

# 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 records, while Keap Max customers can create 150 contact custom fields. All customers can also create up to 100 custom company fields that are distinct from your contact custom 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.

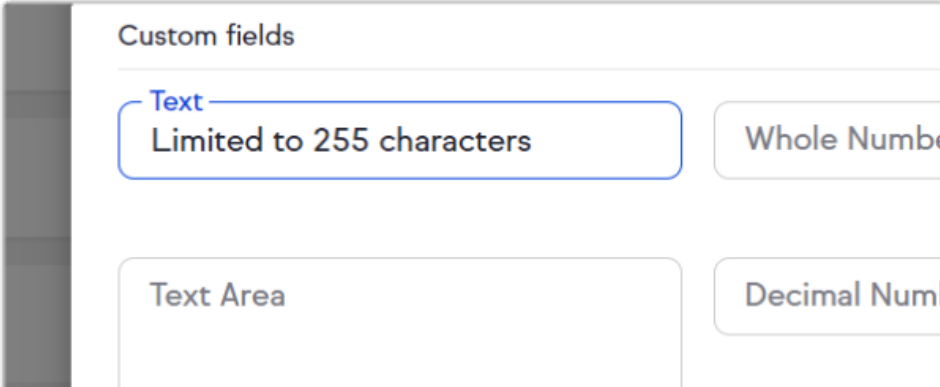
You cannot change an existing field type to another type. For example, if you create a radio button and then later decided you want a drop-down box instead, you will have to create a new drop-down field and remove the old one. In many cases, you can export data out of your old fields into a csv and then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

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## Text and number fields

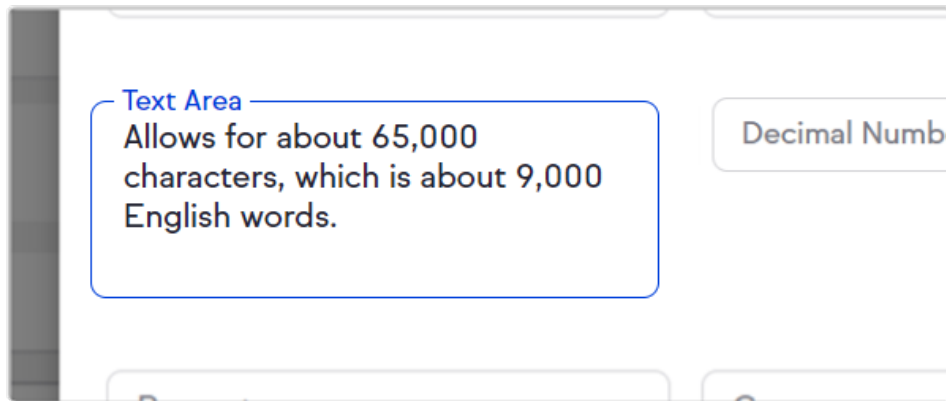
Use the text and number fields to store a variety of custom information. These are most commonly used as reference fields and merge fields in emails, letters, and task templates.

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



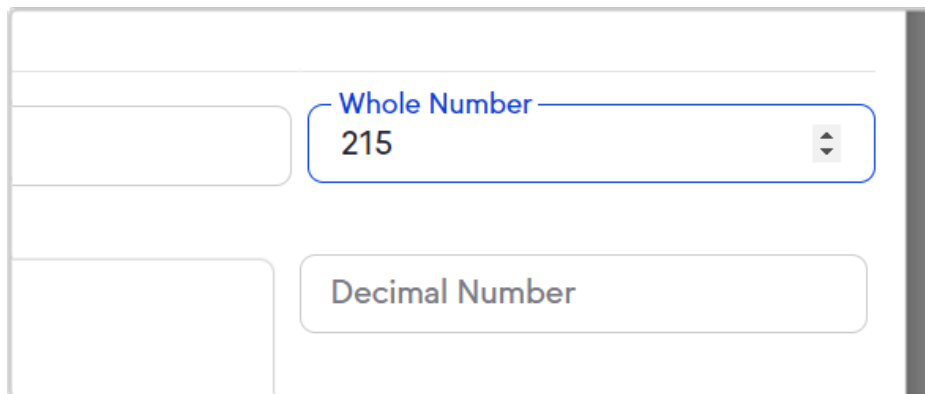
The screenshot shows a 'Custom fields' configuration window. It features a list of field types: 'Text' (highlighted with a blue border and the note 'Limited to 255 characters'), 'Text Area', 'Whole Number', and 'Decimal Number'.

**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.)



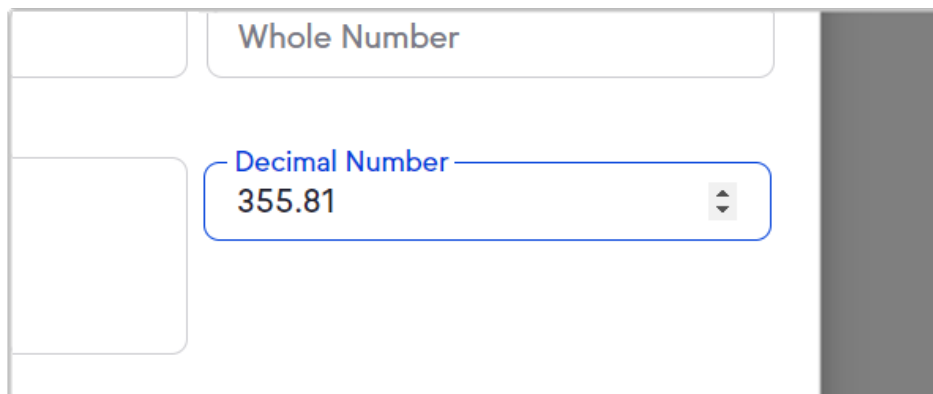
The screenshot shows a form interface. A blue-bordered box highlights the text: "Text Area Allows for about 65,000 characters, which is about 9,000 English words." To the right, a grey-bordered box contains the text "Decimal Number". Below these, there are two empty input fields.

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



The screenshot shows a form interface. A blue-bordered box highlights the text: "Whole Number 215". Below it, a grey-bordered box contains the text "Decimal Number". To the left of these fields are two empty input boxes.

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



The screenshot shows a form interface. A grey-bordered box contains the text "Whole Number". Below it, a blue-bordered box highlights the text: "Decimal Number 355.81". To the left of these fields are two empty input boxes.

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

A screenshot of a form with two input fields. The first field is labeled 'Percent' and contains the value '52.72'. The second field is labeled 'Currency' and is currently empty.

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

A screenshot of a form with two input fields. The first field is labeled 'Currency' and contains the value '47.99'. The second field is labeled 'Day of Week' and is a dropdown menu.

## 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 form with two input fields. The first field is labeled 'Date' and has a calendar popup open. The calendar shows the month of January 2019, with the date 21 selected. The second field is labeled 'Day of Week' and is a dropdown menu.

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

This screenshot shows a form with several input fields. At the top left is a 'Date' field with a calendar icon. To its right is a 'Day of Week' dropdown menu that is open, showing a list of days from Sunday to Friday, with 'Monday' highlighted. Below the 'Date' field is a 'Month' dropdown menu. To the left of the 'Day of Week' menu are three radio button options labeled 'Yellow', 'Blue', and 'Green'.

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

This screenshot shows a form with four input fields. On the left is a 'Month' dropdown menu that is open, displaying a list of months from January to June, with 'March' highlighted. To the right of the month list is a 'Year' text field. Below the 'Year' field is a 'Dropdown' menu. At the bottom right is an 'Email Address' text field.

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

This screenshot shows a form with three input fields. At the top left is a 'Day of Week' dropdown menu. Below it is a 'Year' dropdown menu that is open, showing the value '2019'. At the bottom right is a 'Dropdown' menu.

## 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.

Radio

Yellow

Blue

Green

Dropdown

**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.

Radio

Yellow

Blue

Green

User

Dropdown

Short

Long

Wide

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 selected item is 'Greg Mann'. 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 'Email Address' field 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 screenshot of a form interface. On the left, there is an input field labeled 'Phone Number' containing the text '502-747-3579'. To the right of the 'Phone Number' field is an input field labeled 'State' with a downward arrow icon. Below the 'Phone Number' and 'State' fields is an input field labeled 'Website'.

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

Phone Number

Website

Social

Website

State

- Alabama
- Alaska
- American Samoa
- Arizona
- Arkansas
- California

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

Phone Number

State

Website

<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.