

# Custom fields management

This article applies to:

[Pro](#)

[Max](#)

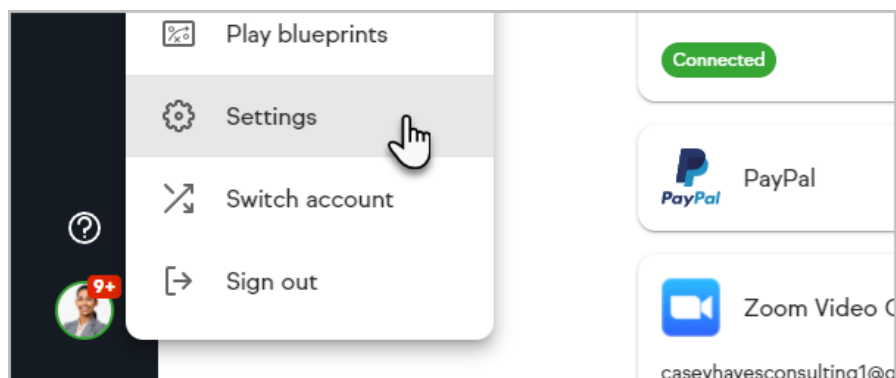
You can create custom fields for your **contact** and **company** records. Keep Lite and Pro customers can create up to 100 custom fields for contact records, while Keep Max customers can create 150 contact custom fields. All customers can also create up to 100 custom company fields that are distinct from your contact custom fields.

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

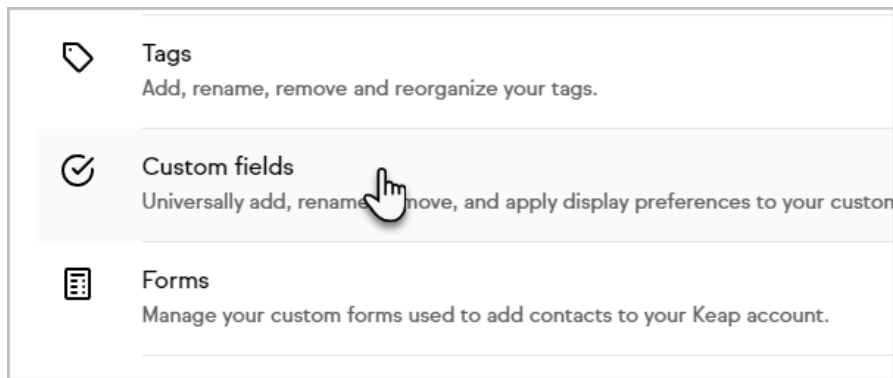
1. [Access Custom Fields Management](#)
2. [Create and add a custom contact field](#)
3. [Organize custom contact fields](#)
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## Access Custom Fields Management

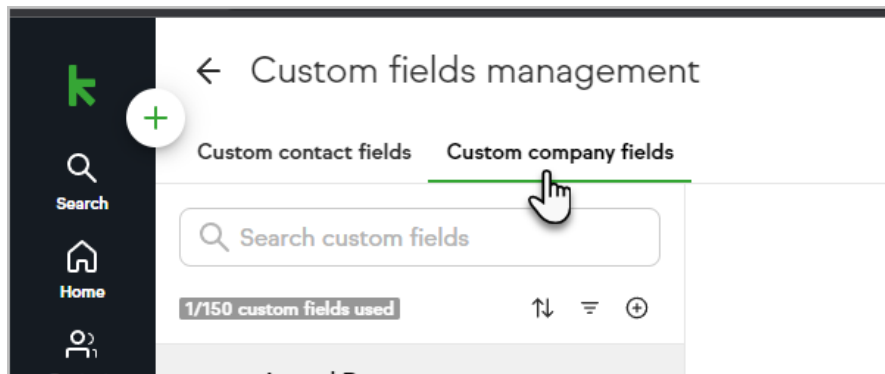
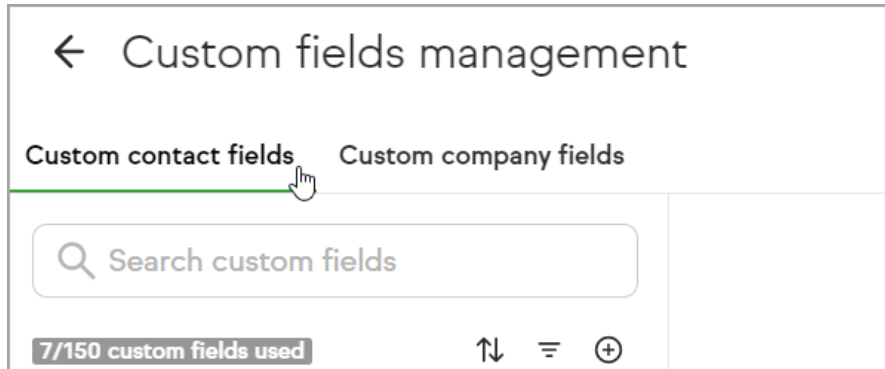
1. Click on your user avatar and choose **Settings**



2. Click **Custom fields** in the settings options

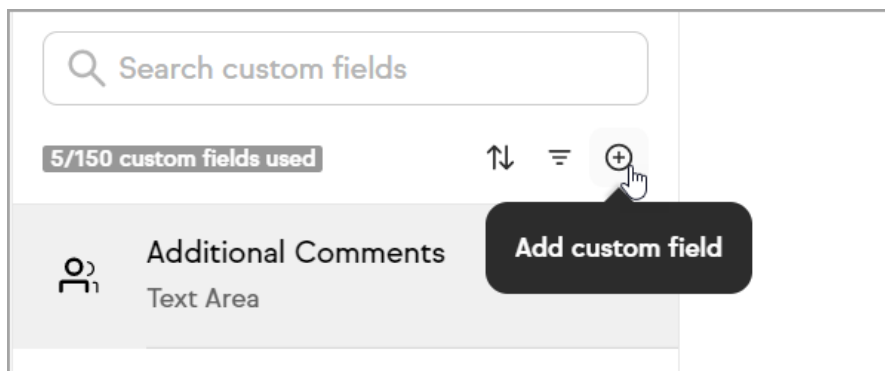


3. Select if you want to manage your **contact** or **company** custom fields



## Create and add a custom contact field

1. From the custom fields management page click the **+** icon above the list of custom fields



2. Name your custom field
3. Select your [custom field type](#)

5/150 custom fields used

Field name\*  
Product Preference

Field type\*  
drop

Dropdown

4. Select if you want the custom field to **always be visible on all contacts** in the edit view (otherwise it will need to be added to a contact manually)

**Advanced**

Always shown  
If checked, this field will be automatically displayed on every contact record.

Create field Cancel

5. Click **Create field**

## Organize custom contact fields

- You can **search** for custom fields by adding keywords to the search area

floor

7/150 custom fields used

Age of Current **Flooring** (years)  
Whole Number

**Flooring Preference**  
Checkboxes

- Click the **↕** icon to organize your custom fields alphabetically or reverse alphabetically and group by field type

6/150 custom fields used

Sort custom fields by

Name, A-Z

Name, Z-A

Group by field type

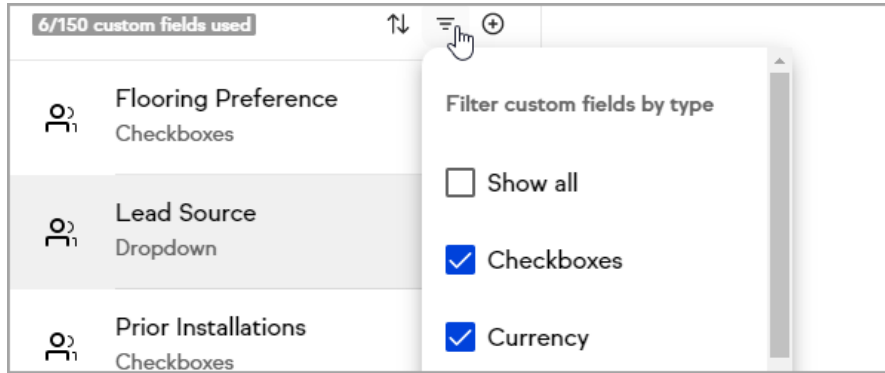
Checkboxes

Flooring Preference

Prior Installations

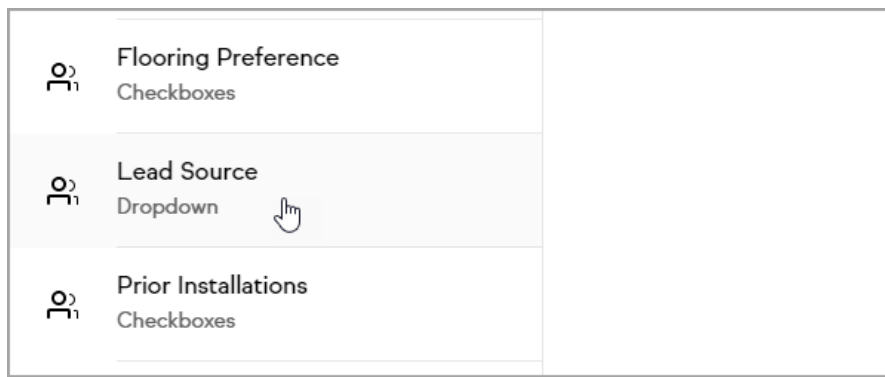
Dropdown

- The ☰ icon allows you to **choose** which field types appear in the list of custom fields within the customer field manager



## Edit a custom contact field

1. Select the custom field you want to **edit**



2. Decide what **details** you want to edit on the custom field

Field name\*  
**Lead Source**  
11/100 characters

Field type  
Select  
Field type cannot be changed after creation.

Field Options\*  
Social Media  
Google Ads  
Organic Marketing  
Word of Mouth  
School Ads

Set the first dropdown option as selected by default

This field is being used to store data by 1 contact.

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**Advanced**

Always shown  
If checked, this field will be automatically displayed on every contact record.

**Delete this custom field**  
If you delete this custom contact, you will also lose all the data stored in it across all contacts. **This action is permanent.**

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3. Edit the custom field

Field Options\*  
Social Media  
Google Ads  
Organic Marketing  
Word of Mouth  
School Ads


Set the first dropdown option as selected by default

This field is being used to store data by 1 contact.



4. Click **Save changes**

Always shown  
If checked, this field will be automatically displayed on every contact record.

**Delete this custom field**  
If you delete this custom contact, you will also lose all the data stored in it across all contacts. **This action is permanent.**

 Delete field

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 Save changes  Cancel changes

## Delete a custom contact field

**Warning:** This will delete the field and any data it contained for your contacts. Consider how many contacts are using this field before deleting.

This field is being used to store data by **72** contacts.




### Advanced

Always shown

1. Select the custom field you want to delete
2. Click Delete field

Always shown  
If checked, this field will be automatically displayed on every contact record.

**Delete this custom field**  
If you delete this custom contact, you will also lose all the data stored in it across all contacts. **This action is permanent.**

 Delete field

3. Confirm by clicking Delete field again

## Delete custom field and all stored data?

If you delete this custom field, you will also lose all the data stored in it across all contacts. **This action is permanent.**

[Go back](#)

[Delete field](#)

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