

Custom field types[Ⓜ]

This article applies to:

[Pro](#)

[Max](#)

You can create custom fields for your contact and company records. Keap Pro customers can create up to 100 custom fields for contact and company records, while Keap Max customers can create 150 custom contact and company fields.

The **field type** you choose should correspond with type of data you want to store in a way that satisfies your end-goal for the data (i.e. reporting, merge field, etc.).

Below is a complete list of all field types that are available and description of each.

You cannot change an existing field type to another type. For example, if you create a radio button and then later decided you want a drop-down box instead, you will have to create a new drop-down field and remove the old one. In many cases, you can export data out of your old fields into a csv and then import the data into the new field.

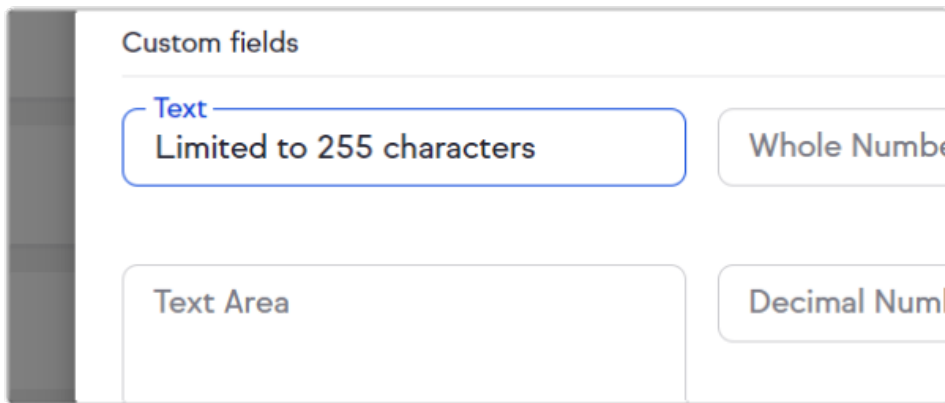
Please note: If you are toggling from Max Classic to Ultimate and have custom date/time fields, they will be present on the contact record, but you will not be able to edit or create a new date/time custom field as Ultimate does not yet support this field type.

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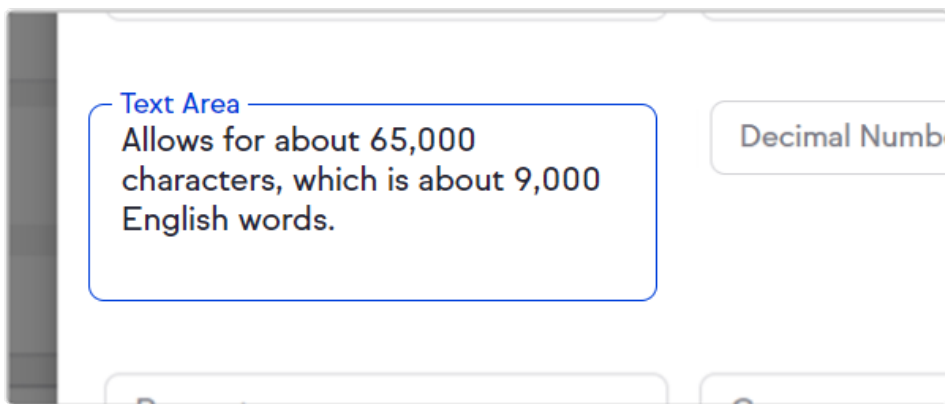
Text and number fields

Use the text and number fields to store a variety of custom information. These are most commonly used as reference fields and merge fields in emails, letters, and task templates.

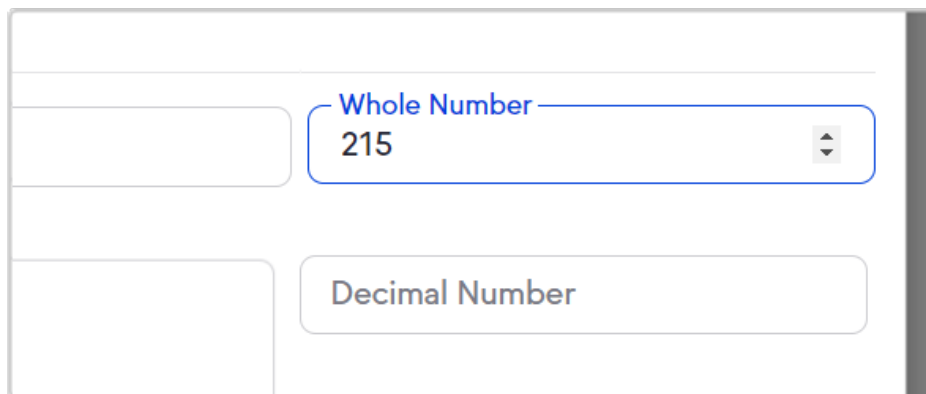
Text: Stores all types of data (letters, numbers, and symbols), but is limited to 255 characters. It is best used for short-answer input



Text Area: Stores all types of data (letters, numbers, and symbols). Allows for about 65,000 characters, which is about 9,000 English words. It is often used to capture open ended feedback from a web form (i.e. survey or contact us.)



Whole Number: Stores whole numbers only. It will not accept letters, symbols, or decimal points



Decimal Number: Stores decimal numbers. It will not accept letters or symbols. The decimal will round to the hundredths

	Whole Number
	Decimal Number 355.81

Percent: Stores any number, but displays it with a decimal point and a percentage (%)

Percent 52.72	Currency
Date	Day of Week

Currency: Stores any number with a decimal point and a dollar sign (\$)

	Currency 47.99
	Day of Week

Date fields

Use date fields to store custom date information like birthdays, special events, renewal dates, etc. The dates can be merged into emails, letters, and task templates to personalize them and to use them as event reminders.

Date: Stores a custom date. Simply type in the desired year or use the up and down arrows to select it

A screenshot of a web form. At the top left is a "Date" input field with a calendar icon. A date picker is open, showing a calendar for January 2019. The date "21" is selected and circled. To the right of the date picker is a "Day of Week" dropdown menu. Below these are a "Year" input field, another "Dropdown" menu, and an "Email Address" input field.

Day of Week: Stores the name of a day in text format (i.e. Monday.)

A screenshot of a web form. The "Day of Week" dropdown menu is open, showing a list of days: Sunday, Monday (selected), Tuesday, Wednesday, Thursday, and Friday. To the left of the dropdown are the "Date" and "Month" input fields. Below the "Month" field are three radio button options: "Yellow", "Blue", and "Green".

Month: Stores the name of a month in text format (i.e. January.)

A screenshot of a web form. The "Month" dropdown menu is open, showing a list of months: January, February, March (selected), April, May, and June. To the right of the dropdown menu are the "Year" input field, another "Dropdown" menu, and an "Email Address" input field.

Year: Enter a year in numerical format (i.e. 2016.)

A screenshot of a form interface. At the top, there is a field labeled 'Day of Week' with a calendar icon to its left and a dropdown arrow to its right. Below this is a field labeled 'Year' with a dropdown arrow to its left and a dropdown menu showing '2019' with a double-headed arrow to its right. At the bottom, there is a field labeled 'Dropdown' with a dropdown arrow to its right.

Option Lists

Use option list fields to create solid criteria for searching and reporting. You define a limited number of options for each field instead of allowing clients to enter values.

Radio: Creates radio button options that all display at once. Only one option can be selected at a time.

A screenshot of a form interface. On the left, there is a field labeled 'Radio' with three radio button options: 'Yellow', 'Blue', and 'Green'. The 'Blue' option is selected. On the right, there is a field labeled 'Dropdown' with a dropdown arrow to its right.

Drop-down: Creates a drop-down list with a limited number of options. The client must click on the list to view and select from the options. Only one option can be selected at a time. You can add up to 2000 characters or 499 items in each drop-down list.

A screenshot of a form interface. On the left, there is a field labeled 'Radio' with three radio button options: 'Yellow', 'Blue', and 'Green'. Below this is a field labeled 'User' with a dropdown arrow to its right. On the right, there is a field labeled 'Dropdown' with a dropdown arrow to its right. The dropdown menu is open, showing four options: 'Short', 'Long', 'Wide', and 'Email Address'.

Checkboxes: Creates a list of options that can be "checked". Unlike radio options, multiple checkbox options can be selected at once.

Checkboxes

- Option 1
- Option 2
- Option 3
- Option 4

User: Lists the names of your users. This can be used to merge in multiple users' names into messages (i.e. sales rep and account manager.)

A screenshot of a form interface. On the left, there is a dropdown menu labeled 'User' with a downward arrow icon. The menu is open, showing a list of users, with 'Greg Mann' highlighted in a grey bar. To the right of the dropdown are two input fields: 'Email Address' and 'State'.

Specially formatted fields

Use these fields to expand the number of standard fields.

Email Address: Stores an additional email address

A screenshot of a form interface. On the left, there is a dropdown menu with a downward arrow icon. To the right of the dropdown is an input field labeled 'Email Address' containing the text 'rahha_kera8@yahoo.com'. Below the dropdown and email address fields is another input field labeled 'State' with a downward arrow icon.

Phone Number: Converts a number to U.S. phone number format - (XXX) XXX-XXXX. Use this field to add more than 5 phone numbers to a record.

A form with three input fields. The first field is labeled "Phone Number" and contains the text "502-747-3579". The second field is labeled "State" and is empty. The third field is labeled "Website" and is empty.

State: Creates a U.S. state drop-down

A form with four input fields. The first field is labeled "Phone Number" and is empty. The second field is labeled "Website" and is empty. The third field is labeled "Social" and is empty. The fourth field is labeled "State" and is a dropdown menu with a list of U.S. states: Alabama, Alaska, American Samoa, Arizona, Arkansas, and California. The "Alabama" option is selected and highlighted.

Website: Converts a web address into a hyperlink for one-click access to the website listed.

A form with three input fields. The first field is labeled "Phone Number" and is empty. The second field is labeled "State" and is empty. The third field is labeled "Website" and contains the text "http://alwayshelpful.org".

Note: Only the **website** field type can be used to merge a URL into an email. Saving a URL to any other custom field type and attempting to merge that value into an email will result in a [Liquid syntax](#) error.