

The purpose of this document is to show you that you can use DocMergy using the basic native HubSpot properties based on a **contact trigger**.

You can download this document and put into the DocMergy to see how it works. If some tokens are not working and appear as they are written in code just try rewrite it out

Document structure

- Basic Tokens
- Get Associated Objects
- Search by Unique IDs
- If Branches
- If Block Branches
- Dynamic Images
- Dynamic Hyperlinks

The properties you will need to have filled on a contact are:

First Name

Last Name

Last Contacted

Company Name

Country/Region

City

Street Address

Close Date

Create Date

Annual Revenue

Phone

A Deal

Deal Name

Note on the Deal

Create Date of the Note

Line Items

Line Item Name

Line Item Description

Website URL: you will need to create a custom property for image URL and then search it up on the token generator to get the token to insert here.

The property should be called: 'Profile Picture URL' and the internal name will be: 'profile_picture_url'

Basic Tokens

Basic native HubSpot property tokens

First name: John

Last name: Interesting

First name last name: John Interesting

First name last name upper case: JOHN INTERESTING

Last contacted: Thursday, 23 January 2025

Company Name: Interesting Inc

Country/Region : New Zealand

City: Auckland

Street Address: 14 Jervois Road

1. Basic Tokens with styling

First name upper case: JOHN

First name and last name in bold: **John Interesting**

2. Basic Tokens with formatting (Date Formatting & Token Generator)

Create Date: 08:02PM. 27 Nov 24

Create Date (eg. 09 April 2025): 27 November 2024

Create Date (eg. 09/04/2025): 27/11/2024

3. Basic Tokens in text boxes

Annual Revenue	Annual Revenue
250,000	250,000
Phone	Phone
+09 3092835	+09 3092835
Contact First Name	First Name
John	John

4. Basic Tokens in header & footer***

To {{ object.firstname }} {{object.lastname }}

- Goes in the heading section

Get Associated Objects

1. Get singular version

- You will need to associate a deal to a contact and vice versa, you can do this manually
- It shows the name of the first deal associated with the current contact.

Contract Renewal

The function `get_associated_objects` takes 4 arguments

- "contact": is the source object of the association
- `object.hs_object_id`: the id of the source object, here it is the enrolled object ID
- "deal" the associated object type you want to get data from
- The last argument is "order_by" and is the property you want to use for ordering the list of "deals". You can get more info here <https://support.integrationglue.com/docmergy-how-to-get-data-from-associated-objects>

the `[0]` tells DocMergy to only grab the first associated deal you can here use `[1]` if you want the second one or `[-1]` if you want the last one
dealname is the internal property name of the "deal" you want to display
and finally the `{{ }}` around it are telling DocMergy to render the property in the document

2. For loop version

- This loops through all notes on the first deal associated with the contact, and shows each note's content and creation date.
- You can create multiple notes to see the tables be filled

Title	Description
Deal DM Test.pdf generated by DocMergy from template Deal%20-%20If%20ELSE%20test.docx	10:50PM. 08 Apr 25
Deal DM Test.pdf generated by DocMergy from template Deal%20-%20If%20ELSE%20test%20v3.docx	11:12PM. 08 Apr 25
Deal DM Testv3.pdf generated by DocMergy from template Deal%20-%20If%20ELSE%20test%20v3-1.docx	11:14PM. 08 Apr 25
Deal DM Testv3.pdf generated by DocMergy from template Deal%20-%20If%20ELSE%20test%20v3-1.docx	11:17PM. 08 Apr 25
Deal DM Testv4.pdf generated by DocMergy from template Deal%20-%20If%20ELSE%20test%20v3-1.docx	11:18PM. 08 Apr 25
Deal Testing.pdf generated by DocMergy from template Deal%20Testing%20.docx	01:55AM. 14 Apr 25
Deal Testing.pdf generated by DocMergy from template Deal%20Testing%20.docx	02:00AM. 14 Apr 25
Deal Testing.pdf generated by DocMergy from template Deal%20Testing%20.docx	02:21AM. 14 Apr 25
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Deal Testing.pdf generated by DocMergy from template Deal%20Testing%20.docx	02:30AM. 14 Apr 25
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3. For loop images

- This code loops through the line items on the first deal linked to the current contact and displays each item's name, description, image and image text.
- You can create multiple contacts to see the tables be filled

JPEG/JPG

Title	Description	Image
Line Item Test 1	This is the test 1	<div>  </div> <div> This Image: Line Item Test 1 </div>
Line Item Test 2	This is line item test 2	<div>  </div> <div> This Image: Line Item Test 2 </div>

Search By Unique IDs

1. Get singular version

- This shows the first name of the contact with the HubSpot ID: 80716298250

Search for the unique ID of and show first name John



2. For loop version

- This loops through a list of contacts (looked up by their IDs) and displays their first name, last name, and email address.

First name	Last name	email
John	Interesting	newnic12@gmail.com
Someone	Boring	test123@gmail.com

3. For loop images

- This loop grabs two specific contacts by their HubSpot IDs and displays each person's name and converting the profile picture URL to a visible image

First name	Last name	Profile Picture
John	Interesting	
Someone	Boring	

For looping images you will need to create a property with a public URL linking to an image. You can upload an image to HubSpot files, get the URL and put it in the property you made.

You will then need to create the custom relevant custom token which is associated to the property you made eg. Object profile picture URL and then put that in the ALT text for the image

If you right click on the image you need to insert what the token would be for the custom property you made, except “object.” It needs to be “c.profile_picture” so its taking the other contacts URL and not the contact that is enrolled.

If Branches

1. Basic If Branch

What it does:

- If the firstname property exists and has a value - it will say Hello !
- If firstname is blank or missing → it will say Hello there!

Hello John!

2. If Else Branch

- This code checks if the first deal associated with the current contact has a deal name, and if it does, it displays it — otherwise, it shows “No deal name found.

Contract Renewal

Associated Deal Name: Contract Renewal

3. If Elif Branch

Kia ora! Looks like you're based in New Zealand

- If the contact's country is "New Zealand" →
→ Kia ora! Looks like you're based in New Zealand.
- If it's "Australia" →
→ G'day! You're located in Australia.
- If it's something else or blank → nothing shows (no else block included).

4. If Elif Else Branch

Hello, John! We're happy to assist you today

How it works

If: If the contact's first name is "John", it will display:
Hello, John! We're happy to assist you today

Elif: If the contact's first name is "Jane", it will display:
Hello, Jane! We're excited to help you with your inquiry

Else: If the contact's first name is any other name, it will display:
Hello, [First Name]! Thanks for reaching out to us.

If its any other first name eg. Alex, it will display
Hello, Alex! Thanks for reaching out to us.

The name is dynamic but everything after will remain the same “Thanks for reaching out to us”. John and Jane have their own text to display

If Block Branch

1. Examples for normal text

- If the contact's first name is Sam, the output would be: "Hello Ben*, thanks for reaching out!"
- If the first name is blank, the whole block (including the greeting) is skipped entirely.

Hello John, thanks for reaching out!

2. Examples for in tables

- If the contact has a first name, it displays their full name in a text box

Contact	Email
Someone Interesting	SomeoneInteresting@gmail.com
John Interesting	JohnInteresting@gmail.com

3. Examples for deleting images, tables and text boxes

- If the token contains no value, delete everything between
`[% block if object.contact.owner %]` and `{% end block %}`
 - In this case the property is empty
- If the token does contain a value, then keep everything in between.

Dynamic Images

- Dynamic images use a placeholder but will take an image URL associated with the enrolled object

Eg. Display Profile Picture

- Eg. With the custom property you made for the profile picture, put the token in the ALT text



Dynamic Hyperlinks

- Dynamic hyperlinks use a placeholder of any text of your choice but will take the website associated with the enrolled object and change according to the enrolled object.
- If the contact has a property with a website URL in it then the Dynamic Hyperlink grabs that link and puts it in the text

Website URL (Edit Link): [This is Dynamic Link to the Website URL](#)