Custom fields management

This article applies to:

Pro
Max

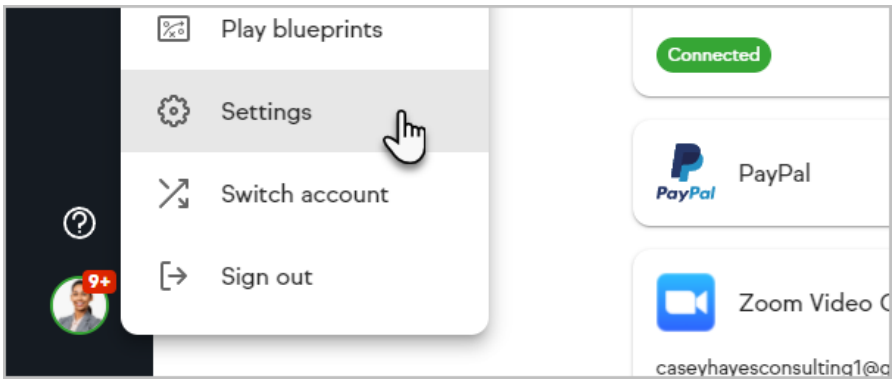
You can create custom fields for your **contact** and **company** records. Keap Lite and Pro customers can create up to 100 custom fields for contact records, while Keap Max customers can create 150 contact custom fields. All customers can also create up to 100 custom company fields that are distinct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

The field type you choose should correspond with 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.).

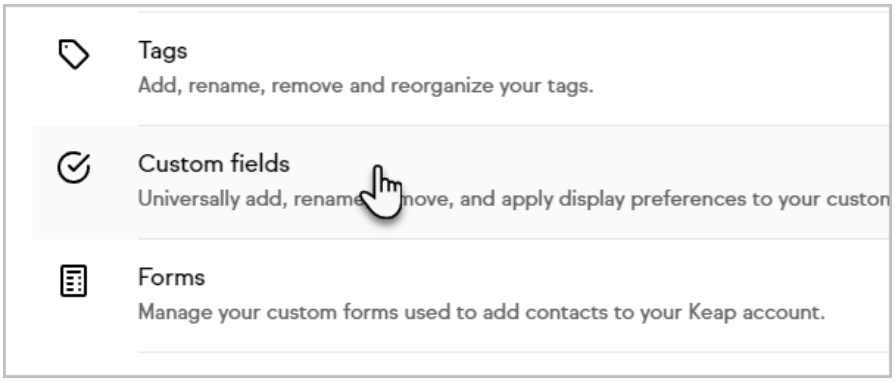
1. Access Custom Fields Management
2. Create and add a custom contact field
3. Organize custom contact fields
4. Edit a custom contact field
5. Delete a custom contact field

Access Custom Fields Management

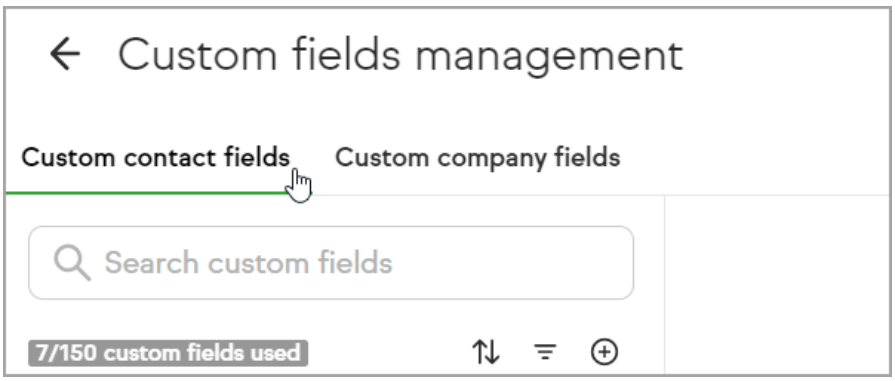
1. Click on your user avatar and choose **Settings**

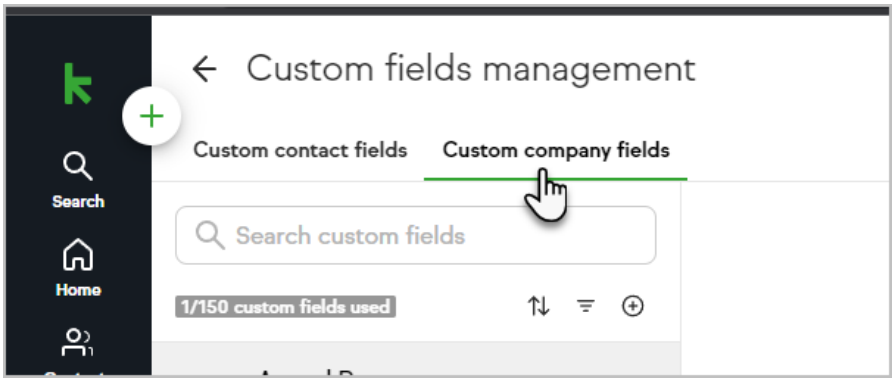


2. Click **Custom fields** in the settings options



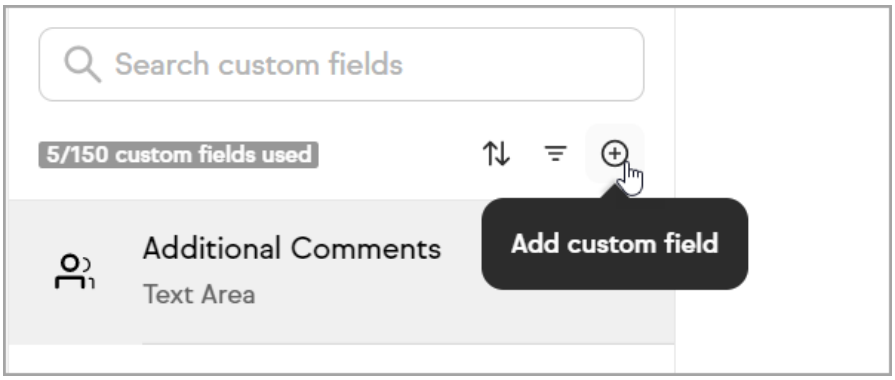
3. Select if you want to manage your **contact or company** custom fields





Create and add a custom contact field

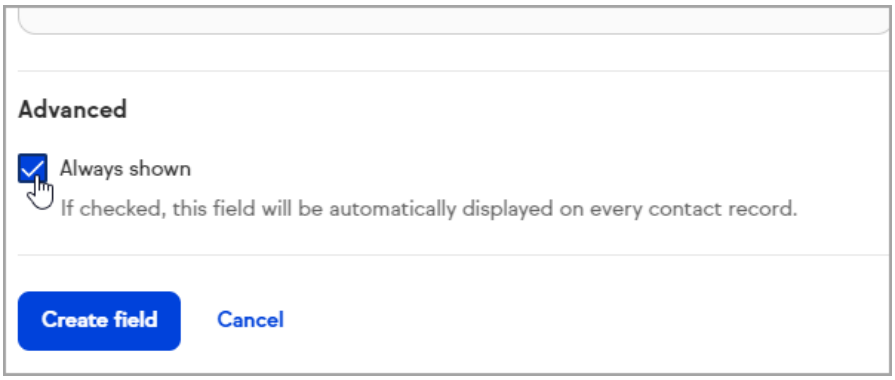
1. From the custom fields management page **click the ⊕ icon** above the list of custom fields



2. **Name** your custom field

3. Select your custom field type

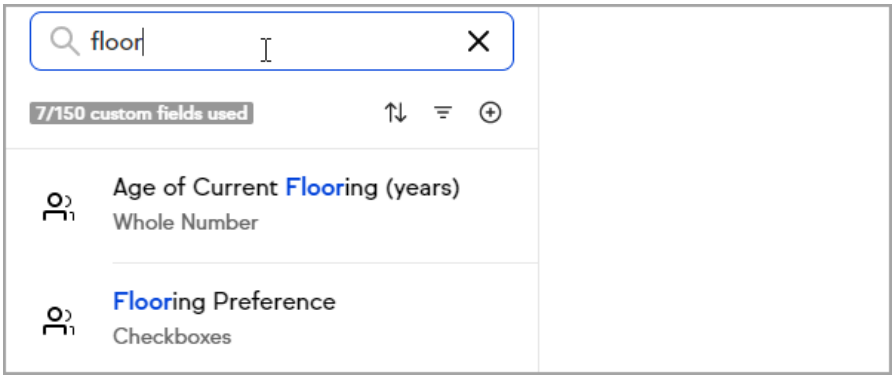
4. Select if you want the custom field to **always be visible on all contacts** in the edit view (otherwise it will need to be added to a contact manually)



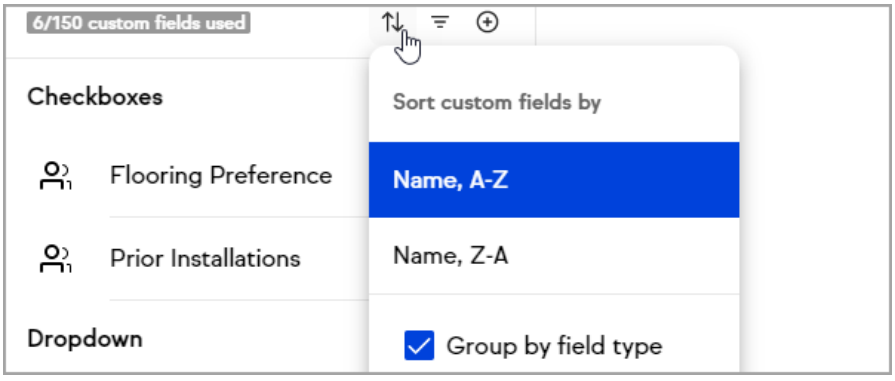
5. Click **Create field**

Organize custom contact fields

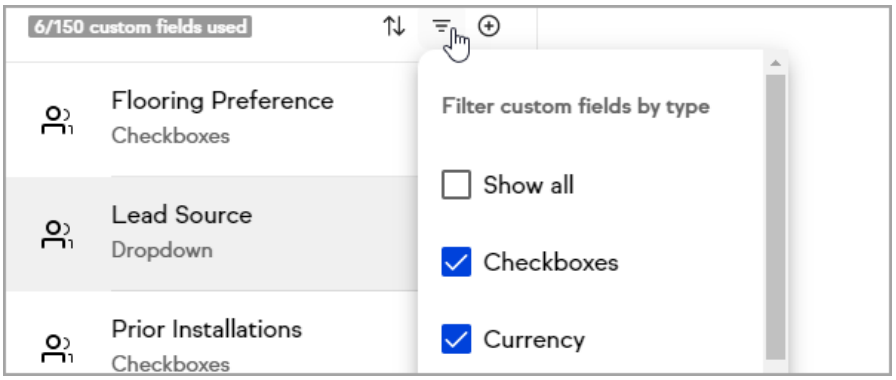
- You can **search** for custom fields by adding keywords to the search area



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



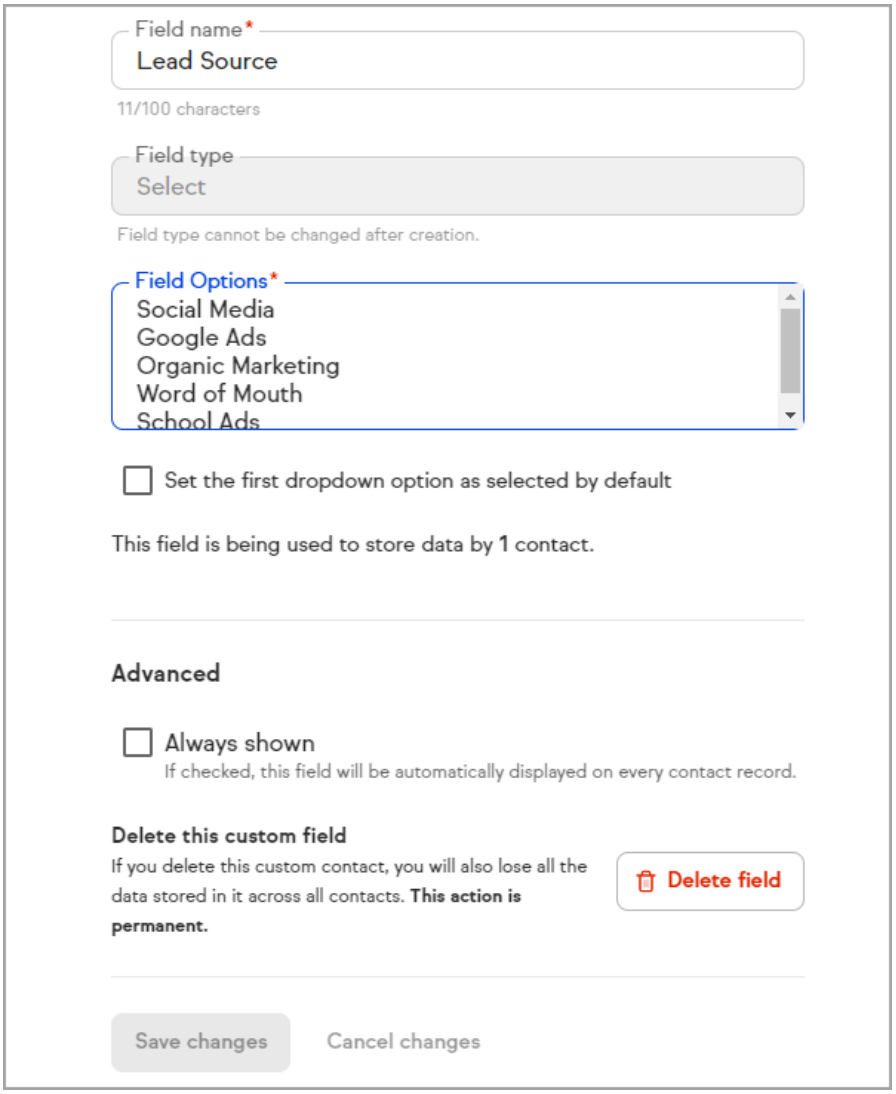
- The icon allows you to **choose** which field types appear in the list of custom fields within the customer field manager



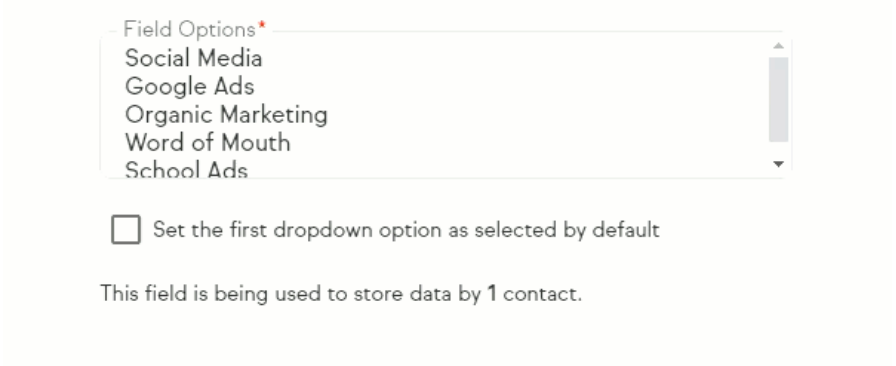
Edit a custom contact field

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

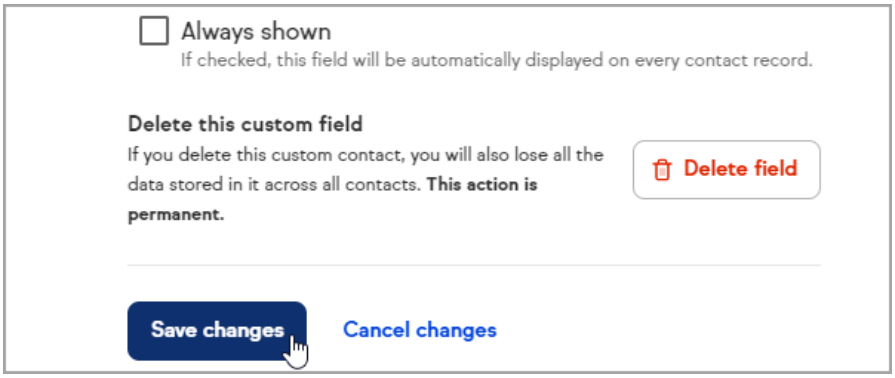
2. Decide what **details** you want to edit on the custom field



3. **Edit** the custom field

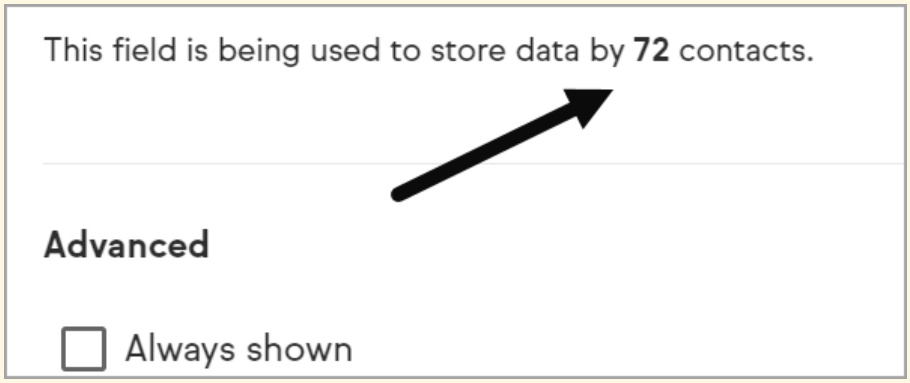


4. Click **Save changes**

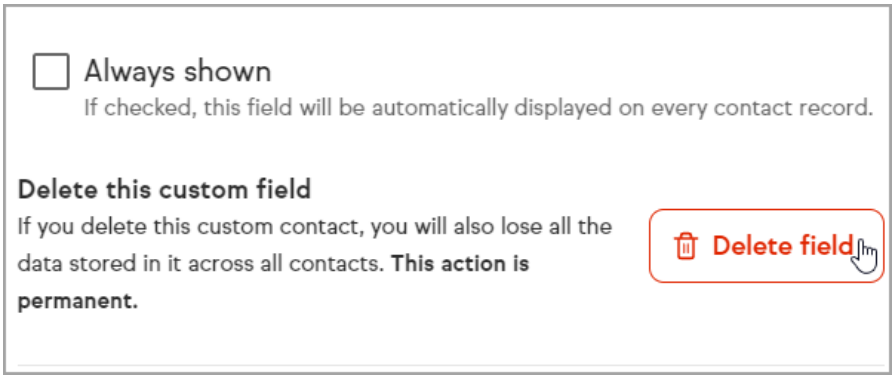


Delete a custom contact field

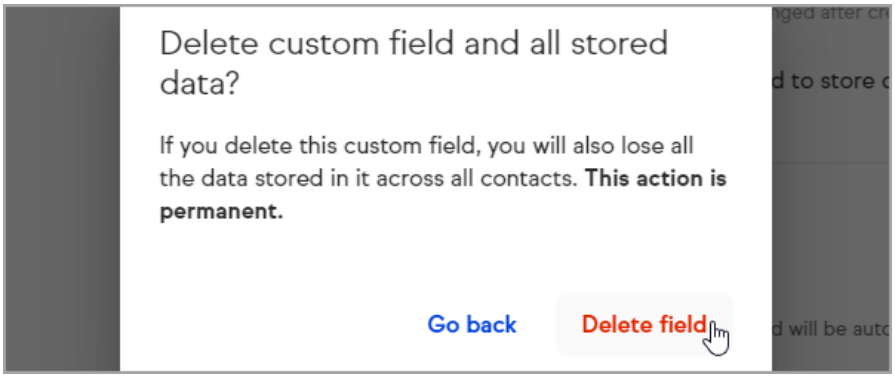
Warning: This will delete the field and any data it contained for your contacts. Consider how many contacts are using this field before deleting.



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