

Custom fields management

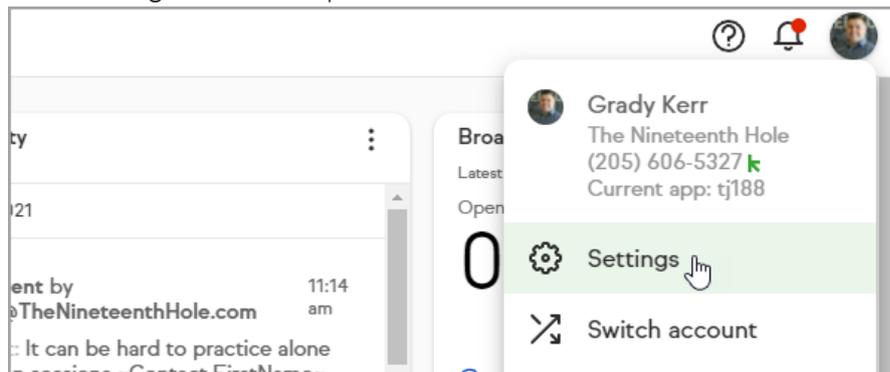
This article applies to:

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.

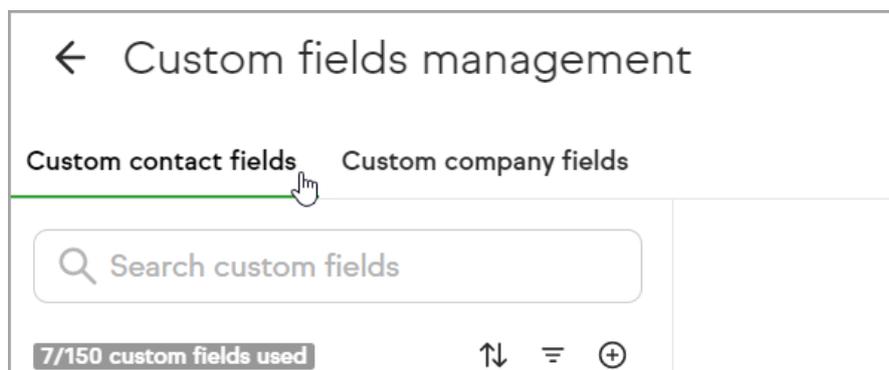
The field type you choose should correspond with the type of data you want to store in a way that satisfies your end goal for the data (i.e. reporting, merge field, etc.).

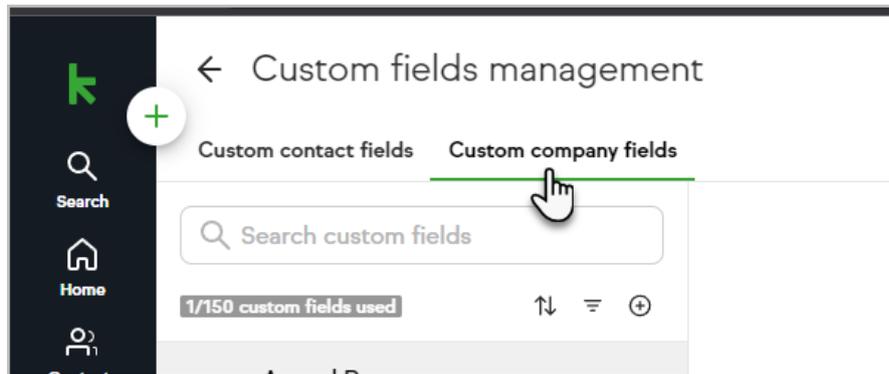
Access Custom Fields Management

1. Click the **Profile Icon**
2. Click **Settings** from the dropdown



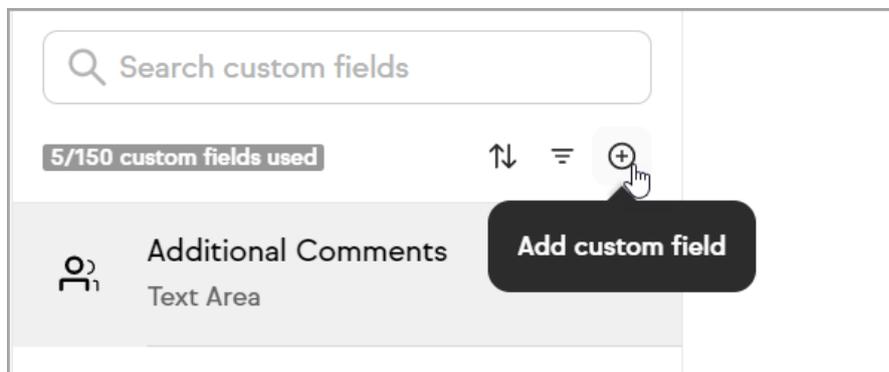
3. Click **Custom fields** in the settings options
4. Select if you want to manage your **contact** or **company** custom fields





Create and add a custom contact field

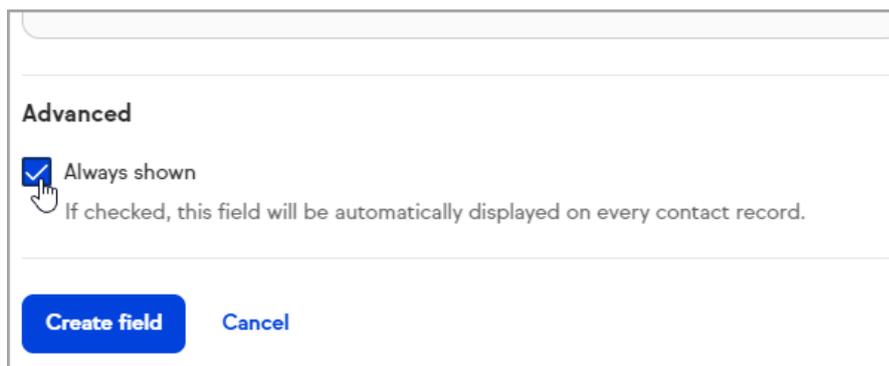
1. From the custom fields management page click the **+** icon above the list of custom fields



2. Name your custom field
3. Select your **custom field type**



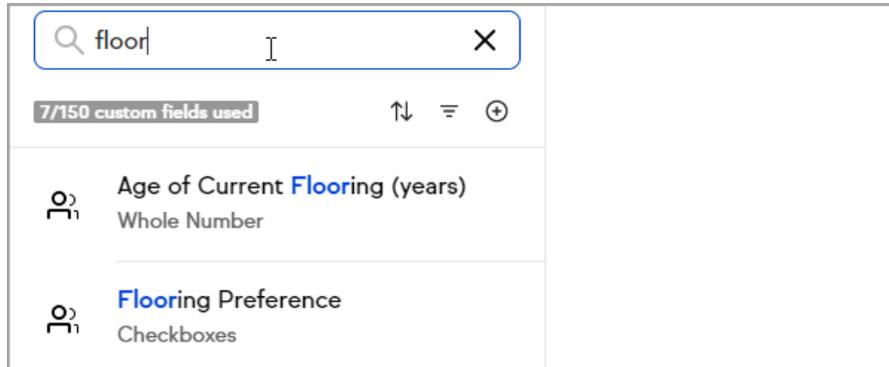
4. Select if you want the custom field to **always be visible on all contacts** in the edit view (otherwise it will need to be added to a contact manually)



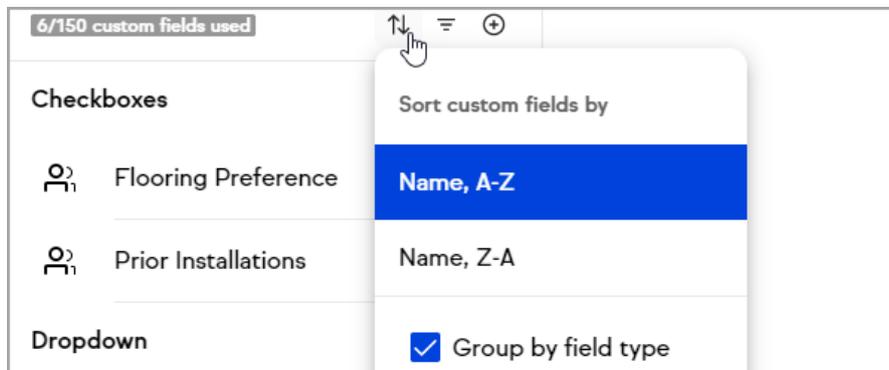
5. Click **Create field**

Organize custom contact fields

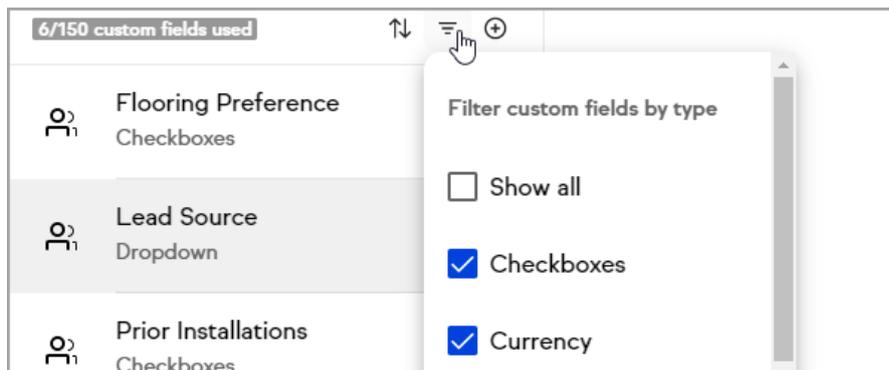
- You can **search** for custom fields by adding keywords to the search area



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



- 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**

	Flooring Preference Checkboxes
	Lead Source Dropdown 
	Prior Installations Checkboxes

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

Field name*
11/100 characters

Field type
Field type cannot be changed after creation.

Field Options*

Set the first dropdown option as selected by default

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

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.**

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 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](#)