field	None
38	\\prospect_account_employee_count\\	Prospect account's Number of Employees field	(Prospect.Account.NumberOfEmployees)
39	\\prospect_account_fax\\	Prospect account's Fax field	(Prospect.Account.Fax)
40	\\prospect_account_industry\\	Prospect account's Industry field	(Prospect.Account.Industry)
41	\\prospect_account_name\\	Prospect account's Name field	(Prospect.Account.Name)
42	\\prospect_account_owner_name\\	Prospect account's Owner Name field	(Prospect.Account.OwnerName)
43	\\prospect_account_ownership\\	Prospect account's Ownership field	(Prospect.Account.Ownership)
44	\\prospect_account_phone\\	Prospect account's Phone field	(Prospect.Account.Phone)
45	\\prospect_account_rating\\	Prospect account's Rating field	(Prospect.Account.Rating)
46	\\prospect_account_shipping_address_one\\	Prospect account's Shipping Address One field	(Prospect.Account.ShippingStreet)
47	\\prospect_account_shipping_address_two\\	Prospect account's Shipping Address Two field	(Prospect.Account.ShippingStreet)
48	\\prospect_account_shipping_city\\	Prospect account's Shipping City field	(Prospect.Account.ShippingCity)
49	\\prospect_account_shipping_country\\	Prospect account's Shipping Country field	(Prospect.Account.ShippingCountry)
50	\\prospect_account_shipping_state\\	Prospect account's Shipping State field	(Prospect.Account.ShippingState)
51	\\prospect_account_shipping_zip\\	Prospect account's Shipping Zip field	(Prospect.Account.ShippingPostalCode)
52	\\prospect_account SIC code\\	Prospect account's SIC Code field	(Prospect.Account.SIC)
53	\\prospect_account SIC code\\	Prospect account's SIC Code field	(Prospect.Account.SIC)
54	\\prospect_account_ticker_symbol\\	Prospect account's Ticker Symbol field	(Prospect.Account.TickerSymbol)
55	\\prospect_account_type\\	Prospect account's Type field	(Prospect.Account.Type)
56	\\prospect_account_valueto\\	Prospect account's Value field	(Prospect.Account.Value)
57	\\prospect_account_valueto\\	Prospect account's Value field	(Prospect.Account.Value)
58	\\state\\	Prospect's State field	(Prospect.State)
59	\\territory\\	The email subject	(EmailSubject)
60	\\territory\\	Prospect's Territory field	(Prospect.Territory)
61	\\territory\\	Link to Prospect's default Usercenter page	(Usercenter)
62	\\user_crm_id\\	Assigned user's CRM ID	Assigned user's CRM ID
63	\\user_email\\	The reading user's email	(Reader.Email)
64	\\user_firstname\\	The reading user's first name	(Reader.FirstName)
65	\\user_lastname\\	The reading user's last name	(Reader.LastName)
66	\\user_name\\	The reading user's full name; displayed as: First Name Last Name	(Reader.FullName)
67	\\user_phone\\	The reading user's phone number	(Reader.Phone)
68	\\user_signature\\	The reading user's text signature, available to edit in the user's profile	(Reader.Signature)



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More Dynamic Customization

“There’s a limit of **200 HML merge fields** and 10 pieces of dynamic content in an email or email template. If you’re upgrading an asset that exceeds these limits, we’ll ask you to remove some PML tags before we can convert it to HML.”





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Simple Logic using if/else

```
{{#if Merge.Field}} Some statement  
if Merge Field Has Data  
{{else}} Some other statement if  
merge field is blank  
{{/if}}
```



Something

Nothing





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What Kinds of Fields?

Yes	No/Caution!
Text	Checkboxes
Number	Radio Buttons
Dropdown	Display Multiple Responses
Date	Default Field Values
Textarea	





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Show Multiple Merge Fields

**{{#if Merge.Field}} Include the same {{Merge.Field}}
and {{Other.Merge.Fields}} if true,
{{else}} Show {{Third.Merge.Field}} if merge field is
blank,
{{/if}}**





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Show Multiple Merge Fields

{{#if Recipient.Account.AccountNumber}}

Your Sales Rep is:

{{Recipient.Owner.Name}}

{{Recipient.Owner.Phone}}

{{Recipient.Owner.Email}}

{{else}} Would you like to schedule a call? [Click here.](#)

{{/if}}





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{{Cool.HML.Trick.1}}

**Prospect Resubscribe when using
Form Handlers & Operational Emails**





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Enable Prospect Resubscribe

When someone starts to fill out a Pardot form, it warns them they have previously unsubscribed...but only if it's a *Pardot Form*.

Here's a workaround for form handlers or operational emails

First Name ★ Bill 

Last Name ★ Fetter

Company

Title

Email ★ bill+test@unfetteredmarketing.cor

{ It looks like you previously unsubscribed from email. [Click to Resubscribe](#) and we'll send an email with info. }

Phone

Request / Question



I'm not a robot



reCAPTCHA
Privacy - Terms



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SET THAT SWITCH

Automation Recipe when they Opt Out

Rules

Match Type ^{*} ☒ Match all ☐ Match any

Automation Rules are retroactive and affect all prospects that meet the selected criteria.



Prospect email status ▼

is ▼

Opted Out ▼

+ Add new rule

+ Add new rule group

Actions



Change prospect custom fiel ▼

Opted out ▼

yes





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SET THAT SWITCH

Automation Recipe when they Opt Out

```
{{#if Recipient.Opted_out_switch}} You have opted  
out! click here to resubscribe! {{Resubscribe}}  
{{else}}{{/if}}
```



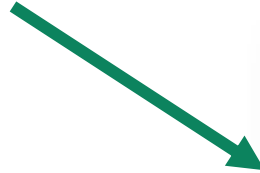


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SET THAT SWITCH

Automation Recipe when they Opt Out

{{#if Recipient.Opted_out_switch}} You have opted out! Click here to resubscribe! {{Resubscribe}}
{{else}}{{{/if}}}



Link

Link Info

Advanced

Link Type

Resubscribe Link

{{Resubscribe}}

Underline

default

Link Color

OK

Cancel





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{{tip1}}

Once Populated, Pardot Does not want to give up Data!





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CLEAR THAT FIELD!

Automation Recipe to Clear Fields when they opt back in

Rules

Match Type ☒ Match all ☐ Match any

Automation Rules are retroactive and affect all prospects that meet the selected criteria.

Prospect custom field

▼

Opted out

▼

is

▼

Yes

and

Prospect email status

▼

isn't

▼

Opted Out

▼

+ Add new rule

+ Add new rule group

Actions

Clear prospect field value

▼

Opted out

▼





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{{Cool.HML.Trick.2}}

Showing HTML Links (or not)





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A List of URLs Depending on What Products Are Owned

Use a full URL as the product name in an ownership field. If they own the product, the link shows. If they don't it's blank.

```
{{#if Recipient.Product1}} {{Recipient.Product1}} {{else}} {{/if}}  
{{#if Recipient.Product2}} {{Recipient.Product2}} {{else}} {{/if}}  
{{#if Recipient.Product3}} {{Recipient.Product3}} {{else}} {{/if}}  
{{#if Recipient.Product4}} {{Recipient.Product4}} {{else}} {{/if}}
```





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{{tip2}}

{{else}} can be blank





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Riff #1

Use the HML in the link instead of rendering the full link

```
{{#if Recipient.Product1}} Product 1 Document {{else}} {{/if}}  
{{#if Recipient.Product2}} Product 2 Document {{else}} {{/if}}  
{{#if Recipient.Product3}} Product 3 Document {{else}} {{/if}}  
{{#if Recipient.Product4}} Product 4 Document {{else}} {{/if}}
```

Link

Link Info

Target

Advanced

Link Type

URL

Protocol

<other>

URL

{{Recipient.Product1}}

Underline

default

Link Color

OK

Cancel



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Riff #2

Use the URL minus https:// to get a trackable link.

`{{#if Recipient.Product1}}` Product 1 Document `{{else}}` `{{/if}}`
`{{#if Recipient.Product2}}` Product 2 Document `{{else}}` `{{/if}}`
`{{#if Recipient.Product3}}` Product 3 Document `{{else}}` `{{/if}}`
`{{#if Recipient.Product4}}` Product 4 Document `{{else}}` `{{/if}}`

Link

Link Info

Target

Advanced

Link Type

URL

Protocol

https://

URL

{{Recipient.Product1}}

Underline

default

Link Color

OK

Cancel



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{{Cool.HML.Trick.3}}

Using HML to show Alternative Custom Redirects





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GET 2 FOR THE PRICE OF 1

Show different Custom Redirects depending if a condition exists

{{#if Recipient.Condition_1}} Why Don't you click this custom redirect so we can set multiple completion actions?{{else}}If you don't meet the conditions then click a different one so we can set different actions?{{/if}}





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{{Cool.HML.Trick.4}}

Using HML to populate a custom URL





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Expanding this Example

{{#if Recipient.Owner.Name}}

Your Sales Rep is:

{{Recipient.Owner.Name}}

{{Recipient.Owner.Phone}}

{{Recipient.Owner.Email}}

Schedule a call with me? [Click here.](#)

{{else}} {{/if}}





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Riff #1: Prepopulate a Calendar Invite Link



calendly

https://calendly.com/{{Recipient.Owner_Calendly}}/meetingtype?name={{Recipient.FirstName}}%20{{Recipient.LastName}}&email={{Recipient.Email}}

Other Standard Calendly Field names: first_name, last_name, guests, location





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Riff #2: Prepopulate a Custom URL Link, but only if the prospect is a customer

```
{{#if Recipient.Customer_ID__c}}  
https://our.customsystem.com/{{Recipient.Customer_ID__c}}  
/?email={{Recipient.Email}}  
{{else}} some other link because they are not a  
customer{{/if}}
```





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{{Cool.HML.Trick.5}}

Using HML to populate a Form Handler





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“What’s your T-Shirt Size?”

“Vegan/GF Lunch”





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Riff#1: A Form Handler can be used as a link in any email as an alternative to making someone fill out another form.

{{#if Recipient.Attending.Event}}

Click Here for a Medium Shirt

Click Here for a Large Shirt

Click Here for a Extra Large Shirt

{{else}} {{/if}}



[https://go.pardot.com/l/86842/2020-11-](https://go.pardot.com/l/86842/2020-11-22/5jrf3b?email={{Recipient.Email}}&comments={{Recipient.Attending.Event}}%20Large%20Shirt)

[22/5jrf3b?email={{Recipient.Email}}&comments={{Recipient.Attending.Event}}%20Large%20Shirt](https://go.pardot.com/l/86842/2020-11-22/5jrf3b?email={{Recipient.Email}}&comments={{Recipient.Attending.Event}}%20Large%20Shirt)





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Riff #2: A Form Handler can be used as way to copy information from one field to another, concatenate data, and add additional notes.

`https://go.pardot.com/l/86842/20201122/5jrf3b?email={{Recipient.Email}}&comments=This%20%Important%Note%20%3A{{Recipient.custom_1}}%0A&customfield_3={{Recipient.Custom1}}%2C{{Recipient.Custom2}}`

UTF-8 URL Encoding

%0A (new line)

%20 (space)

%3A (colon)

%2C (comma)





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Riff #3: Repeat Riff #2 with a form handler using Javascript in the thankyou code of a Pardot form to transfer & transform the form's input data to a form handler.





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{{Final.Thoughts}}





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Nested `{{#if}}` Statements?

**Unfortunately not
(are you listening, Salesforce?)**





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{{Owner.TestAllTheThings}}

**{{#if HML.Testing}} Never ever ever never ever
implement without thorough
testing!{{else}}Unintended Consequences {{/if}}**





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And Remember...

**Handlebars
are just a
Sideways
Bowtie**



{{Questions?}}



**Bill Fetter
UnFettered Marketing LLC**



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Ready to learn more?

- Join the ParDreamin' 2020 “Product Roadmap Keynote” with Kyle Skibbe & Prasanna Vijayakumar – **tomorrow at 10:00am EST on the main stage**
- Join the next DreamTX session at 11:30am PST on December 14
Channel: Customer 360 in Action
Title: Align Marketing and Sales to Grow Account Relationships
Website: <https://www.salesforce.com/dreamforce/>
- Time to take your Pardot strategy, technical and creative skills to the next level? Join Sercante for additional trainings in 2021 - <https://www.sercante.com/pardot-training/>

